

Moving Toward Retirement

Guidelines for Ministers of Word and Service on the Roster of the Indiana-Kentucky Synod, ELCA

“Ministers of Word and Service may retire upon attainment of age 60, or after 30 years on a roster of this church or one of its predecessor bodies, and continue to be listed on the roster of Ministers of Word and Service of this church, upon endorsement by the synodical bishop, by action of the Synod Council in the synod in which the minister of Word and Service is listed on the roster. (Bylaw 7.41.04. Constitutions, Bylaws, and Continuing Resolutions of the Evangelical Lutheran Church in America).

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From a constitutional and procedural perspective, retirement itself and remaining on the roster of the ELCA as a retired Minister of Word and Service are two different, albeit related, things.

When you retire, you will need to notify Portico by submitting some forms, one of which is to be signed by the bishop of the synod of which you are a rostered member. These forms will change your status with Portico (and, of course, the related benefits) to “retired.” **This form and process, however, is not the same as and is distinct from what is described in the bylaw quoted above.** In other words, this retirement with Portico does not automatically keep you on the roster of Ministers of Word and Service of the ELCA.

In order to continue to be listed on the rostered of Ministers of Word and Service of the ELCA and the Indiana-Kentucky Synod (or any other synod), and to engage the attendant rights and responsibilities of that status, you will need to request retired status from the Synod Council of the Indiana-Kentucky Synod. In order to make this request:

1. Review the document included with this memo, “Retirement: Policies, Procedures, and Guidelines”
2. Notify the bishop of your desire to retire and invite conversation about that decision.
3. Write a letter (email will suffice) addressed to the bishop and the Synod Council. Include in that communication:
 - a. The request that you be granted retirement status and remain on the roster of Ministers of Word and Service of the ELCA;
 - b. The date upon which you plan to retire;
 - c. When and how you plan to inform (or have informed) the community or congregation you currently serve;
 - d. Your post-retirement plans, such as where you plan to live, congregational membership, openness to various forms of ministry, etc.
 - i. Congregational membership plans are particularly important, as policies for remaining on the roster as a retired rostered leader require membership in an ELCA congregation. It is also important to address the policy’s concern that a retired rostered leader “should not remain a member of the congregation served at the time of retirement.”
 - e. If applicable, request transfer of rostering to the synod where you now live or will soon live, if not the Indiana-Kentucky Synod.
4. Provide opportunity for the bishop and staff to provide pastoral care for the community or congregation from which you are retiring.

As stipulated by constitution and bylaws, the bishop will then make a determination that the Minister of Word and Service is eligible and then recommend to the Synod Council whether such status be granted. You will receive notification of the Synod Council’s decision soon after the meeting at which your request is considered. The bishop’s office will also notify the ELCA churchwide organization of change in your roster status, e.g. from “under call” to “retired.”

D. Retirement

7.71.04. Retirement. Ministers of Word and Service may retire upon attainment of age 60, or after 30 years on a roster of this church or one of its predecessor bodies, and continue to be listed on the roster of Ministers of Word and Service of this church, upon endorsement by the synodical bishop, by action of the Synod Council in the synod in which the minister of Word and Service is listed on the roster.

- a. The policies and procedures for granting retired status on the roster of Ministers of Word and Service shall be developed by the appropriate churchwide unit, reviewed by the Conference of Bishops, and adopted by the Church Council.
- b. If a minister of Word and Service who has been granted retired status resides at too great a distance from any congregation of this church to be able to sustain an active relationship with that congregation, or if there are no ELCA congregations in the vicinity, other than a congregation previously served, the bishop of the synod in which the minister of Word and Service is listed on the roster may grant permission for the minister of Word and Service to hold membership in a congregation of a church body with which a relationship of full communion has been declared and established by the Evangelical Lutheran Church in America.

7.72. Each person on the roster of Ministers of Word and Service of this church shall be related to that synod:

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- h. on whose roster the minister of Word and Service, if granted retired status, was listed when last called, or the synod of current address, upon application by the minister of Word and Service for transfer and the mutual agreement of the synodical bishops involved after consultation with and approval by the secretary of this church.**

1. Policy and procedures related to retired status

- a. A minister of Word and Service who has attained the age of 60 or who has been on the roster of this church or one of its predecessor bodies for 30 or more years may be granted retired status by this church. Retired status is an ecclesial determination which may be granted by the Synod Council upon endorsement by the synod bishop in keeping with their constitutional authority. Such determinations are independent of the denial or granting of benefits under any health or retirement plan in which the minister of Word and Service may be a member.
- b. A minister of Word and Service who seeks retired roster status shall make a written request to the synod bishop no later than 45 days following the termination of the most recent call or of on-leave-from-call or disability status.
- c. The synod bishop shall determine whether the minister of Word and Service is eligible for retired status and whether, in the bishop's sole discretion, to recommend to the Synod Council that such roster status be granted. If the synod bishop does not endorse the request, the bishop shall report the decision to the Synod Council, in executive session if deemed necessary. If the synod bishop does endorse the request, the Synod Council shall determine, in its discretion, whether to grant retired status.
- d. A minister of Word and Service who has been granted retired status shall retain that roster status until (1) the minister is no longer on the roster of Ministers of Word and Service, (2) the minister accepts a call, or (3) the Synod Council revokes retired status upon recommendation of the synod bishop. Such revocation of a minister's retired status may occur only upon a two-thirds vote of the Synod Council, present and voting at a legally called and conducted meeting.
- e. The Synod Council shall engage in a regular, periodic examination of all ministers of Word and Service on the retired roster such that each and every retired minister's status is reviewed at least once during a three-year cycle.

2. Guidelines for retired ministers of Word and Service

a. Roster of Ministers of Word and Service

A retired minister is on the roster of the synod in which last under call or in which the minister resides. The retired minister remains accountable to the synod bishop where rostered, and the minister should regularly report to the synod bishop on any activities as a minister of Word and Service.

Unless bylaw 7.71.04.b. applies, a retired minister must be a member of an ELCA congregation in order to remain on the roster of Ministers of Word and Service and remains subject to the standards for ministers of Word and Service of this church.

b. Congregational membership

A retired deacon should not remain a member of the congregation served at the time of retirement. This provides an opportunity for the retired deacon to enter fully into the life of a different congregation with clarity about the deacon's retired role.

c. Compensation

Retirement benefits provided through Portico Benefit Services, combined with Social Security benefits, are intended to provide adequate compensation to ministers in retirement. Neither retired deacons nor their spouses are entitled to any compensation from any congregation or ministry previously served solely by reason of being retired or having previously served in that congregation or ministry.

d. Consultation with synod bishop

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

e. Transfer from one synod to another

The transfer of the roster status of a rostered minister who is retired may be authorized upon mutual agreement of the synod bishops involved after consultation with and approval by the secretary of this church.