

Moving Toward Retirement
Guidelines for Ministers of Word and Sacrament on the Roster
of the Indiana-Kentucky Synod, ELCA
December 2017

“Ministers of Word and Sacrament may retire upon attainment of age 60, or after 30 years on the roster of Ministers Word and Sacrament of this church or one of its predecessor bodies, and continue to be listed on the roster of Ministers of Word and Sacrament of this church, upon endorsement by the synodical bishop, by action of a Synod Council in the synod in which the ordained minister is listed on the roster . . . (bylaw 7.41.07. in the 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 Sacrament 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 ordained ministers of the ELCA.

In order to continue to be listed on the roster of Ministers of Word and Sacrament 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 "Retirement" excerpt from the ELCA Roster Manual included with this memo.
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 Sacrament 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.”
4. Provide opportunity for the bishop and staff to provide pastoral care for the community or congregation from which you are retiring. This begins with scheduling a transition visit of the bishop with the congregation council for as soon as possible after the retirement is made public.

As stipulated by constitution and bylaws, the bishop will then make a determination that the Minister of Word and Sacrament 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 ELCA churchwide offices of change in your roster status, e.g. from “under call” to “retired.”

D. Retirement: Policies, Procedures, and Guidelines for Ministers of Word and Sacrament

7.41.07. Retirement. Ministers of Word and Sacrament may retire upon attainment of age 60, or after 30 years on the roster of Ministers of Word and Sacrament of this church or one of its predecessor bodies, and continue to be listed on the roster of Ministers of Word and Sacrament 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 Sacrament is listed on the roster.

- a. The policies and procedures for granting retired status on the roster of Ministers of Word and Sacrament 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 Sacrament 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 Sacrament is listed on the roster may grant permission for the minister of Word and Sacrament 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.

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

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- i. **on whose roster the minister of Word and Sacrament, if granted retired status, was listed when last called or the synod of current address, upon application by the minister of Word and Sacrament 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 Sacrament 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 Sacrament may be a member.
- b. A minister of Word and Sacrament 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 Sacrament 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. The synod bishop shall act to provide for appropriate pastoral care of the congregation or for those previously served by the retiring minister.
- e. A minister of Word and Sacrament 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 Sacrament, (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.
- f. The Synod Council shall engage in a regular, periodic examination of all ministers of Word and Sacrament 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 Sacrament

a. Roster of ministers of Word and Sacrament

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 Sacrament.

Unless bylaw 7.41.07.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 Sacrament and remains subject to the standards for ministers of Word and Sacrament of this church.

b. Congregational membership

A retired pastor should not remain a member of the congregation served at the time of retirement. Transferring one's membership to another congregation allows the successor pastor to assume pastoral leadership more readily. It also provides an opportunity for the retired pastor to enter fully into the life of a different congregation with clarity about the pastor's retired role.

c. Pastoral service

At the time of retirement, a minister of Word and Sacrament is no longer pastor of a congregation and therefore must discontinue the functions of the pastoral office in any congregation previously served unless specifically authorized to do so. Ministers of Word and Sacrament must respect the integrity of the ministry of congregations which they do not serve as well as the authority of the current pastors of such congregations.

The service of retired pastors is governed by the *Constitution for Synods* [†S14.19.], which describes the role of pastors in congregations in which they do not serve: "Ministers of Word and Sacrament shall respect the integrity of the ministry of congregations which they do not serve and shall not exercise ministerial functions therein unless invited to do so by the pastor, or if there is no duly called pastor, then by the interim pastor in consultation with the Congregation Council" (†S14.19. in the *Constitution for Synods*).

The title of Pastor Emeritus has no official standing and carries with it no compensation or authorization for service or for other responsibilities.

d. Interim ministry

One area of potential service for the retired minister is interim ministry. Many retired pastors provide valuable and needed ministry to congregations in time of transition following the resignation of a pastor. The ELCA invites retired pastors to consider this important arena of ministry.

A retired pastor may serve under contract as an interim pastor during a time of pastoral vacancy only upon appointment by and authorization of the synod bishop. Retired pastors who serve under call in an interim ministry return to the active roster of Ministers of Word and Sacrament.

e. 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 pastors 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.

f. Consultation with synod bishop

As part of the bishop's pastoral care of retired ministers of Word and Sacrament, 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.

g. 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.