



Guidelines for Committees on Staff/Pastor-Parish Relations and Clergy Regarding  
**TRANSITION OF CLERGY LEADERSHIP**

(also known as a pastoral move)

Section 1: Retiree Moving Policies/Procedures

Section 2: The facts and figures for clergy moves

Section 3: Some information and guidance around the transition.

## **SECTION ONE - RETIREES** **RETIREMENT MOVING POLICY**

for Clergy of the Upper New York Conference

Approved by Conference Board of Pension & Health Benefits 1/18/2011

**WHO MAKE ARRANGEMENTS FOR A RETIREMENT MOVE?** The retiree is required to secure two bids which are to be sent to the Benefits Officer. The Benefits Officer will issue a purchase order to the carrier based on the grant (see below). The retiree can then follow through on final arrangements.

**WHO MOVES THE RETIREE?** A licenses carrier whose costs will include replacement cost insurance coverage. While not recommended, a retiree may move themselves but in these cases, the retiree will pay all related expenses and submit receipts to be considered for reimbursement.

**WHAT IS INCLUDED IN A FUNDED RETIREMENT MOVE?** Reasonable household furnishings and library are included. Retiree is to pay for moving extensive material considered hobbies, collectibles or separate business items. Second cars, recreational vehicles and utility trailers are the responsibility of the retiree. Questionable items should be discussed with the Benefits Officer.

**WHO PACKS?** The retiree, except for those items the carrier is required to pack under insurance regulations (i.e. mirrors, mattresses, marble tops, etc.). Packing supplies may be provided by the mover. The retiree may negotiate with the carrier for the carrier to do additional packing, with the retiree responsible for any such added costs.

**WHO PAYS?** The Conference Board of Pension & Health Benefits will pay for one retirement move for clergy members who are retiring from a local church appointment or conference staff appointment, according to the approved schedule (see below). The retirement move shall occur one year prior to retirement or up to two years after retirement. Any variation from the schedule must be recommended by the District Superintendent and approved by the Conference Board.

The Benefits Officer will issue a purchase order to the carrier for the amount of the grant, or the estimated costs, whichever is less. If the estimated cost of the move is more than the grant, the retiree is directly responsible to the carrier for the balance due.

For each year of service in the Upper New York Conference (and four former conferences), 3% of the following amounts will be paid toward the retirement move:

Full time (at time of retirement)	\$3,000 (\$90 per year of service)
Three-quarter time	\$2,250 (\$67.50 per year of service)
Half time	\$1,500 (\$45 per year of service)

## **SECTION TWO -FACTS/POLICIES FOR CLERGY MOVES**

### 1. **Clergy Moves**

#### A. **Clergy changing appointments:**

In most cases the receiving churches/charge will pay for the moving expenses of the incoming pastor. Items from the church office, where possible should be moved to the parsonage if they are to be included in the move, otherwise the pastor can move those items themselves.

The pastor is required to obtain two (2) estimates for the cost of the move. The following will be paid for by the receiving church:

- ★ Reasonable household furnishings and library are included.
- ★ The pastor is to pay for moving extensive material considered hobbies, collectibles or separate business items. Second cars, recreational vehicles and utility trailers are the responsibility of the pastor.
- ★ The loading and unloading of the truck
- ★ Taking apart beds, frames, etc. for the move and re-assembling them upon arrival.
- ★ The pastor is responsible for packing all items in preparation for the move. The exception would be those items the carrier is required to pack under insurance regulations (i.e. mirrors, mattresses, marble tops, etc.).

The church is NOT financially responsible for packing or unpacking of boxes, or packing supplies. If the pastor desires these services they will be paid for separately by the pastor.

The pastor and the receiving chair of S/PPRC will discuss the choices, make the decision and determine how the receiving church will have payment ready upon arrival of the movers.

The moving company chosen will provide a signed contract indicating **PRICE NOT TO EXCEED** estimate.

The moving company needs to **fix their price** prior to the move taking into consideration the distance and estimated weight/boxes of the clergy family belongings.

2. **Conference Extension Moves:** Moving expenses for persons appointed/hired to extension appointments where the conference pays their compensation (District Superintendents/Executive Staff )will have their moving expenses paid by the Annual Conference. Please get instructions for bids and payment from the Pension and Benefits office at UNYAC Office

### **Conference assistance for high frequency moves**

1. If receiving congregation's pastor has three years in their current appointment, the receiving church will pay 100% of the moving costs.
2. If the receiving congregation has had a change of pastors where moving expenses have been incurred, in the previous two years, the conference will reimburse the receiving congregation \$500 for moving expenses, pending receipts arriving at the conference office within 30 days.
3. If the receiving church has experienced an appointment change where moving expenses have been incurred, in the last 12 months, the Annual Conference will reimburse the receiving church \$1,000, pending receipts arriving at the conference office within 30 days.
4. If the pastor is moving to the Upper New York Annual Conference from outside of the conference boundaries, the receiving church is responsible for the move once inside the conference boundaries. Any costs incurred in getting to the Annual Conference are to be paid by the pastor.

5. Some pastors are willing to allow volunteers to move them. However, the pastor makes this decision, herself/himself and this is not expected to be the norm for clergy moves. Churches cannot ask or insist that volunteers be used in the move.

### **Practical Issues of Pastoral Transitions**

*Each clergy person must "own" her/his or own responsibility for the move. If the pastor has made him or herself available for a change in appointment, this needs to be shared fully with the S/PPRC and the congregation she or he is leaving*

### **The date of official transition is July 1.**

Salary, pension, reimbursement is paid through the month of June. Health insurance is continued as a church expense where clergy serve full time, unrelated to the person in the appointment, so that expense is continued on an ongoing basis and there is no change with the change in pastor.

### **Moving can be accomplished in the week before and the week after July 1.**

Pastors need to move as soon as the parsonage they are going into is vacant. Remember, there is probably a pastor waiting for you to vacate your parsonage so that she/he can move. There are probably other pastors affected in the line behind the pastor following you.

The incoming pastor's move should not be held up by painting, etc. as inconvenient as that might be. In the event that major work must be done in the parsonage to make it liveable, temporary living arrangements for the pastor and family must be made, at the expense of the receiving church(es).

**The parsonage is the property of the church, but it is the home of the pastor and his or her family.**

The church has the obligation to keep the parsonage in good condition.

The tastes of the parsonage family, age of children, etc. should be kept in mind if any decorating decisions are being made in between pastors.

**The parsonage family is responsible for having the parsonage "broom clean" which means that all belongings, trash, etc. is removed and all rooms have been at least swept/vacuumed.**

**If damage has occurred in the parsonage which is beyond normal wear and tear, the parsonage family is responsible for repairing or paying for the necessary repair. If necessary, the District Superintendent is called in to negotiate such an issue**

**Cleaning of carpets, windows, etc. is the responsibility of the church.**

*A caring way to send your parsonage family off is to help with whatever **they might need** during the transition ~ meals, help with packing or cleaning and preparation of the parsonage for the next family.*

**Pastors: Leave for your successor:**

- ✓ Keys, well identified, to church and parsonage, garage door openers, appliance information. No one in the departing parsonage family should take keys to the church or the parsonage with them.
- ✓ An up to date membership list, with contact information.
- ✓ A list of persons in the hospital during the transition.
- ✓ A list of shut-ins and others needing special attention.
- ✓ A list of persons to contact about parsonage concerns, ie, appliance repair, trash removal, etc.
- ✓ A list of names and contact information for the leadership of the church.

Leave the ministry and administration of the church and condition of the parsonage in the best condition possible--the way you want to receive the congregation and parsonage you are moving to. If we each

leave our homes a little better, a little more loved--then they will continue to be good places for any who walk behind us.

**Section Three**

**Important Information and Guidance for the Move**

**ANNOUNCEMENT OF THE INTENDED NEW APPOINTMENT IS MADE IN BOTH CHURCHES AT THE SAME TIME. THE DATE FOR THIS ANNOUNCEMENT IS COORDINATED BY SENDING AND RECEIVING DISTRICT SUPERINTENDENTS.**

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**The Committee on Staff/Pastor Parish Relations has the responsibility of teaching the congregation about the issues of pastoral leadership.**

This is particularly important during the time of transition. An article or series of articles in the church newsletter alerting members of the congregation to the emotions and issues of a pastoral transition might be helpful.

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**There is a grief process** on the part of both the clergy and the members of the congregation where a pastor is leaving. This is true even if the relationship between the pastor and the congregation has been less than ideal.

*In the time between the announcement of leaving and the actual leaving, the transition and its issues need to be talked about openly.*

**Clergy should not put off saying good-bye.** *Clergy should not act as if nothing has changed. Something is changing in the congregations involved and in the lives of the pastors involved in the transition. This needs to be acknowledged and worked with.*

**A congregation(s)-wide farewell event needs to be held.** *Please make sure that this event is scheduled with the pastor and family in mind.*

**A ritual of transition during the final worship for the departing pastor and also for the incoming pastor is an excellent idea.**

*This would involve a time of saying goodbye to the current pastor, a blessing of transition for both the congregation and the pastor. This would also be true when the new pastor arrives and begins leading worship. There is a service in the book of worship for welcoming a new pastor.*

**The grieving process does not end with the actual departure of the pastor.**

*The grieving goes on and affects the relationship with the new pastor. The new pastor has also just said goodbye to a congregation and is experiencing some grief in the transition. Both the congregation and the pastor need to be aware that these dynamics are present.*

**When pastoral transitions take place there are transitions in the leadership of the congregation.**

*Most of these transitions are the result of the conscious or unconscious decision of laity to step back from responsibility in the congregation.*

**Pastors have different styles of leadership and congregations have different personalities.**

*Pastors and S/PPRC need to be aware that these are normal issues of transition. **The new pastor is not expected to be a clone of the former pastor.** The new pastor cannot be expected to resolve all of the transitional feelings in the congregation. All are encouraged to be good listeners and respect the transition.*