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Bishop Retirement Guidelines

Lancaster Mennonite Conference

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Adopted as a working document

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May 24, 2013

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Introduction

16 The following document attempts to outline direction for bishops who are approaching
17 retirement, providing guidelines to assist them in a healthy retirement process. The initiative
18 for such a document originated with a Bishop Board meeting in October 21, 2011 that was held
19 at Landis Homes in order to address the needs of retiring and retired bishops. Several retired
20 bishops, including Donald Nauman, Ernie Hess, Freeman Miller, Edwin Ranck, and Frank Shirk,
21 served on a panel to share their retirement experiences.¹ This event clarified the interest of
22 bishops in being more intentional about their preparation for retirement, discernment about
23 when and how to retire, and issues faced in retirement.²

24 An initial meeting of these four retired bishops with Conrad Kanagy (LMC staff) generated a
25 series of questions and concerns, with all in agreement that more intentionality about bishop
26 retirement is critical. At the same time, no one individual from this group sensed a calling to
27 develop a task force or lead the group in addressing the needs of retiring and retired bishops. A
28 follow-up meeting with retired bishop Paul Nisly led to the development of an alternative
29 approach in which bishops who are approaching retirement would at the same time be
30 mentored by an already retired bishop, using a set of guidelines developed by the Lancaster
31 Mennonite Conference staff and retired bishops.

32 This document is the result of these conversations as well as vigorous conversations among
33 current and retired bishops as well as members of the Conference Executive Committee and is
34 meant to provide a framework for bishop retirement.³ This document has been written with a
35 recognition of Lancaster Mennonite Conference's history and current cultural and theological
36 diversity. No document will sufficiently represent the various ways that leadership has been or
37 is being carried out today—an effort has been made to make the document as flexible as
38 possible in order to be applicable regardless of context. For these and other reasons, this

¹ An early draft of this document was reviewed and substantial feedback given by the following persons: Edwin Ranck, Freeman Miller, Donald Nauman, Paul Nisly, Marcus Smucker, Keith Weaver, Dale Stoltzfus, and Frank Shirk. Later drafts were presented to the Bishop Board and Conference Executive Council, and these members provided additional feedback for the current draft.

² It is acknowledged that the word retirement does not fully reflect the transition that bishops and others make in stepping away from their role—the idea of “withdrawal” may be too strongly associated with the term. Other words may be more helpful in thinking through the implications of this transition such as “refocusing” or “redirecting.”

³ For guidelines for the retirement of credentialed leaders in Lancaster Conference see Appendix D. The assumption of bishops has been that these guidelines apply to their roles as well as to those of other credentialed leaders in LMC.

39 document will be reviewed by the Conference Executive Committee and the Bishop Board
40 within three years, and revisions made as necessary.

41 The discussions about bishop retirement over the months leading to the final draft of this
42 document began to go in two directions. On the one hand, questions of how a bishop retires
43 and how he finds support for retirement are ultimately “ministry” related questions, the
44 answers to which lie within the ongoing discernment of the Bishop Board. On the other hand,
45 questions about the roles of retired bishops are more “governance” in nature and lie within the
46 discernment of the Conference Executive Committee (not to the exclusion of the Bishop Board
47 of course). Among the second set of questions asked were:

- 48 • Should retired bishops attend Bishop Board meetings?
- 49 • Should retired bishops attend their former district meetings?
- 50 • How might retired bishops be used more effectively within LMC?
- 51 • What is the status of retired bishops who are later appointed to interim bishop roles,
52 such as occasionally occurs? Does this bishop have the full rights and privileges
53 accorded to any bishop?
- 54 • Should bishop terms be restricted to term limits, such as to a ten year term? Would this
55 lead to greater health in governance and ministry?

56 As greater complexity began to emerge in these conversations, it became clear that a two-part
57 document might be the best way to move forward with Part I addressing bishop retirement and
58 Part II the post-retirement role of bishops in LMC. As a result, the current documents attempts
59 to address both components, though there is necessarily some overlap of the two parts.

60 **Part I: The process of bishop retirement**

61 At and beyond the age of 65, bishops will be expected to have an annual review meeting with
62 the District Bishop Support Team to discuss the status and future of their ongoing ministry. It is
63 expected that a bishop will retire no later than the age of 70 years, but that regardless of the
64 age chosen, he announce his retirement in writing to the Chair of the Credentialing Commission
65 at least eighteen months in advance.⁴ Upon receiving written notice, the Chair of the
66 Credentialing Commission will schedule a pre-retirement meeting with the retiring bishop and
67 his spouse to discuss the retirement process. The Chair will also process the retirement

⁴ Any departure from the bishop role before the age of 65 years will be considered a resignation rather than retirement. But the expectations for a bishop’s role following retirement (as defined in Part II of this document) are expected to apply to both those who resign as well as those who retire. In other words, it is expected that the agreement found in Appendix B will be written with those who retire as well as those who resign and that the guidelines for involvement in the congregation, district and conference described in Part II will apply to those who resign as well as those who retire (regardless of whether the former bishop remains a part of Lancaster Mennonite Conference or Mennonite Church USA).

68 request with the Commission and assign a former bishop as a mentor for the retiring bishop.⁵
69 This mentor will use these guidelines as a framework for assisting the retiring bishop in making
70 appropriate plans for retirement and in helping that bishop to think through the important
71 details related to retirement. The mentor bishop will be accountable to the Credentialing
72 Commission, and will update the Commission quarterly as to the retiring bishop's progress
73 toward and into retirement.⁶ Appendix E provides a checklist of responsibilities and a
74 timeframe for walking through the bishop retirement process.

75 Some bishops may feel that these guidelines for care are somewhat intrusive or unnecessary. In
76 such cases, it will be up to the Chair of the Credentialing Commission and the mentor bishop to
77 discern how much and in what ways to be engaged with the retiring bishop.

78 Upon the assigning of a mentor bishop, the retiring bishop will complete a questionnaire
79 designed to address specific areas relevant to retirement (see Appendix A). The mentor and
80 retiring bishop should then discuss the questionnaire responses, and use these responses to
81 guide action steps, develop a timeline, and identify resources for the retirement process.
82 Relevant topics that the mentor and retiring bishop and spouse should address are noted
83 below. Some bishops may not sense the need to address each of these areas and the Mentor
84 bishop has the flexibility to make decisions about the extent to which each of these areas
85 receives focus.

86 **Spiritual care**

87 Bishops approach retirement having experienced a variety of spiritual dynamics during their
88 years of ministry. Some will be in need of healing and renewal. Some will need help to
89 realistically embrace the retirement experience spiritually and psychologically. Some will
90 struggle to not only be willing to let go of work but to find a spiritual fulfillment in doing so.
91 Related to this question of resigning oneself to God's purposes in retirement is the inevitable
92 diminishment that comes with aging and retirement and how to embrace this sense so that it
93 serves the bishop and others well rather than creating a profound sense of unresolved loss.
94 Given these various dynamics, it may be necessary for the bishop to be assigned a spiritual
95 director to assist him in moving from his bishop responsibilities to the various roles he will now
96 find himself in.

⁵ The mentor bishop will voluntarily offer his time without expectation of compensation. The role of a mentor may vary from retiring bishop to retiring bishop, since some bishops may sense that they already have adequate coaching or mentoring in place. At the same time, the mentor bishop is a way for the Credentialing Commission to stay in touch with the retiring bishop's transition and so even if the mentor bishop places a less central role in some cases, he should still be appointed to lead the transition process. The mentor bishop should provide the Credentialing Commission Chair with a brief quarterly update of the retiring bishop's progress toward retirement.

⁶ An alternative to a single mentor bishop would be a Bishop Support Team composed of a current bishop, former bishop, and counselor/coach.

97 **Physical health**

98 Bishops generally retire at a time when they are likely to have increased health concerns. It is
99 possible that some have not adequately attended to these concerns during the course of their
100 ministry, and it is important that the bishop approach retirement by taking time to assess the
101 quality of his health and to begin putting in place (if not already present) appropriate
102 preventative health measures. Actions such as scheduling a physical and age appropriate
103 testing are both important steps.

104 **Emotional/psychological well-being**

105 The psychological challenges of retirement are well-documented and have effects on physical
106 health, relationships, continued career plans and more. It would be wise for a retiring bishop to
107 assess his emotional well-being as he approaches retirement, and consider making an
108 appointment with a mental health provider to discuss the challenges and opportunities he
109 faces. Credentialed leaders of Lancaster Mennonite Conference are eligible to receive three
110 free LAP counseling sessions at Philhaven.⁷

111 A central question for most retirees has to do with their continued identity following
112 retirement. The question of “Who am I?” is typically part of the transition from the work-a-day
113 world to retirement. Our occupational roles tend to structure our time, are context for
114 conversation with others, occupy our minds when relaxing, and provide significant meaning.
115 The absence of such roles leads to questions such as “What meaningful contribution am I
116 making? Who are my friends? How should I schedule my time?” Waiting until retirement to
117 address such questions is waiting too long—the question of identity discovery should be part of
118 the journey toward retirement for every bishop.⁸

119 Besides identity, the opportunity to meaningfully assess one’s emotional well-being should help
120 to create space for grieving the loss one feels in saying goodbye to an identity, to colleagues, to
121 an office space, etc. Grief is a natural part of retirement for most persons, and acknowledging it
122 will aid in transitioning into retirement.

123 **Living arrangements**

⁷ An advantage to having a team rather than a single retired bishop as mentor is the possibility that this team could include a counselor or life coach. In addition, LMC may want to inquire about the possibility of extending LAP appointments for retired bishops.

⁸ Only in recent years have some become full-time bishops, representing several different districts. The question of identity may become even more critical as these full-time bishops face retirement, as compared to the historic pattern of part-time bishops who when they retired may have retained one or more alternative identities and roles that helped sustain them in their retirement transition.

124 Retirement may be an important time for a bishop and his spouse to think reflectively about
125 their current residential status. Perhaps it would be a timely opportunity to move into a
126 retirement setting or to downsize. Perhaps moving outside of the district where one served
127 would also be a helpful consideration. Whatever the case, retirement provides an opportunity
128 to address one’s long-term residential plans. While in some cases this may be wise, in other
129 cases, this question is complicated by the location of the retirement community of their choice
130 lying within their geographic area of service, by having recently moved closer to family who live
131 within their area of previous service, or by serving in a conference-wide or denomination-wide
132 capacity.

133 **Finances**

134 Throughout their lives, bishops will have been compensated by their congregations and districts
135 in a variety of different ways, and some are more prepared financially for retirement than
136 others. It is important that bishops are provided with financial guidance as they move toward
137 retirement, receiving financial counseling from professional financial planners. Just as Philhaven
138 may be able to provide counseling services, perhaps Everence could be asked to offer financial
139 planning for retiring bishops. Or as an alternative, Lancaster Mennonite Conference could
140 schedule a time to meet with an Everence financial advisor to assess the bishop’s financial
141 health at retirement, with .all expenses for the assessment paid for by Lancaster Mennonite
142 Conference.

143 **The bishop’s spouse and family**

144 It is often the case that the spouse of the retiring bishop has sacrificed significantly in order to
145 support her husband. It is important that the couple use the onset of retirement to have honest
146 discussions about the future of their relationship, and how they can best maximize the years of
147 health that remain. Questions such as: Does the bishop’s spouse have goals she wants to
148 achieve in these retirement years? Are there activities or plans that she has put on hold to
149 support her husband, that they now need to consider carrying out? What needs does the
150 spouse have as the retirement of her husband approaches—needs in terms of physical health,
151 emotional well-being, meaningful work and identity? The mentor bishop should not just
152 assume that these conversations will occur between husband and wife, but rather offer to
153 facilitate them and to support both retiring bishop and spouse as they discern God’s plans and
154 purposes for their lives.

155 Besides addressing the spouse’s needs at retirement, it is also critical that the couple reflect on
156 their relational identity, and on new ways to cultivate their relationship (or “we-ness”) as a
157 retired couple. Retirement represents a tremendous opportunity to nurture a stronger

158 relationship and to develop increased intimacy as they move into their senior years. A marriage
159 therapist may be an important asset for the couple at this season of their lives.

160 Finally, the couple's children and grandchildren (assuming they exist) should also be considered
161 in the retirement transition. It is possible that they have expectations of how their parents'
162 retirement might affect them—perhaps with greater expectations of time together, etc. A
163 conversation with extended family is also an important consideration for the retiring bishop.

164 **The district**

165 Just as the bishop needs to address his retirement in a systematic and healthy way, so the local
166 district needs to be proactive in developing steps to recognize the contributions of the bishop
167 while also thinking about its future after the current bishop's retirement. The value of the
168 relationship between the bishop and the pastors and members of the district should not be
169 underestimated, and through the bishop transition should be acknowledged as important. At
170 the same time, pastors and members who engage with the new bishop sooner rather than later
171 will enable the incoming bishop to develop similar relationships and strength his own relational
172 equity in the district.

173 **Creating a District Bishop Support Team**

174 While some districts have ongoing District Bishop Support Teams in place, others do not. It is
175 recommended that if a district does not have a District Bishop Support Team, that it create one
176 to support the bishop transition process, and that such a team remain in place to support the
177 new bishop as well. This team should be composed of members of the various district
178 congregations and be in conversation with the mentor bishop (or team) who is overseeing the
179 current bishop's retirement (or he may be on the support team as well). In addition, they
180 should receive some training from the Chair of the LMC Credentialing Commission as to their
181 prescribed role if they are to be effective. The District Bishop Support Team should focus on the
182 following initiatives.

183 **Helping the district to let go.** It will be useful for the district to have ample time to
184 adjust to the bishop's pending retirement. District congregations should be adequately
185 informed of the bishop's retirement and be provided with sufficient information to process this
186 in a healthy way. It may be important for the District Bishop Support Team to create a space for
187 district members to process any emotions—including grief--that they have about the bishop's
188 retirement, depending on the circumstances surrounding the retirement or the district's
189 relationship to the bishop. In some cases, outside resource persons may be drawn upon to
190 facilitate such a process.

191 While it is important for the district to symbolize the end of its relationship to the bishop, it is
192 also important for the bishop to find ways to symbolize his awareness that former relationships
193 and roles will be forever different. Following his retirement he will no longer relate as a bishop
194 to members of the district; that the support he provided he is no longer available to give. While
195 the recognition of separation is painful at times, it is necessary in order to develop new
196 parameters that will support the relationship of the district to its new bishop.

197 **Saying farewell to the bishop, spouse and family.** At a minimum, a service of
198 recognition should occur in the district in which the bishop and spouse are honored for their
199 years of service in the district. A gift from the district is also a thoughtful way to honor the
200 bishop and spouse.

201 **The Retirement Agreement**

202 It is important that the retiring bishop, district, and Lancaster Mennonite Conference mutually
203 understand and agree to the conditions of the bishop's retirement. As a result, a written
204 agreement will be signed by the bishop as well as representatives of the district from which he
205 is retiring and Lancaster Mennonite Conference (see Appendix B).⁹ To symbolize the
206 importance of the transition which the document reflects, it may be important to sign the
207 document within the context of a public district event (such as the celebration of the bishop's
208 tenure).

209 **Part II: The post-retirement role of bishops**

210 It is not possible to discuss a pathway for bishop retirement without also addressing the post-
211 retirement role of bishops in LMC. The former question is related to ministry—how does the
212 Bishop Board enable its members to finish well? The latter, however, lies more within the realm
213 of governance—what is the role of retired bishops and who should oversee them? This
214 document represents an opportunity for the Bishop Board and Conference Executive
215 Committee to collaborate on a joint document that represents their separate spheres of
216 decision-making but their shared oversight of LMC.

217 **Role in home congregation**

218 Many denominations require retiring credentialed leaders to leave their place of ministry as
219 they transition to retirement. This is also the official recommendation of Mennonite Church
220 USA, though Lancaster Conference has allowed some flexibility among its credentialed leaders
221 in this regard. For bishops, it is may be wise to worship outside of a congregation and district
222 where one had been bishop. Although the retiring bishop may feel that he is capable of

⁹ The Chair of the Credentialing Commission is responsible for seeing to it that this document signing occurs.

223 remaining in the congregation or district without interfering with congregational or district
224 affairs, this is inevitably a challenge.¹⁰ At the same time, the home congregation of the spouse
225 and bishop may be a place of wholeness and health in a challenging time of transition. If the
226 bishop and spouse desire to remain in their home congregation, it is important that a
227 conversation among the congregational leadership, the new bishop, as well as the retiring
228 bishop and spouse lead to a mutually agreed upon decision in writing as to where and under
229 what conditions the retiring bishop and spouse will continue to worship and serve there.

230 **Role in the district**

231 The question of where to become involved in church life following retirement is a critical
232 question for discussion with the mentor bishop. The incoming bishop likely needs space to
233 develop healthy relationships with district pastors, and to nurture their commitment to his
234 leadership. The very presence of a former bishop can mitigate the development of such
235 relational equity, and so it is expected that the retired bishop will no longer attend district
236 meetings, even if he continues to worship in a congregation in the district. Since there are
237 ethical questions that emerge by a retired credentialed leader becoming involved in his former
238 congregation or district, these questions are eliminated by a retiring bishop's commitment to
239 remain outside of his former district, and to worship in a new congregation unrelated to the
240 district. If the bishop and spouse desire to remain in their home district, it is important that a
241 conversation among the district pastors, the new bishop, as well as the retiring bishop and
242 spouse lead to a mutually agreed upon decision in writing as to where and under what
243 conditions the retiring bishop and spouse will continue to worship in the district.

244 In some cases, a retired bishop may be appointed to a congregational ministry role in his former
245 district. If this is the case, the current bishop and retired bishop need to discern whether the
246 retired bishop will attend district meetings and functions. In any case, written guidelines should
247 be developed to guide the retired bishop's interactions in his former district if he is appointed
248 to a ministry position anywhere in the district.

¹⁰While many denominations, including Mennonite Church USA, require credentialed leaders to relocate to another congregation following retirement, Lancaster Conference has made exceptions to this policy given the history of leaders emerging from and serving in local congregations and districts for much, if not all, of their lives. Requiring the bishop couple to leave their home church and district could lead to an even greater sense of dislocation than is already the case. As a result, Lancaster Mennonite Conference issued a statement in 2007 which described its historic pattern of allowing retired credentialed leaders to remain in the congregations they served. Where bishops make the choice to remain in their local congregation and/or district, this decision should be thoroughly discerned by the bishop and his spouse with a group that may include the mentor bishop or team, the incoming bishop, as well as a number of other persons. And where the discernment allows the bishop to remain in his local congregation or district, the expectation is that the guidelines of this document will be honored with a recognition that an even higher level of integrity and accountability will be required for the bishop. In such cases, an ongoing accountability team should be available. See Appendix C for a copy of the 2007 guidelines.

249 As a way of creating clarity around the retired bishop and district relationship, each retiring
250 bishop will complete a Retirement Agreement (see Appendix B) that will be kept on file with the
251 LMC Credentialing Commission.

252 **Role in the conference**

253 Many retiring bishops continue to desire meaningful engagement with the church, utilizing
254 their years of experience and leadership abilities in places outside of their former district(s).
255 The Bishop Board and/or Credentialing Commission, through conversations with the retiring
256 Bishop, should explore ways to utilize the gifts of retired bishops as interim pastors,
257 congregational consultants, etc.

258 In some cases, retired bishops have been appointed by the Credentialing Commission as
259 overseers of one congregation (typically the home congregation of a resident bishop). In such
260 instances, this bishop has the full rights and privileges of a bishop and will be considered an
261 active bishop as long as they are giving oversight to a specific congregation. Following the end
262 of this oversight, their credentials will be retired by the Credentialing Commission unless other
263 action is taken by the Commission.

264 Other retired bishops may serve staff roles in Lancaster Conference or in other related roles
265 such as the Credentialing Commission. In such cases these individuals will also be considered
266 active bishops will also have the full rights and privileges of a bishop while continuing in that
267 role. For all retired bishops who continue to have some role in LMC, it is recommended that the
268 Chair of the Credentialing Commission, the LMC Moderator, and the retired bishop to put into
269 writing an agreement regarding the retired bishop's continued ministry role in the conference.

270 **Role on Bishop Board**

271 Retired bishops are not voting members of the Bishop Board and generally will not attend
272 Bishop Board meetings unless invited by the Moderator.¹¹

273 Retired bishops who have been given oversight of a congregation or are serving as members of
274 LMC staff or as appointees to LMC committees may attend Bishop Board meetings as long as
275 they are in their current role. When that specific assignment comes to a close, they will no
276 longer attend Bishop Board meetings and the Credentialing Commission will move to retire
277 their credentials.

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¹¹ There is some disagreement among some retired and current bishops regarding this question of attendance and it needs to be resolved.

280

Conclusion

281 The purpose of this document is to prepare the way for bishop transitions, particularly the
282 retirement of the current bishop. The document has identified the Credentialing Commission,
283 the mentor bishop, and the District Bishop Support Team as important actors in giving direction
284 to the bishop's retirement process. It may be that additional steps or initiatives will be
285 identified by others that can be added in the future.

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Appendix A

Bishop Retirement Questionnaire

Once a bishop commits to a retirement date, he will be assigned a mentor (a retired bishop) who will be responsible for walking with him as he approaches retirement and for some time thereafter. One of the first steps in the retirement process is for the retiring bishop to complete the following questionnaire (in writing) and to discuss with his mentor bishop. Using this as a guide, the bishop and mentor will develop a series of action steps and a timeline to address issues raised by the following questions.

1. As you have considered retirement, what have been the major factors that have contributed to your decision? That is, why have you decided to retire as bishop at this point in your life? How have you seen God’s direction and understood his will in this decision-making process?
2. What process to date have you followed in discerning your retirement decision? From whom have you sought counsel, and what have they shared with you? How does your spouse feel about this decision? Are there any remaining questions or concerns in your mind about your decision that should be further processed with anyone?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
3. As you consider retirement, do you have specific plans for meaningful work and purpose? That is, have you considered the nature of your “identity” once you retire as bishop? Do you expect or desire to continue your involvement in some kind of ministry role? If so, what if anything, you have considered doing?
 - a. Action steps
 - b. Timeline
 - c. Resources needed

- 322 4. How would you describe your health at this point in your life? Are there any major
323 health concerns that you or your spouse face as you enter retirement? If so, what
324 supports, if any, do you have in place to assist you with these needs?
325 a. Action steps
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327 b. Timeline
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329 c. Resources needed
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- 331 5. Do you have plans as to which congregation you will attend once you are retired? Have
332 you and your spouse discussed where you both feel most comfortable belonging?
333 a. Action steps
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335 b. Timeline
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337 c. Resources needed
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- 339 6. What would be most helpful for you in receiving support from your district? From your
340 perspective, how might the district most appropriately acknowledge your service and
341 release you? Do you anticipate any challenges on your part or on the district's in
342 disconnecting in a healthy way from one another?
343 a. Action steps
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345 b. Timeline
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347 c. Resources needed
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- 349 7. What, if any, psychological implications do you expect retirement to have upon you?
350 Have you considered the possibility of depression or other emotional responses that
351 may emerge as you enter retirement? If these presented, how would you anticipate
352 responding to them? Do you have a mental health provider that you could turn to?
353 a. Action steps
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355 b. Timeline
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357 c. Resources needed
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- 360 8. What have been your spiritual practices to date? Which of these have been most
361 meaningful, and how do you imagine your life with God being strengthened as you enter
362 retirement? Have you considered a spiritual retreat or connecting with a spiritual
363 director?
- 364 a. Action steps
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 - 366 b. Timeline
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 - 368 c. Resources needed
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- 370 9. What plans, if any, do you have for celebrating your years of ministry and God's
371 faithfulness in your life? Have you and your spouse discussed a vacation to celebrate?
372 Might you consider a party of friends and family?
- 373 a. Action steps
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 - 375 b. Timeline
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 - 377 c. Resources needed
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- 379 10. How would you describe your financial condition at this time in your life? How, if at all,
380 have you prepared financially for retirement? Would you be willing to talk with a
381 financial advisor?
- 382 a. Action steps
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 - 384 b. Timeline
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 - 386 c. Resources needed
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Appendix B

Retirement Agreement¹²

We believe that God called us together as Bishop, District and Lancaster Mennonite Conference when the _____ District installed _____ as their Bishop.

We believe that God calls to new ministries, including those in retirement, that require the dissolution of pastoral and oversight relationships. Thus, it is appropriate that the _____ District dissolve the ministerial or formal or official working relationship between itself and _____ effective _____.

We believe that it is God’s will that this district, and its new bishop, be free to move forward in Christ’s ministry, able to establish new bonds and experience new ministry and styles.

We believe the reign of God among us is diminished if the parties above were to give any time to making or listening to uncomplimentary or critical comments or comparisons of bishop leadership. Therefore, In order to honor God’s call, will and reign, we establish this Agreement to assist each other in observing the following commitments and agreements:

Prior to leaving, the retiring bishop, together with the LMC moderator, will send a letter to the district, and have it published in each congregation in the district, stating that he will be retiring and thus will no longer be the district’s bishop. The letter will request that the district not ask the retiring bishop to officiate any services or to be involved in the district in any way after the date of effective retirement without the invitation of the new bishop. Those who wish the retired bishop to be involved in funeral or other services are to make this request through the current bishop rather than to go directly to the retired bishop.

- The retiring bishop will not engage in counseling or direct support of any of the pastors in the district from which he is retiring unless he does so at the invitation and consent of the new bishop and is given a regular report from the retired bishop of his relationship with that pastor. Pastors in the district are asked not to seek counsel from the retired bishop without informing the current bishop of their doing so.
- The retiring bishop will never initiate involvement in the affairs and business of any congregation in his former district unless invited to do so by the current bishop, and

¹² Any amendments to this document need to be done so only with the awareness and authorization of the Moderator and the Chair of the Credentialing Commission. This document is expected to applied in the cases of bishop resignation as well as retirement.

419 such involvement will be guided by a written agreement formulated by the current
 420 bishop.

- 421 • The retired bishop will not engage in negative or critical conversation about his former
 422 district, its pastors and congregations, or the current bishop.
- 423 • The district and congregation agree that during the final month of the bishop’s ministry
 424 that LMC and the respective district pastors will carry as much of the administrative
 425 responsibility as possible to enable the bishop to prepare for leaving.
- 426 • The bishop agrees that by the retirement date above, all funds, keys, papers and
 427 documents that may be considered the property of the district, and all other property
 428 belonging to the district will be transferred to the proper officers or staff.¹³

429 _____

430 Retiring bishop

Conference moderator

431

432 _____

433 New/current bishop

District pastor

434

435 _____

Date

437

438

¹³ To date there is no LMC policy that prescribes how a bishop is to distribute his papers and records following retirement. There is substantial variation as to how bishops currently do so.

439

Appendix C

440

Guidelines for when the former pastor remains in the congregation

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If a former pastor continues in the same congregation he/she should be in dialog with the conference overseer, conference minister and the current pastor. The former pastor should exercise great sensitivity to the current pastor. The continual reappearance of a former pastor at crisis points or life transition points interferes with the normal development of the relationships between the current pastor and members.

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For clear lines of accountability and ethical responsibility of former pastors, the following guidelines are given:

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- Pastoral care and crisis ministry is now the responsibility of the current pastor. Former pastors should not continue pastoral visits or respond in crisis ministry situations in place of the current pastor.

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- Former pastors will decline invitations to perform baptisms, weddings and funerals and will defer these requests to the current pastor. The best pastoral care given by a former pastor is to attend the event rather than exercise public leadership.

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- Former pastors should not accept any position in the congregation that by virtue of office puts them on the church council or the pastoral leadership group. Other assignments may be considered if approved by the pastor and congregational leadership persons.

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- Former pastors should develop and maintain an open relationship with the current pastor. Do not rely on assumptions.

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- Recognize and respect the fact that as former pastors you continue to have significant power. The issue is how that power is used or abused. Former pastors must never allow themselves to become the rallying point for discontent

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- If the former pastor is not comfortable with new directions and efforts that may well come with a pastoral change, resist the temptation to protect or rescue a program or an idea. In such a case it is better to move on and entrust the congregation to God's grace.

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- An accountability group of overseer, elders and current pastor will be formed to answer any questions former pastors may have about their role and to discuss any perceived inappropriate behavior in this regard. It is the responsibility of the overseer to see that this group is in place. (see *The Mennonite Polity for Ministerial Leadership*, page 118, #8)

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Adapted from A Polity for Ministerial Leadership, (Faith and Life Press, 1996, pages 118 and 119 and "Is Retiring From the Pastorate Within One's Own Congregation An Option?" by Earnest D. Martin, Leadership Commission of Ohio Mennonite Conference, March 1992.

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Appendix D

**Transfer of Responsibility
Retirement Policies**

- 1. Retirement** For reason of age, illness, or possible declining efficiency, persons who are ordained should retire or be retired from active responsibility in their offices.

- 2. Definition** Retirement is the easing or eventual full relief from the ordinary responsibility of an ordained person.

Retirement is not intended to change the status of ordination, nor to close opportunities for a continuing ministry suitable to their abilities. Conference and congregations should utilize in some form of Christian service the gifts, experience and God-given talents of faithful ordained workers who have reached the age of retirement.

- 3. Age**
 - at 65 years** Should begin to make arrangements for assistance and transfer of responsibility using the regular channels and methods currently used in choosing bishops, ministers, and deacons.

 - at 70 years** Should retire from official responsibility and turn responsibility over to a successor, unless conference, supervising bishop, or congregation ask them to continue in these responsibilities for a stated length of time.

Approved by Board of Bishops; January 15, 1981

October 1995
rev. August 2010

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Appendix E

Bishop Retirement Checklist

- _____ Bishop announce retirement in writing to the Chair of the Credentialing Commission at least eighteen months in advance of retirement.
- _____ Chair of Credentialing Commission schedules pre-retirement meeting with retiring bishop and spouse
- _____ Chair of Credentialing Commission updates Credentialing Commission regarding the bishop’s retirement
- _____ Credentialing Commission assigns a mentor bishop
- _____ Mentor bishop schedules meeting with retiring bishop and spouse to discuss shared expectations and timeline for meeting and completing the retirement process as described in the Bishop Retirement Guidelines
- _____ Bishop and spouse complete Bishop Retirement Questionnaire
- _____ Mentor bishop schedules meeting to discuss Bishop Retirement Questionnaire and to develop a plan for addressing any needs that emerged in its completion and follow-up discussion including the following possibilities:
 - _____ Locate a spiritual director
 - _____ Schedule a physical
 - _____ Schedule initial LAP counseling session at Philhaven
 - _____ Schedule meeting with Everence advisor
- _____ Chair of Credentialing Commission oversee (along with mentor bishop) the creation of a District Bishop Support Team. Relevant responsibilities include:
 - _____ Provide training to the District Bishop Support Team
 - _____ Plan district farewell for retiring bishop and spouse
- _____ Chair of Credentialing Commission oversee the signing of the Retirement Agreement and see to it that this agreement is honored through the retirement process.