

Unitarian Universalist Ministers Association

UUMA Task Force on Retired Ministers

*Recommendations & resources for best practices in
right relations among settled, interim &
retired ministers & their families*

UUMA, UURMaPA, UUIMG, UUA



October 1, 2012

Report of the Retired Ministers Task Force of the Unitarian Universalist Ministers Association

Overview. 1-6

Best Practices

Right Relations Between Settled & Retired Ministers.	7-10
The Interim Period.	11-12
Temptation.	12
Minister Emeritus/Emerita.	13
Ministry of Absence.	13
Staying Away.	14
Retiring Well.	15
Leaving a Church.	16
Partner's Role.	16
One Partner's Story.	17
When a Congregant Initiates Contact.	18
Contact with Former Church Staff.	18
Chapter Practices.	19
Role in Installation of Settled Minister.	20

Tool Kit

Minister Emeritus/Emerita.	21-22
Relationship between Settled Minister & Emeritus.	23-24
Covenant between Minister Emeritus & Interim.	25-27
Role of Minister Emeritus in Residence.	28-29
Right Relations.	30-31
Conversation/Covenant: Retired & Settled Ministers	32-34
Conversation/Covenant: Settled Minister & Retired Partner.	35-37

Task Force Methodology. 38-39

Footnotes. 40

Report of the Retired Ministers Task Force of the Unitarian Universalist Ministers Association

Introduction

In October 2011 the Unitarian Universalist Ministers Association (UUMA) Board of Trustees responded to concerns for improving the relationships between settled ministers and retired ministers. The UUMA formed a task force to gather, consider and report on best practices. These issues came to the Board's attention from retired ministers, the Board of the Unitarian Universalist Retired Ministers and Partners Association (UURMaPA), the UU Interim Ministers Guild, UUMA Good Officers and settled ministers with retired ministers in the congregations they serve.

While there are a variety of resources available for retired ministers and those working with retired ministers, there is no training or support system created through collaboration by the various UU organizations involved. Thus, the Task Force was charged to:

Consider best practices and make recommendations for how we can improve relationships between retired and settled ministers. This charge is understood to include relationships between interim ministers and retired ministers, and issues related to family members of retired ministers.

The Task Force was charged to report back to the UUMA Board of Trustees by October 2012.

The Task Force includes:

Jim Eller, Vice President UURMaPA, retired minister
Chris Lilly Backus, former member UURMaPA Board, retired minister's partner
Mary Hnottavange-Telleen, UU Interim Ministry Guild member
John Robinson, retired minister, former interim minister
Fritz Hudson, settled minister with minister emeritus
Peter Luton, settled minister with minister emeritus
Keith Kron, Director, UUA Transitions Office
Bill Hamilton-Holway, Task Force Chair, President UUMA

The methodology of the work of the task force is documented on pp. 38-39. This document reflects the unanimous consensus of our task force members. We thank individual contributors for their perspectives. Authors of the various sections are listed on p. 40.

Guiding Principles Around Right Relations

The Task Force identified guiding principles for right relations.

- The *dynamic of loss and grief* is central to the retirement experience and must be addressed.
- In all situations the congregation's health is primary.
- The authority and ministry of the currently serving minister(s), whether called, interim, hired, part-time or full-time, are paramount within the congregation, and necessarily will govern the role and behavior of any clergy currently present in the congregation.
- There is value for the well-being of the retiring minister and the congregation in practicing the *ministry of absence* as a necessary period of reflection and redirection.
- The relationship between the newly settled minister and the retired minister remaining in the congregation should be articulated in a public covenant.
- The time leading to retirement and the two years after retirement are critical periods of transition for ministers and partners.

Recommendations

Applying these guiding principles to the many situations identified concerning retired ministers, the Task Force offers seven recommendations:

Recommendation #1

We recommend the UUMA Good Offices Program be expanded to provide Good Officers specially trained in working with situations involving retired ministers.

Having a Good Officer will provide retired ministers with someone who understands their situation, including their sense of loss. It provides retired ministers with someone to talk with in addition to the Transitions Office Director.

Having Good Officers trained and serving in this capacity will reassure all our ministers that there are resources available to support them through the life journey of their ministry.

We recommend the Retired Minister Good Offices Program include enough Good Officers to serve all of the UUA "regions."

We recommend that UURMaPA make nominations for Retired Minister Good Officers. The appointment process would then be:

1. UURMaPA Board identifies Good Officer candidates to serve all regions

2. UURMaPA confers with the Transitions Director to see if there are any concerns raised by any nomination
3. UURMaPA Board proposes to the UUMA Board names of ministers to serve as Good Officers
4. UUMA Board appoints Good Officers

We recommend the UUMA explore the idea of establishing a staff- level Continental Good Officer, to oversee all Good Officers.

The Work of the Retired Ministers Good Officers

The Task Force has identified the dynamic of *loss and grief* as a central component of most issues and situations with which the Retired Ministers Good Officers will work. We urge them to pay special attention to and to work with these dynamics.

The Transitions Director is a resource for Good Officers. Good Officers can consult with the Transitions Director, recognizing they will have different positions and perspectives, but are on the same team, working for the best for the congregation, the minister(s), and our Unitarian Universalist movement.

Training

Retired Ministers Good Officers should receive training as all UUMA Good Officers do, and specialized training in the dynamics around ministerial transitions and retirement. They should be well versed in the resources available to support their work.

Resources to be developed might include written booklets, YouTube videos, and workshop outlines. The UUMA website capacity for video conferencing can be used for tutorials and training for those approaching retirement.

Special attention should be given to:

- situations in which a minister is retiring and staying in the community she or he served,
- forced retirement situations, and
- situations in which the physical and/or mental health of the minister is an issue.

We believe pre-retirement training can prevent serious issues in ministerial relationships at the time of retirement and can be an “early warning” opportunity when issues arise.

We believe the most effective training will include UURMaPA, UUMA, UUIMG and Transitions Office personnel.

Recommendation #2

We recommend UUMA, UURMaPA, UUIMG and the UUA Transitions Office publish and distribute this report along with the UURMaPA booklet *A Helpful Guide for UU Retired Ministers & Partners, 2013 Revised Edition*, available at www.uurmapa.org.

Recommendation #3

We recommend UURMaPA develop and sustain support groups for retired ministers' partners and surviving partners. A peer coaching model could be used.

Recommendation #4

We recommend the UUMA, UUA Transitions Office, and UU Interim Ministers Guild, continue conversation about healthy boundaries training throughout the ministerial career, and specifically for retired ministers.

Recommendation #5

We recommend to the UURMaPA Board, with the support of the UUMA, that we continue the practice of providing facilitated peer support groups for ministers approaching retirement and ministers in their first two years of retirement.

Recommendation #6

We recommend that UUMA and UURMaPA engage in an ongoing conversation on the meaning of retirement.

Recommendation #7

We recommend retired ministers, their life partners or surviving life partners become involved in UURMaPA.



Resources

The Task Force identified these resources as useful for the variety of situations involving retired ministers and their families.

1. *On Retirement: A Helpful Guide for UU Retired Ministers & Partners, 2013 Revised Edition*, UURMaPA publication available online at uurmapa.org
2. *Running Through the Thistles*, UUA Transitions Office
3. *From Age-ing to Sage-ing*, Zalman Schacter-Shalomi and Ronald S. Miller



Promoting Right Relations Between Settled and Retired Ministers

The *UUMA Guidelines* speak to the relationship between settled and retired ministers in the following ways:

Guidelines for the Unitarian Universalist Ministry

When my ministry to a congregation has ended, I will refrain from offering or performing ministerial services for members of that congregation, except at the invitation of my incumbent successor colleague(s).

If I belong to or attend a congregation served by a colleague, I will honor the prerogatives of that colleague's responsibility for leadership in that congregation, and in all ways seek to support that colleague's ministry. I will initiate an open and direct conversation with my colleague(s) in order to create a mutually agreed covenant, expressed in a Letter of Understanding, about the role I am to play in the church. If I am a member of a congregation that I once served, this may include the possibility of absenting myself from any presence at all. I will articulate clearly my own hopes and expectations regarding my relationships in the congregation, and my intention to avoid wielding any undue influence among the members. I will only participate in leadership roles that support and benefit the ministry, and at the request and with the permission of the minister(s). I will neither listen to nor volunteer criticisms of my colleague(s). As necessary I will describe appropriate channels of communications to members seeking to express concerns.

If I am a settled minister in a congregation having retired or other ministers as members, I will seek to foster cordial and candid relations with my colleagues in recognition of the value of their presence in the congregation. I will initiate an open and direct conversation with my colleague(s) to enter a mutually agreed covenant, expressed in a Letter of Understanding, about their participation in the life of the congregation. I will bring any concerns arising from the relationship my colleague(s) have with the congregation directly and promptly to the attention of my colleague(s).

If I am elected Minister Emeritus/a, I will recognize that this honor sustains a continuing but changed relationship with the congregation I once served as one of its ministers. I will initiate an open and direct conversation with my successor colleague(s) to enter a mutually agreed covenant, expressed in a Letter of Understanding, about the role I am to play in the church. My successor colleague may choose to include the congregation's board of trustees in this covenant process. I will honor the prerogatives of my colleague's responsibility for leadership, and in all ways seek to support that colleague's ministry.

If I am a settled minister in a congregation that has elected a Minister Emeritus/a, I will recognize the meaning of the honor that the congregation has bestowed, and the significance of the continuing relationship of ministry it implies. I will initiate an open and direct conversation with my Emeritus/a colleague(s) to enter a mutually agreed upon covenant, expressed in a Letter of Understanding, about their participation in the life of the congregation. I will bring any concerns arising from the relationship the Minister Emeritus/a has with the congregation directly and promptly to that colleague's attention. (See also pp. 13, 23-25)

The discovery of ministerial misconduct and the healing of congregations, agencies or enterprises that have experienced such misconduct, take priority over the expectations of collegial courtesy.

Commentary

Every situation has unique considerations of history, context and personality. The following thoughts are intended to be applicable in a wide variety of situations and relationships between colleagues; i.e., settled and retired minister who stays within the community, settled and retired minister who moves away from the community, ministers emeriti/ae, parish and community ministers, settled and beloved retired, settled and controversially retired. Here we hold up and elaborate upon the salient principles from the *Guidelines*.

Principles and Resulting Practices

1) Priority of Settled Minister's Call

- a. The authority and ministry of the settled minister, whether called, interim, hired, part-time or full-time, are paramount within the congregation;
- b. When leaving service to a congregation, by retirement or re-settlement, a minister ends all professional rights and responsibilities with that congregation;
- c. The bestowal of emeritus/emerita status by a congregation is honorific, expressing gratitude and continued affection, but, unless specifically delineated in the conferral of the title, does not confer any rights or responsibilities except for offering delegate status for GA;
- d. All professional guidelines and courtesies regarding presence and participation in the congregation served by a colleague continue to inform the relationship between a settled and a retired minister;
- e. Therefore, a settled and retired minister must be in agreement regarding the actions and propriety of the retired minister's participation in the life of the congregation; i.e., prior agreement is necessary before a retired minister agrees to perform a rite of passage, chair a committee, teach a class; and
- f. The retired minister is not obligated to respond positively to every request for his or her participation by the settled minister; i.e., the retired minister may decline a request by the settled minister to preach on Christmas morning, conduct a memorial service or teach an Introduction to Unitarian Universalism class.

2) The Power and Authority

Though leaving professional service to a congregation ends all official ministerial authority, it does not necessarily remove the informal power of a previous/retired minister. It is useful, therefore, to acknowledge that the retired minister's presence and legacy continue to ripple within the life of the congregation, regardless of the retired minister's presence and actions. This acknowledgement reduces the opportunity for the retired minister to unintentionally influence congregational life and politics and for the settled minister to overreact to the retired minister's physical or emotional presence.

3) Right Relations are Covenantal

- a. Both ministers bring their best selves to the relationship.
- b. Assume best intentions of each other.
- c. Speak honestly, directly and specifically to one another.

- d. Respect and trust are essential elements in developing and maintaining right relationship.
- e. The welfare of the congregation is foremost and trumps ego, career and legacy.
- f. Right relations are established and maintained when there is an explicit clarity regarding the role of a retired minister within the congregation.
- g. Some retired ministers are active in clearly pastoral or leadership roles:
 - Some are involved only in activities further from the church's political center
 - Some have nothing to do with the life of the church
 - Some show up only when invited
- h. What worked or was rewarding at one time for the settled and retired ministers may change over time and their respective roles may also change with time, i.e., just because we did it that way before does not mean we have to continue to do it that way now.
- i. When there is a change in the settled ministry, a new relationship and understanding between settled and retired ministers are required.
- j. Therefore, a written and public *Statement of Covenant* between the settled and retired ministers is strongly encouraged, especially if the retired minister remains within the community and geographic area, (the Guidelines speak of a Letter of Understanding, we prefer the language of Covenant);
- k. The participation of the retired minister in the installation of his or her successor may be an excellent opportunity to share the Covenant with the congregation. It is powerful for the congregation to see and hear the retired minister release the role of settled minister and celebrate the one who is now called by the congregation.
- l. It is healthy for settled and retired ministers to model right relationships within the congregation;
- m. Formal and public acknowledgement of each other's roles and responsibilities are appropriate; i.e., inclusion of the retired minister when recounting the history of the church, the presence and participation of the retired minister in special worship services and events such as ordinations, installations or building anniversaries.
- n. Regular conversation between ministers helps maintain the relationship and makes it easier to work through disagreements and disappointments.

4) Friendships Within the Congregation

The Guidelines are silent on the question of developing and or maintaining friendships within the congregation. While friendship and socializing with members of the congregation is avoidable, it is not unheard of, and may prove to be one of the most difficult terrains when it comes to maintaining appropriate boundaries within the congregation.

While it is not necessary for the retired minister to report every conversation and interaction he or she has with a congregant, it is appropriate for the retired minister to share with the settled minister the names of parishioners with whom he or she has established close relationships. The retired minister will do well to follow the protocol of informing the settled minister of requests to perform rites of passage. Similarly, it profits the settled minister little, if at all, to make an issue out of such requests by congregants.

Still, the retired minister will be most successful when she or he refers such requests back to the interim or settled minister.

In this age of burgeoning “social media,” a retiring minister or partner will need to find ways to gracefully end contact with Facebook “friends” from within the congregation. This allows the newly settled minister(s) to establish their own contacts within the church and not find themselves triangulating with parishioners and colleagues.

5) Other Gleanings

- Having a good idea of what one wants to do with his or her retirement is a valuable thing. Unwelcome retirement complicates things.
- Over-identification with the role of minister can be a dangerous thing.
- There are many UU and community organizations that would benefit from the expertise and insight of ministers with some time on their hands.
- Older ministers are not universally fuddy-duddies, and it is both good practice and beneficial to pick the brains of retired colleagues, regardless of whether you follow their advice or not. Nearly everyone appreciates being asked their opinion. A public covenant between the settled and retired minister helps the congregation make a good transition. (See pp. 32-34)
- There is also value in getting to know the retired minister’s partner or surviving partner and to consider including her or him in a covenant. (See pp.35-37)
- The ministry can be lonely. Why isolate yourself?
- It can be difficult, even painful, to recognize that one is no longer on the inside, where the action and energy is.
- The concerns and interests of settled ministers and retired ministers are not necessarily the same.
- In what ways is being a retired minister different from and similar to being a retired teacher, lawyer, police officer, farmer, athlete or politician?

The Interim Period

Interim ministers currently serve UU congregations for a maximum of two years. The focus of their ministry is suited to congregational needs as they navigate a period of leadership transition between settled ministries. Interim work is highly intentional and is typically organized around recognized tasks that orient the congregation toward the future. In most cases this ministry involves efforts that raise congregational awareness and aid members in assessing their current situation in order to help them clarify values and set clear goals for the period. In general, interim work prepares the community to enter fully and wholeheartedly into covenant with a new settled minister who will be aligned with the congregation's realistic hopes for the future. Interim work celebrates and encourages respect for recent ministries and honors the congregation's heritage. In addition, it intends to widen the lens through which members have come to understand their identity, and to encourage wise choices that will reflect a growing openness to prophetic calling and a renewed sense of mission geared to today's challenges.

Under optimal circumstances, interim ministers hope that departing/retiring ministers will have done their best to prepare themselves and their congregations for their retirement and departure. In the best cases they will have reflected an optimistic view of the transition period; they will avail themselves of collegial and other support systems outside the congregation, reflect with their partner on the decision to undertake the new life stage, and generally engage in planning for the future.

It is possible to over-plan and in some cases there may be a temptation to believe that one can actually serve as one's own interim, and possibly save one's beloved congregation from unnecessary suffering. Letting go and generating trust in another professional minister to skillfully care for the congregation in transition is a gift that will benefit the next phase of ministry.

It is a good practice for interim ministers to have an initial conversation with departing ministers early on, long before misunderstandings may arise, as a routine matter after they have contracted. Interim ministers will typically expect that the former minister, ministerial partners and their personal effects will be physically absent from the congregation, and remain so for the length of the interim period.

There are departures marked higher than ordinary levels of distress, in which the usual rhythms that attend a retirement are obscured. In such cases, a careful assessment of the circumstances in consultation with other responsible leaders and UU religious professionals and good officers will play a significant part in the design of the interim ministry going forward.

The new UUMA Guidelines recommend that a "Letter of Agreement" be drawn between the retiring and interim ministers which is limited in application to the interim period. While it is generally desirable that a "Ministry of Absence" (see p. 13) be practiced by the recent retiree, there may be situations that obviate the wisdom of a single standard. At this time there is not a general template recommended by either the Transitions Office or the Interim Guild that can be used to guide such letters. The document that follows reflects one particular agreement, that touches on most items that may come up

during an interim period. There may be others that would be appropriate to consider. If there is any disagreement, both interim and retired ministers are advised to seek the help of good officers, trained specially to facilitate a process of reaching agreement based on the concern held in common for the well-being of the congregation in question.

Retired ministers who have previously been designated emeritus/a, and already reside as members of the congregation in transition will not be arbitrarily disrupted by an interim minister. The guidelines refer a practicing interim minister to the Transitions Office and the district executive in circumstances that warrant changes that will affect previous arrangements. It is likely that a new interim minister will initiate a conversation with any present minister that will clarify relationships during the interim period.

It is assumed naturally by an interim minister that ministers emeriti/ae already present in the congregation or nearby will exercise the privileges that have been accorded them in such a way as to “support the well-being of the congregation and the success of future ministers.” We hope that all will agree to abide by the *UUMA Guidelines*, and recognize as standard, that when the new settled minister arrives a new covenant must be negotiated.

Temptation!

Email subject: Request from [church] members to [retired minister's name]
My husband and I joined [retired minister's former church] during the time you and [former associate minister] were ministers. We are still members. We are doing a sweet sixteen birthday party for our daughter on [date]. We are doing blessings by some of the important people in her life before the party at our home. She has been in RE at [church] since she was an infant. We wondered if you could possibly do a UU blessing for her? We are asking everyone to talk for about five minutes. Not sure if you still do these things. If you can do this, what would be appropriate to give you for this service? (*Temptation 1: Money*) We could meet with you before the party, so you could get to know [our daughter] a little. Thanks for your consideration. There is such flux at [church] we don't feel too connected to anyone and your sermons were the reason we stayed with [church]. (*Temptation 2: You were so good, and well the current ministers aren't our cup of tea. But you we flatter.*) [signed by the couple]

The retired minister resisted the temptation. Suggested to the couple that the interim ministers be contacted and sent the correspondence on to the interim ministers. It turned out that they had already been contacted and had declined the invitation.

Minister Emeritus or Emerita

The UUA website as a good overview of the process of naming a minister emeritus/a (See pp. 21-22) There is not a job description for this honorary designation. Some find satisfaction in working in our Partner Church Program, representing the congregation they have served in this international endeavor. Others maintain a role by participating in public events in their community, on behalf of the church. For example, he or she might offer an invocation, prayer or benediction at an interfaith or civic ceremony. The minister emeritus/a could also have a presence at the installation or ordination of a minister, perhaps giving a charge to the minister or the congregation. And he or she could have a role in dedicating a new building or marking another significant change to the physical plant. If the minister emeritus/a no longer lives in the community, the congregation will need to consider its responsibility in paying for travel if she or he is invited back. It's helpful to have clarity on this and to know if the partner's travel would be included, too.

Ministry of Absence

For the retiring minister, leaving for the interim period is essential to facilitate the transition work of the congregation and the interim. If the retired minister returns following the interim period, she or he must be prepared to take a limited role. It's a spiritual discipline to do so. We acknowledge the sacrifice this can be for the retiring minister and the minister's partner. A *Ministry of Absence* gives the retiree and the retired minister's partner a chance to try on new roles outside the church and allows much needed space for the interim minister to do his or her work with the congregation. The congregation may well find the absence painful, but the interim minister has the skills and training to help with healing as it is needed. The next settled minister will then have the best possible situation for starting her or his new ministry.

*We shape clay into a pot,
but it is the emptiness inside
that holds whatever we want.*
Tao Te Ching



Staying Away

Ruppert Lovely was the founding minister of Countryside Church in Palatine, IL, which he served for 36 years. He led its growth so that it has a new and beautiful church home. Outside the door of the church is a large rose quartz boulder given in honor of Ruppert and his late wife, Julie. It's a fitting memorial now. His adherence to the rule of staying away was a great gift to the church. Speaking at his memorial service, the Rev. Hilary Krivchena shared these reflections:



When I came to Countryside Church I knew a bit about Ruppert. I'd met him at Meadville. There was a long period between Ruppert's ministry and mine; but such a space doesn't guarantee a smooth new settlement. Many a meddlesome emeritus has, intentionally or unintentionally, undermined the ministry of a successor. Ruppert was clear that he planned to keep his distance. Now, there may be people who don't understand why this should be – but it's a gift, strange as it seems, that a minister gives to his or her former congregation and successor.

It's a gift to allow the next ministry to take root and remind the congregation that ministers – even ones who stay for 36 years – leave and don't retain leadership of a congregation and its ways of doing things. We tell retired ministers to wait at least two years into a new ministry before returning to where they were once minister. Often the longer the time away the stronger the next ministry will be. It's a tremendous and costly gift that ministers of integrity give. Ruppert's love for the members of Countryside never faded. But he loved them and his calling enough to pay the high price of this gift. For this integrity alone I feel blessed to have known this man.

On Retiring Well

The secret to a happy retirement, and to a healthy church after we retire, is simple: Make a list of all the things we might have taken up and did not; make a list of all the friends outside the church that we never had time for. Take these things up. Let go of the church we served.

When my son was three years old and I was in my first church, an older child told my son that he could not do something in the church. He turned and said, “Yes I can! My daddy owns this church!” Where he got that notion I have no idea, but it was probably from his father. It was a misconception into which we all fall. How easy it is to say, “My church.”

The church was never ourselves (no matter how flattering that is to one’s ego). The “church” (society or fellowship) is the *gathered people*. If by chance we leave the community healthy, that is fully functioning adults, they do not need us. If we did not leave them healthy, by what logic do we think that our meddling is going to somehow magically make them healthy now? Interfering does not insure our legacy, it only pollutes the water.

So again, what in our lives did we pass up? Playing bridge, writing a book, sculling, training puppies for assistance dog programs, tutoring children, giving undivided attention to our partners, reading trashy novels, reading *The New York Times* cover to cover, *The New Yorker*, joining a nudist colony, taking up hiking or hang gliding, volunteering at the library, or becoming a body builder? Now is the time for all these and perhaps other things.

If all we have been is “the church,” it is time for liberation. Maybe we have feigned politeness for years. Let our inner curmudgeon out - but not in that old congregation. They probably knew it was there all along anyway, despite our attempts to hide it. Let the curmudgeon out elsewhere.

Before we retire, the trick is to make a list of things we haven’t time to do. Oh, we can start that list the first year of ministry. Keep it. It will be a boon in our retirement and for the congregations to which we gave so much. If we retire well, we will have not time for, or thought of that church we served.

Retire boldly and flourish.



Leaving a Church

My husband served five churches, one for just a year when he was a student, one for 11 years, one for six years, and then two interims. I was an active member in every church. In each case, when our time was up we left completely, despite moving only 70 miles from his second settlement to his third settlement.

This worked well for us, even though initially we had some very disappointed former congregants. If we had stayed in touch with all five congregations we would now have more than 2,300 parishioners!

Eight years ago we retired to a community of our choosing which has an active UU fellowship. However, we left after three years because we found it didn't work for us to return to the pews.

A minister emeritus usually has a clearer role, that needs be worked out with the congregation and the settled minister. In many cases, a minister who has served a church for some length of time may come to feel that there will always be a place at that church and that he or she will choose what that is. In some cases, the retired minister can be unintentionally destructive. In other cases the retired minister can be a valuable resource.

In our experience, it's best to clear out completely and return only if invited by the settled minister. Ministers are not called for life to be part of a particular congregation.

Minister's Partner's Role

When my partner was in divinity school I rather reluctantly joined a group of ministers' partners. In 1980 we coined the name "UUMPs" (UU Ministers Partners). Past names had been "Ministers Wives" and then "Ministers Mates." We met monthly in Boston. It was an amazing group. There I learned that there were many models of partnership. Some had been unpaid co-ministers, others took on key roles in the church. (See Dave Johnson's reflections on pp. 30-31.) Some were low-key volunteers, helping occasionally. Still others wanted no part of their minister partner's church life; some went so far as to attend worship services in other faith communities.

During more than 30 years, UUMPs members have kept a low profile. We met informally at GA, have had a newsletter and now have an online chat (www.uumps.org) that is generally silent until someone is making a big transition. Then support is there in a safe setting. During the very large transition of the minister's retirement the partner may still be working and not consider herself or himself ready to step down. We know the conversations and covenants in pp. 32-37) are just a starting point, but they are included to urge dialogue between the incoming minister and the retiring minister's partner. We urge partners to seek out other partners for support. No one else can fully understand our experience from the outside.

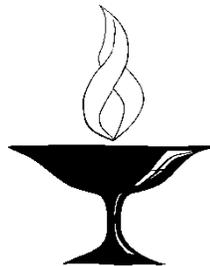
One Spouse's Story of Retirement Loss

I spoke with one minister's wife who shared that her self-esteem and worth became symbiotic with the performance of her minister husband. Because he was a respected and successful leader of the congregation, she basked in high self-esteem for years. However, after his retirement she became bitter, critical, judgmental and angry at and about anyone who occupied *any* pulpit who did not perform to her standards (at least as good or better than her spouse).

She would critique the speaker verbally to his or her face, criticizing anything she thought was inferior or inappropriate. With her loss of status and power, she used her knowledge of the details of ministry to reassert that power. Sadly, it was in a destructive and negative manner.

Her bitterness, rage and sadness were not her regular demeanor. She slowly became ashamed of her sharp tongue and knew she could have been much kinder in her critiques. After a time and the help of a therapist, she realized how entwined she was with her spouse's performance. Since she had this burst of insight, she can now sit through services and appreciate the words and demeanor of the presenter as any grateful congregant would. The "insider clergy knowledge" is not as important as it was in the beginning of retirement. Time has become a great healer and she has discovered new and different ways to distract herself from the ins and outs of a minister's expectations – mostly by participating in groups and activities which have nothing to do with the church. This way one Sunday service a week is more of a treat than a thorn in her side.

She has grown and is recovering still, two years after her husband's retirement. But be warned. If you are really a jerk and an insensitive clergy person who does not behave with integrity – she will find you and tell you the lay of the land, but with the dignity of a seasoned and loving Mrs. Emeritus!



Responses to Congregant Initiatives

Inevitably, former congregants will contact the retired/departed minister asking her or him to perform some sort of rite for themselves or a member of their family. All too often in refusing the retired/departed minister will refer the member to UUMA Guidelines noting that the guidelines prohibit this, or saying that the new settled or interim minister must invite them to participate. The first makes an adversary of the UUMA Guidelines rather than a safe boundary for the good of all. The second puts the settled or interim minister in an untenable position of incurring the displeasure of a congregant.

The best practice for the retired/departed minister is to refer all contacts to the interim or settled minister.

When someone wants a wedding, child dedication or memorial service, the retired/departed minister can certainly greet their former parishioner with a comment acknowledging their happy or sad situation. Then the retired/departed minister will ask the parishioner to be in contact with the minister who is now serving the church. Then the retired/departed minister can close with, “Best wishes/condolences to you.”

When your former parishioner says, “But we feel so much closer to you,” the appropriate response can be, “This is an opportunity to become closer to the new minister.” If the congregant says, “I don’t like the new minister,” remind them that not everyone liked you when you arrived (nor did you like everyone, at first); still you did their rites.

When deaths, emergencies, or troubles come to your attention, speedily communicate such information to the interim minister or your successor so that they can follow up with the needed pastoral care.

Former Staff Members

After retiring or leaving, ministers will do best to refrain from interacting with the staff members who continue in service to the church. Such interaction can cause conflicted loyalty for the staff. It is hard not to be critical of changes or not to sympathize with staff members stressed about changes or by the different behavior of the new clergy. The staff’s loyalty must be to the new minister or ministers. If that cannot be accomplished, staff members should resign to make way for a staff member from whom the new minister can have loyalty. The departing minister ought not put a staff member in a difficult position by continuing contact.



Chapter Practices Regarding Retiring Ministers

Every UUMA chapter will be different, offer a unique culture and have its own set of relationships and customs around ministerial transitions. Given this reality, it may well be that powerful rituals of departure or of recognition for a minister's changing status may well already be in place. The intent here is not to replace well-accepted and functioning practices, but to encourage those Chapters that are not currently offering a ritual moment for recognizing a retiring UU minister in the Chapter to begin doing so.

Whether a minister has been present in a UUMA chapter for one year or for thirty, the dignity of the office deserves taking a moment to recognize the transition from active minister to whatever form of retirement a minister might be choosing. Here are a few suggestions:

1. It may be as simple as reporting to the colleagues at the district UUMA chapter check-in that one is moving into retirement and may also be departing the district. In some chapters, the end of the annual retreat includes a business meeting and a closing worship. This can be a time for recognizing those who are newly arrived and acknowledging those who will be departing for new settlements and those beginning their retirement. Small gifts might be offered then.
2. In some larger districts, UUMA cluster meetings are more frequent and relationships within them deeper and more connected than at the larger district level. In such cases, the smaller size may allow for more intimate rituals of departure. Having one of the Cluster ministers closest to the departing or retiring minister acknowledge his or her gifts can be very meaningful. Taking time to note what they will be letting go of and moving toward can be very healing for all concerned.
3. Any departure has elements of both grief and joy. It can be like a death. Some families or congregations will choose to not have a memorial service or funeral at the time of a member's death. This may leave a hole that ritual could have so powerfully filled. Ministers can hone the practices of good self-care and caring for one another. We hope you will take time to have a ritual of departure or of transition for our UUMA colleagues moving into retirement.



Installation of Newly-Settled Minister With Inclusion of Retiring Minister

The Installation of a newly-settled minister is the beginning of a new chapter in the life of the congregation and in the life of the serving minister. How the Ritual of Installation takes place and what it looks like should be solely the business and choice of the newly-settled minister in conjunction with the congregation.

The Installation is a celebration of ministry as a calling and not just the newly-settled minister. It is a chance for the congregation to celebrate all of its ministry, both lay and professional, and its history of distinguished service to the community. This is a unique opportunity to include a retiring minister, especially if the retiring minister is to be an emeritus/a minister for the congregation.

The retiring minister is not and should not be the focus of attention. This is *not* the time to affirm the new covenant between the newly-settled minister and the former pastor or minister emeritus/a and the congregation. This is a time to celebrate the future of the congregation and its new minister. However, offering the former minister a chance to affirm the transition and the ministry of the newly-settled minister can be a gift to all concerned. A role for the retired minister might include robing and processing, offering the Right Hand of Fellowship or bringing greetings of some kind.



Minister Emeritus/Emerita Designation Policies & Procedures

The title of Minister Emeritus or Minister Emerita is granted to honor long and meritorious service to a congregation where the minister has given devoted and competent ministerial leadership. Due to our congregational polity, and more directly because the service has been to that particular congregation, only that congregation can bestow this title.

The procedure requires a vote of the congregation to confer minister emerita/emeritus status upon a minister. Normally this process begins with a suggestion by the congregation's Board of Trustees or by recommendation of a group within the congregation. We recommend that the action be taken by vote of the congregation as a whole during a formal meeting of the church membership. A formal resolution prepared for a congregational vote is one way to express the congregation's appreciation, and to create a permanent record of the decision. Consult your by-laws for specific requirements for a congregational vote.

The Unitarian Universalist Association (UUA) Bylaws grant a vote at General Assembly to ministers emeriti/ae. Article IV, Section 4. 8 (b) states:

Ministerial Delegates and Religious Education Director Delegates. Each certified member society is also entitled to be represented at each General Assembly by the ordained minister or ministers in full or associate ministerial fellowship with the Association settled in such society, and by any minister emeritus or minister emerita of such society in ministerial fellowship with the Association designated as such by a vote at a meeting of the member society not less than six months prior to the General Assembly, provided that such minister has been settled previously in such society, and by the director of religious education who is accredited by the Association and employed in such society.

The ceremony to confer this tribute is usually a simple one in which a citation is given with a statement expressing the wish of the congregation to confer the title of Minister Emeritus or Minister Emerita. Since this is an honorary title, the occasion is usually an informal one unlike the formal ceremonies of ordination or installation. The style of ceremony varies, from one woven into the Sunday morning service, to a planned Sunday afternoon gathering with a reception for the minister's family, congregation and guests. You may wish to invite a UUA representative to the ceremony. Contact invited guests as far in advance as possible.

A gift is traditionally given by the congregation. It may be a token of appreciation, but is often a rather substantial gift of funds that will be helpful to the minister.

Not only is it important for proper notation to be made in your church records, but it is equally important that you send the UUA a formal notice so the information can be entered into the minister's file record here at headquarters. This notification is vital both to the Ministries and Faith Development Staff Group and to the minister emeritus/emera. It ensures that he/she receives the UUA General Assembly delegate status credentialing through your congregation.

Other decisions you will want to make concern listing of minister emerita/us on church letterhead, directory, and in the congregation's listing in the UUA Directory. You might want to have a discussion of what relationship the minister emeritus/a will have with the congregation and with new ministers in the future. The Unitarian Universalist Ministers Association (UUMA) publishes Guidelines which define appropriate reciprocal relationships between settled and emeritae/i ministers. UUMA Guidelines explicitly state that the expectations of former ministers and retired ministers with former congregations apply whether the minister is emerita/us or not. The honorary title implies no financial relationship between a former minister and the congregation.

We hope this is helpful to you and your congregation.

Please send the name of honored minister, date the honor was officially bestowed and your congregation details to:

Director of Ministries and Faith Development
25 Beacon Street
Boston, MA 02108-2800

For more information contact mail to: mfdassistant@uua.org



Right Relations: How the Revs. Hopper and Luton Live in Respect, Peace and Love

The Revs. Peter Luton and Leon Hopper had the advantage of knowing each other before Peter succeeded Leon as minister of the East Shore Unitarian Church in Bellevue, Washington. Leon had known Peter as a seminarian preparing for the ministry, and they had worked together for several years on the UUMA Executive Committee during Leon's terms as President-Elect and President. Their history of collegial work helped them settle into a healthy and caring relationship.

When the Rev. C. Leon Hopper, Jr. retired from the congregation and from the active parish ministry, East Shore bestowed upon him the honorific title Minister Emeritus. For the next two years, he removed himself from all contact with the congregation. During that time the congregation worked with an interim minister and conducted a search for a new settled minister.

Peter contacted Leon before his pre-candidate visit and solicited his impressions and thoughts regarding the congregation. They did not interact during candidating week, but soon after Peter accepted the congregation's call, Leon contacted him to express both congratulations and his unconditional support for Peter and his ministry at East Shore. Leon clearly stated his desire and intention to participate in the life of the church only to the extent and in such a manner as Peter thought appropriate and helpful. Leon did, however, let Peter know of his strong hope that he would be able to continue his work with the church's Partner Church Ministry.

Soon after Peter's arrival in Bellevue, he and Leon got together and discussed the church and their relationship. They entered an intentional covenant of respect. Leon participated in Peter's installation. They read their covenant before the congregation as part of the Installation. This was to help the congregation understand the new roles and relationships both between the congregation and each minister and between the ministers. They reinforced that Leon truly was the minister emeritus and that Peter was the settled senior minister. Their covenant is included at the end of this document.

Their covenant has remained strong for almost 20 years! For his part, Peter seeks to include Leon in the life of the congregation. He has felt neither threatened nor judged by Leon. In fact Leon's presence, kindness and counsel have been invaluable throughout Peter's ministry.

And for his part, Leon has consistently deferred to the authority of Peter's call to serve as minister. Leon scrupulously avoids church politics. He attends services every Sunday. The congregation appreciates his presence and participation. Leon is invited to participate in celebrations of ministry (i.e., ordinations, installations) and special church anniversaries. He has accepted offers to preach on occasion, one year preaching in the morning on Christmas Eve Sunday, which made Peter's performance of three Christmas Eve Services manageable. He has graciously agreed to make pastoral visits to specific members. He has been a wise and excellent sounding board for Peter, but has never offered unsolicited advice or opinions. He has shared his experience and shown no hints of disappointment or dismay as the church has changed and evolved during Peter's ministry.

It should be noted that Leon extended the same courtesy, respect and welcome to the Rev. Joan Montagnes when she was called as Associate Minister. He and she have gone through a similar process of an explicit covenant and regular conversation.

Several factors go into this being such a healthy and satisfying relationship between colleagues.

The first factor is trust. Thanks to a history of trust and cooperation prior to coming together at East Shore, Peter and Leon did not have to earn each other's trust. Their words and actions, however, always seek to be worthy of the trust they have in each other.

The second factor is open and regular communication. They see each other most every Sunday, and though they do not often have time for significant conversations on Sunday, the regularity of their contact makes deeper and potentially difficult conversations possible. They understand each other and do not have to continually struggle to hear what the other is saying.

The third factor is the congregation's appreciation for both ministers' gifts and roles. The congregation does not attempt to triangulate Leon into church politics. The congregation understands that Leon and Peter "have each other's back." This understanding has been made easier by East Shore and Leon ending their ministry together with deep appreciation and not acrimony.

A fourth factor is that, upon retirement, Leon continued several significant denominational activities and responsibilities beyond the parish. This active retirement enabled Leon to remain connected to ministerial colleagues and to the larger Unitarian Universalist movement, and so he did not experience retirement as a loss of both congregation and ministry.

The fifth factor is Leon and Peter genuinely enjoy and love each other.

The Heritage of Ministry

The Revs. Leon Hopper and Peter J. Luton

Leon:

Peter, colleague in the Unitarian Universalist ministry, this evening we stand here together to honor the special bond and covenant established between us – a relationship uniquely created by your call, settlement and covenant with this congregation.

I look forward with great delight to the strength, growth, power, integrity and the humor of your ministry here with this special community, and also to me and to my family.

This evening you and this beloved congregation have covenanted with each other to work and walk together, minister and congregation, to care for one another and for our world in the spirit of freedom, truth and love. Together you have entered into the creative relationship of ministry—a ministry together with this community and all its people.

Thirteen years ago, on an evening very similar to this one, this congregation and I forged a similar covenant. For eleven years I walked and worked and ministered with them. To serve here is a privilege and a challenge. In becoming Minister Emeritus, the covenant and relationship as minister ended.

Now in this service, by your act and the act of this community, we are called upon to honor another covenant wrought between us. My covenant is no longer with the congregation, but it is with you. It is to support you in your ministry here in whatever ways you may determine—to follow your lead, to encourage you in your hopes, to respond to your initiative and, above all—to stay out of your way.

This is a new covenant, and so in recognition of that and symbolic of the heritage we share together, I offer you two small gifts from my recent visit to the birthplace of the Unitarian faith in Transylvania.

The first a stole. May it be a reminder that freedom, tolerance and reason in religion is a fragile and precious heritage. And also a vibrant, blood-red embroidery—a continuous pattern reflective of the continuity of our faith with open flowers warmed by the sun of life.

May your ministry here be a blessing to us all. I look forward to many strong years of your ministry to me.

Peter:

Leon, I am moved and honored really beyond my ability to say. I am blessed to have the opportunity to assume this pulpit which you have filled so well. Every minister knows that he or she exists not by the dint of personal efforts alone. We rely upon the strength and wisdom of the congregation we serve. We benefit from the trails blazed by colleagues who came before us. Your ministry here at East Shore makes my ministry here possible. Leon, I am so delighted that you are my colleague in residence. Thank you!

A Covenant Between Minister Emeritus and Interim Minister

Name of Retiring Minister, Senior Minister Emeritus
and
Name of Interim Minister, Interim Senior Minister
First Unitarian Universalist Congregation of *Anywhere*

The Retiring Minister (hereafter *RM*) has served this congregation as senior minister for (25) years and will continue to live in the “*Anywhere*” community with his spouse for the foreseeable future. We recognize that he knows many congregants well, and will remain in the consciousness of those and other members and friends. We recognize that this situation could impede the on-going ministry of the congregation; we also recognize that RM’s experience represents a special resource both for the interim ministry and for the new called ministry in the future. We both want the congregation to have a successful ministry now and in the future, and we promise to work together to this end as follows:

RM and Spouse will stay away from congregational activities during the interim period, and will prepare to arrange together with the newly called senior minister at a time to be determined according to that minister’s discretion.

All of the duties, responsibilities, and privileges of the senior minister now rest with Interim Minister Name (hereafter *IM*). RM has no duties, responsibilities, or privileges, *per se*, except having automatic delegate status at General Assembly, and having his name and emeritus status listed on the congregational letterhead and any other such institutional publications.

We pledge to be in continuing conversation about the impact of any potentially problematic interactions between RM and congregants or continuing staff. We will consult regularly and openly. We pledge to avoid any potential triangulation that might present itself, whether publicly or privately, from our respective relationships with congregants or staff.

RM pledges to be available to IM for private counsel about the congregation, its history, and congregants. IM is under no obligation either to seek or heed RM’s counsel on any particular matters.

We agree to treat Rites of Passage as follows:

IM is responsible for the well-being of the congregation, rites of passage, and other religious ceremonies that are part of congregational life.

If RM receives requests for involvement in such ceremonies from congregants, former congregants, or their children, he will direct them to IM. Whether or not RM does the entire service, has some part in it, or has no part at all, will be the result of mutual discussion that has the overall health of the congregation in mind, as well as IM’s leadership role and pastoral authority.

In the case of non-UU people from the wider community, in most cases RM will be free to perform weddings, memorial services, and other rites of passage at his own discretion, including collecting fees for his services. However, if he senses at any time that any such arrangement might somehow impact the congregation, he will consult with IM.

We anticipate that probably the most difficult situations may be those in which people RM has known for a long time are in trouble or ill, or otherwise in critical need of pastoral care. It may be as difficult for RM as it is for them, to distinguish a pastoral contact from the contact of a friend. RM pledges not to replace IM or interfere with the pastoral role in any way. IM pledges to be compassionately understanding about such situations and to share her perspective with RM.

In summary, RM pledges that whenever his personal relationships with UUs become apparent requests to become their minister, even in an informal friendly way, he will consult with IM on the matter. IM pledges, in turn, to give appropriate consideration to the fact that, to some persons RM will always be their minister. IM further pledges to assist RM in dealing with such a situation while at the same time exercising due regard for the general health of the congregation and for her own proper relationship with congregants and staff.

Signature Retired Minister

Date

Signature Interim Minister

Date



The Role of the Emeritus Minister in Residence

Within a few months, this society expects to be starting the process of building a viable and lasting union with a newly settled minister. To demonstrate that we look to him or her for parish leadership rather than to our minister of the past thirty-five years will require a rapid shift in attitude and behavior on our part.

A critical factor that can either hinder or further this process will be the presence among us of our former minister, Max Gaebler. Like many of us who have retired, he and his wife, after this year's absence, plan to go on living in the community where they have spent the greater part of their adult lives. They wish to continue in community activities in Madison and as members of this Society, which he joined immediately upon retiring as parish minister.

Experienced representatives of our denomination – and of others – have warned us that similar situations have often led to serious difficulties for the parish and the new minister. That this need not be the case is recognized in the 1985 revised guidelines of our Ministerial Association. “Where they are welcomed and constructive the services of ministers emeritus have proved of great value to the minister and the members of the congregation. In these instances, the transition has been effectively achieved and complementary ministry begun.”

To attain this requires careful thought before problems arise. Our former minister began the discussion of this matter more than a year before he retired and we have discussed it with numerous denominational representatives. We believe that guidelines should be based on recognition not only of potential liabilities but all of potential assets, and that we must think not only in generalizations but in terms of the particular situation. It is our conviction that in *this* church, *this* emeritus minister can be a very valuable asset to the new minister and the congregation – provided that his defined role is understood and accepted in practice by all of us.

The Role of the Emeritus Minister as Member of the Congregation

Our former minister carries a rich store of information on the history and traditions of this parish, but does not assume that such knowledge of the past justifies opposition to change. We know that in the organization and governance of the parish his interest was not in the exercise of power, but rather, by word and deed, to lessen the spirit of faction.

If any member or members find themselves in disagreement with the new minister they should not look to the emeritus minister to present their views. If any do ask him, Max Gaebler writes, he will refuse and urge them to talk to the minister directly, or with the appropriate lay officer or committee. We are confident that the minister will find our minister emeritus a loyal and supportive member of the congregation.

The Role of the Emeritus Minister as Minister Without Office

Because the minister emeritus continues to be qualified to perform ministerial functions, he can be a useful adjunct to the ministerial staff, serving in manner and degree to be determined by the parish minister. As Rev. Gaebler has written: “I shall be prepared to be useful in ways that my successor may request, consistent with such other commitments as I may undertake, and with my energy level; but any such services for the church will be solely at the request of my successor and of no one else.” We would suppose these services might include any of the following:

1. The minister would find in the emeritus minister, we believe, a valuable and discreet source of counsel given only on request and without presumption that it should be followed.
2. The parish minister may at times find it helpful to invite the minister emeritus to participate in a service conducted by the parish minister – or in case of need – to substitute for him or her.
3. In the case of services celebrating “life passages” – dedication of children, weddings or memorial services – participation by the familiar former minister in a service *conducted* by the parish minister may be expected to further the goal of establishing family bonds with the new minister. Requests of family members are therefore to be addressed not to the minister emeritus, but to the parish minister, who will determine the arrangements.
4. In case the new parish minister finds that our predictions are not working out in practice – whether in respect to relations with the minister emeritus or with members of the congregation – he or she will have the lay committee on Ministerial Relations with whom to discuss the problem. On this possibility Mr. Gaebler adds: “I would hope that my successor would feel completely free to speak to me first about any problems he or she might be experiencing with respect to my role in the church; I would do my utmost to be responsive to any concern thus raised, whether it involved reducing or changing that role.”
5. Mr. Gaebler summarized his own purpose in the following statement: “My greatest satisfaction will be in my successor’s success, and I want to do everything in my power to assist in the attainment of that goal.”

Right Relations

The goal in any transition is a whole, functioning, vital church. Whatever contributes to that should be encouraged; whatever does not should be changed. This is, of course, difficult to put into practice

in the real and complicated world of ministerial transitions. New ministers (interim and settled, associate and assistant) can find in the pews former ministers of the church, emeritus clergy, related community ministers and unrelated ones, chaplains, former ministers of other UU congregations, and other denominations (some looking to speak in a new voice), former DREs and MREs, former UUA officials, and more. They can also find partners, ex-partners and surviving partners of any and all of the above, some of whom may continue as church organist, Religious education director, church secretary, committee chairss, archivists, lead figures in the women's group, the church choir, the hospitality team, small group ministry, and more. In some congregations there is a whole constellation of these, sometimes difficult to sort out even if the ministry is stable. When the settled minister changes, the whole constellation of relationships and understandings has to be thoughtfully and compassionately re-formed. The retirees bear responsibility to seek new or renewed understandings.

The UUMA Guidelines suggest that there be a hiatus in connection with the church immediately following a ministerial retirement and until a "permanent" successor is settled – but this applies to only circumstances where that "absent" time should be extended for the good of the congregation and other times and places where it is completely unnecessary. There is no single set of rules that can or should apply to every situation. And no set of rules has ever been suggested to apply to partners and survivors, nor is there any mechanism whereby any standards could be enforced. Much of what the UUMA hope are "good practices" ultimately depend on the good will, good sense and cooperation of all parties (whether Good Offices are involved or not) And, in truth, most of the time everyone is trying to live helpfully and cooperatively and there are no serious problems.

Ministerial "horror stories" are most commonly centered on spouses and widows. We have seen the spouse or widow who continues to live in all or some of the parsonage, who continues to be church organist, secretary, a controlling presence to advanced old age. We have seen the widow who dutifully cares for the spouse's "legacy" and forcefully counters any ill word spoken. We have seen the spouse – like Judith Sargeant Murray who, following a sermon by Hosea Ballou in her church, had an announcement made that this was *not* the faith normally preached in that pulpit – to which Ballou strongly assented. Ministerial spouses are often centers of great power, usually informal, in our churches. The spouse is not the retiree. Does she or he have to give up the stature, standing, friendships, longstanding relationships, just because the spouse retires? This is a subject for conversation with the new settled minister.

The other side of the coin is also clear. The widow or widower may lead a lonely, cut-off existence in the same town because they feel they aren't supposed to attend church. The survivor may suffer serious illness and loss, and people of the church feel reluctant to reach out to her/him, and ask other church people to help for fear the settled minister might not understand. There can be a terrible loss of place and connection. I suspect, too, we have all seen widows of retired ministers of great standing and stature – left alone far from home and ignored by the settled minister and the congregation in a new church and town. So many feel awkward in asking for attention.

In some churches a caring team keeps close watch on the frail retirees and/or partners, sometimes without the knowledge or involvement of the SM (settled minister). Retired ministers widely report strong support from other retired ministers and partners. What is missing is often the open communication between the retired and the SM or IM (interim minister). The responsibility for this

communication resides on both sides. Whether it results in a covenant, agreement or just better understanding, it is essential!

Having said all of this, it is clear that most retirees and spouses understand the wisdom of the UUMA Guidelines, and keep a respectful distance from the former congregation – as appropriate during transitions, sometimes through several troubled ministries. Many counsel candidates for their former pulpit, warning of pitfalls and problematic patterns of congregational life, and even provide a list of “toxic members” – sometimes. This can be very helpful if it is done – respectful of all parties. Most talk with the successor minister about appropriate levels of their involvement and hold clearly to the understandings they reach. Often the BFM (beloved former minister) knows before the SM when the SM is in trouble with the congregation and keeps a respectful distance, regardless of agreements. Most, when aware of problems with successors, are open with offers to help if and as appropriate. Most, especially those who settle in other places, are amazing resources to the SM, who can and does regularly reach out to them. In our churches some do workshops, lead small ministry groups, adult education classes, occasional preaching and more.

But we all know SMs who reject absolutely any participation in congregational life by a BFM, and make spouses of the same most unwelcome. We know ministers who refuse to allow a BFM to participate in any way in the funerals of a long-loved parishioner, or even to officiate at another UU church in town at the funeral of a non-parishioner. We know too many who would never think of calling on a ministerial retiree, BFM or not, partner or survivor, even in a desperate situation, or final illness. This is often a break of collegiality we claim and should embody. On the other side there are the BFMs who continue in ministries (interim, contract, etc.) not far from former churches, and allow former parishioners to “charge their spiritual batteries” there without “calling them” on their needed presence and support in the former church. Some BFMs continue parish calling, weddings, funerals, even help create alternate congregations in town. These seem cases for Good Offices, but they may not always have to be. I know of one case where the SM simply and without any comment let the misbehavior die out – which it did in a year or so. The congregation knew this behavior was inappropriate and made it clear to the BFM that it should stop, and it did. It is very healthy for a congregation to quietly deal with such issues. Members ministered to the BFM and spouse in their final illnesses with the blessing and support of the SM.

Everything depends on the good will, good sense and cooperation of all parties. As the UUMA Guidelines clearly suggest, early and clear conversation and covenants between BFMs and settled minister are critical and are amendable and changeable as needed. But what about partners and surviving partners? I would hope that a like process would be used between them and newly-settled ministers. The old ministerial understanding that every staff member’s resignation would be on the new minister’s desk for him or her to accept or refuse when they arrived is dead and well so. Spouses and widows of predecessor who hold important places and positions in the church should seek new or renewed understandings of their roles with the new SM.

Retired Minister and Settled Minister

Ministry-Building Tool

Preparation

Settled Minister (SM) requests conversation with Retired Minister (RM).

“The UU Ministers Association and the UU Retired Ministers & Partners Association request that we meet to explore how our relationship might best serve the health of our church's ministry.”

“To help us, the UUMA Retired Ministers Task Force has developed a suggested Conversation Guide and Covenant Template.”

Conversation Guide

1. Explore Your Past Experiences of Comparable Relationships

SM: Have you been in my shoes before, as settled congregational minister with a retired minister among your constituents/colleagues in the congregation? How would you describe the congregational role of the retired minister? Did you experience that situation bringing particular contributions or challenges to the congregation's ministry?

As a retired minister, have you already had the experience of being a constituent/colleague in a congregation served by a settled minister? Do you feel it brought particular contributions or challenges to the congregation's ministry?

RM: As a settled minister (or minister-in-training), have you ever before had a retired minister among your constituents/colleagues in the congregation? How would you describe the congregational role of the retired minister in those situations? Did you experience that situation bringing particular contributions or challenges to the congregation's ministry?

2. Explore Your Perceptions of Your Possible Future Relationship

SM: Do you see your identity as retired minister offering particular *gifts* to the ministry of our church?

RM: Do you see my identity as retired minister offering particular *gifts* to the ministry of our church?

SM: Do you see your identity as retired minister offering particular *challenges* for the ministry of our church?

RM: Do you see my identity as retired minister offering particular *challenges* for the ministry of our church?

SM: In your role as retired minister, do you have particular desires for your church relationship with me as settled minister?

RM: In your role as settled minister, do you have particular desires for your church relationship with me as retired minister?

3. Explore Forming a Covenant for Your Relationship

The UUMA Retired Ministers Task Force's draft template for a written covenant is intended to help the settled minister and retired minister to agree on:

- *Standards each minister can use to evaluate and guide his/her own behavior;*
- *Bases from which either minister can open a conversation to explore questions/concerns about the other's behavior should they arise.*

SM/RM: What are our feelings about entering into a written covenant?

SM/RM: What improvements or additions to this template would we like to consider for our covenant?

SM/RM: Would the church's ministry benefit from involving our own life partners in our covenanting conversation?

Covenant Template

1. We acknowledge that the identity of retired minister is a unique and often significant factor in creating a person's role in a congregation. In our situation, we acknowledge that (RM)'s prior role in this congregation as settled minister adds further weight to his/her role in our congregation.

2. We covenant to guide our actions as retired minister and settled minister by the values UU congregations covenant to affirm and promote in the UU Association's Statement of Principles. The test we will apply in considering action will be: "How can we best act to assist our congregation to vibrantly embody UU values?"

3. We covenant to decline participation in, and remove ourselves from, conversations with church constituents (other than our own life partners) which evaluate each other's ministries or contributions to church life.

4. We covenant that (RM), as retired minister, will inform (SM) of any circumstances which seem to call for the settled minister's attention, while neither expressing nor creating any expectation regarding his/her response.

We covenant that (SM), as settled minister, will inform (RM) of any church circumstances which s/he feels would be served well by the retired minister's attention, while neither expressing nor creating any expectation regarding his/her response.

5. We covenant that (RM), as retired minister, will:

- provide no ministerial services within the congregation's "parish" and will undertake no leadership role in the congregation except as agreed in advance with (SM).
- defer responding to invitations to such service or leadership until such an agreement has been reached with (SM).

6. We covenant that (SM), as settled minister, will make every effort to ensure that the church receives maximum benefit from any service or leadership inclinations/invitations (RM name) may raise for their consideration.

Retired Minister's Partner and Settled Minister

Ministry-Building Tool

Preparation

Settled Minister (SM) requests conversation with the Retired Minister's Partner (RMP).
“The UU Ministers Association and the UU Retired Ministers & Partners Association request that we meet to explore how our relationship might best serve the health of our church's ministry.”

“To help us, the UUMA Retired Ministers Task Force has developed a suggested Conversation Guide and possible Covenant Template.”

Conversation Guide

1. Explore Your Past Experiences

SM: Would you tell me about your prior congregational experience as a minister's partner?

- In what congregational situations have you been a minister's partner?
- How would you describe your congregational role in each of these experiences?
 - What were its satisfactions? What were its challenges?

RMP: Would you tell me about your prior experience with ministers' partners in congregations where you've served as settled minister (including as minister-in-training).

- In what situations have you served as settled minister in congregations whose constituency has included a minister's partner?
- How would you describe the congregational role of the partners you experienced in these situations? Were there special gifts or challenges involved in their activity?

2. Explore Your Perceptions of Your Possible Future Relationship

SM: Do you see your identity as retired minister's partner offering particular gifts to the ministry of our church?

RMP: Do you see my identity as retired minister's partner offering particular gifts to the ministry of our church?

SM: Do you see your identity as retired minister's partner offering particular challenges for the ministry of our church?

RMP : Do you see my identity as retired minister's partner offering particular challenges for the ministry of our church?

SM: In your role as retired minister's partner, do you have particular desires for your church relationship with me as settled minister?

RMP: In your role as settled minister, do you have particular desires for your church relationship with me as retired minister's partner?

3. Explore Forming a Covenant for Your Relationship

The UUMA Retired Ministers Task Force's draft template for a written covenant is intended to help the Settled Minister and Retired Minister's Partner to agree on:

- *Standards each can use to evaluate and guide his/her own behavior;*
- *Bases from which either can open a conversation to explore questions or concerns about the other's behavior should they arise.*

SM/RMP: What are our feelings about entering into a written covenant?

SM/RMP: Are there improvements or additions to this template we would like to consider for our covenant?

SM/RMP: Would the church's ministry benefit from involving our own life partners in our covenanting conversation?

Covenant Template

1. We acknowledge that the identity of retired minister's partner is a unique and often significant factor in creating a person's role in a congregation. [In our situation, we acknowledge that (RMP)'s prior role in this congregation as settled minister's partner adds further weight to his/her role in our congregation.]

2. We covenant to guide our actions as retired minister's partner and settled minister by the values UU congregations covenant to affirm and promote in the UU Association's Statement of Principles. The test we will apply in considering action will be: "How can we best act to assist our congregation to vibrantly embody UU values?"

3. We covenant to decline participation in, and remove ourselves from, conversations with church constituents (other than our own life partners) which evaluate each other's contributions to church life.

4. We covenant that (RMP), as retired minister's partner, will inform (SM) of any circumstances which seem to call for the settled minister's attention, while neither expressing nor creating any expectation regarding his/her response.

We covenant that (SM), as settled minister, will inform (RMP) of any church circumstances which s/he feels would be well-served by the retired minister's partner's attention, while neither expressing nor creating any expectation regarding his/her response.

5. We covenant that (RMP), as retired minister's partner, will:

- undertake no leadership role in the congregation except as agreed in advance with (SM).
- defer responding to invitations to leadership until such an agreement has been reached with (SM).

6. We covenant that (SM), as settled minister, will make every effort to ensure that the church receives maximum benefit from any leadership inclinations/invitations (RMP) may raise for their consideration.

Methodology of UUMA Task Force on Retired Ministers

Methodology

Our early work was conducted via conference calls. Most through most of 2012, we met monthly for up to two hour by conference call. July 24-26, 2012 we met in Bellevue, WA. We created a task force covenant, and identified types of difficult situations. We identified resources from other denominations. We used the UUMA web site, creating a space where we could post meeting agendas, notes, and resources. We worked in teams of two to produce descriptions of best practices. A Collegial Conversation devoted to the work of the Task Force was held at UUMA Professional Days, at the Phoenix General Assembly, with 12 colleagues attending. We will get feedback from the UURMaPA gathering in Attleboro, MA October 2-4, 2012.

In the belief that good work among us would be enhanced by sharing a covenant, the Retired Ministers Task Force developed the following:

Preamble

A covenant is a promise and promises matter. Making a covenant is a profound and religious act. It is a statement of intention. Of course, no one of us is perfect and we will at times fall short of our hopes and aspirations. Mistakes happen.

With that in mind, if one of us believes a member of our UUMA Retired Ministers Task Force *is* not living up to our working covenant, we will take responsibility for bringing the concern to the person's attention. If for some reason we do not feel heard or do not feel as if our concern has been addressed, we will involve another member of our working group to mediate. This should resolve the concern.

If it is clear that a member of the UUMA Retired Ministers Task Force cannot live within the covenant, as evidenced by repeatedly ignoring or acting contrary to its intent, they will be asked to remove themselves from the group - by the Chair, with the full knowledge and consent of the Task Force.

Covenant

Mindful of our Unitarian Universalist principles and the values we share, we will keep the principles of Unitarian Universalism active in our relationships and ask that we be held accountable to them.

In the spirit of cultivating right relations, we promise to trust each other's inclinations and intentions, and to deserve each other's trust.

We covenant to work collaboratively,
To talk through issues with appreciative listening,
To speak with one voice to the UUMA, UURMaPA, UUIMG and the UUA.

We value equally relationship, process and task.
We see leadership and team work as a spiritual practice.

We will regularly take time for check-ins, appreciation, clearing and apologies.

We will recognize one another as equals in our work, and
Actively seek to engage one another in our discussions and decision-making.

We will honor confidentiality in our meetings.
While we may talk in generalities of our discussion with others,
We will not speak with others the details of who said what.

*Our sincere thanks to Bill Hamilton-Holway for documenting
our conversations these past ten months.*



*L-R: Mary Hnottavange-Telleen, John Robinson, Bill Hamilton-Holway, Peter Luton,
Fritz Hudson, Jim Eller, Chris Backus (not pictured: Keith Kron)
East Shore Unitarian Church, Bellevue, WA, July 2012*

Footnotes

- Pages 1-6: Overviewteam report edited by Bill Hamilton-Holway
- Pages 7-10: Settled & Retired Ministers.....prepared by Peter Luton
- Pages 11-12: Interim Period.....Mary Hnottavange-Telleen
- Page 12: Temptation.....John Robinson
- Pages 13: Emeritus/a Ministers, Ministry of Absence.....Chris Lilly Backus
- Page 14: Staying Away (Ruppert Lovely).....Hilary Krivchena
- Page 15: Retiring Well.....John Robinson
- Page 16: Leaving a Church, Partner's Role.....Chris Lilly Backus
- Page 17: One Spouse's Story.....Diane Weber
- Page 18: Congregant Initiatives, Church Staff.....John Robinson
- Pages 19-20: Chapter Practices, Installation.....Jim Eller
- Pages 21-22: Ministers Emeritus/aUUA Website, updated August 18, 2011
- Pages 23-25: Minister Emeritus and Settled Minister.....Leon Hopper & Peter Luton
- Pages 26-27 Covenant between Interim and Retired Minister.....Mary Hnottavange-Telleen
- Pages 28-29: Emeritus (Max Gaebler).....Ministerial Relations Committee
First Unitarian Church, Madison, WI
- Pages 30-31: Right Relations.....David A. Johnson
- Pages 32-37: Conversations and Covenants.....Fritz Hudson
- Pages 38-39: Task Force Methodology..... edited by Bill Hamilton-Holway

*We thank Chris Backus for formatting and editing this document.
Thanks to Missy Poirier for proofreading.*