

The Episcopal Diocese of Ohio

Leaving Well: Clergy Leave-Taking Checklist

A pastoral word as you prepare to depart

Concluding a ministry is holy and weighty work. Whether the path ahead is retirement, a new call, or a season of rest, the decision to leave a faith community you've loved and served is never simple. You have walked with people through life's most sacred moments. You've shared meals, burdens, joys, and long meetings. You have been a visible sign of Christ's presence in this place.

And now you are preparing to say goodbye.

Leaving well is not just administrative or logistical — it is pastoral. It's about creating space for what's next, for you and for the faith community. It's about tending to relationships and helping the community shift toward its future. It's also about caring for your own well-being and honoring the boundaries that allow your future ministry to take shape.

Please know: you don't do this alone. The Bishop and her staff are here to support you — to walk with you through the details, to be a sounding board when needed, and to help make this a healthy transition for you and the parish.

The following list seeks to offer clarity and structure for the holy work ahead.

1. Initial Notifications

- Inform the Bishop of your intention to leave. Please give as much advance notice as possible. The Bishop and Canon to the Ordinary will work with you to plan next steps.
- After conversation with the Bishop's office, notify the wardens and connect them with the Canon to the Ordinary.
- Ensure the wardens notify the Bishop in writing that the parish will be without a priest (Title III. Canon 9, Section 15).
- Notify the Church Pension Fund and complete the new assignment form. Be sure to use the *annual* salary figure (not prorated). If retiring, request the retirement forms; the Bishop's signature is required.

2. Pastoral and Liturgical Closure

- Schedule your final Sunday and ensure a Bishop's representative is present to lead a litany of leave-taking and read a letter from Bishop Anne.
- Schedule time for farewells with individuals and groups.
- Offer space for reconciliation where needed.
- Schedule an exit interview with the Canon to the Ordinary. You may also wish to meet with the wardens for an additional exit interview.
- Clarify any post-departure pastoral commitments (weddings, funerals, baptisms) and ensure the wardens know alternate plans are in place.

3. Communication

- 6–8 weeks before your final Sunday, send a letter to the parish announcing your departure. This should be a joint letter from you and the wardens. See [*Guidelines and Samples for Announcing Clergy Transition – Departure.docx*](#).
- Notify community partners, local clergy groups, and organizations of your departure.

4. Organizing for Your Successor

- Review with wardens and vestry their interim leadership responsibilities (property, finance, administration).
- Leave clear, confidential notes on pastoral concerns (homebound, bereaved, pending funerals) for the next clergy person.
- Provide:
 - Updated parish calendar (liturgical, administrative, pastoral events).
 - Staff lists, directories, building use agreements, vendor contacts.
 - Recent bulletins, vestry reports, registers, audits, discretionary fund records.
 - Pre-planned funeral documentation and its location.
 - Notes on unique customs, systems, or quirks (“where to find” or “how we do...”).
 - Updated job descriptions for continuing staff.

5. Administrative Wrap-Up

- Clarify remaining vacation/sabbatical, insurance, and pension details with the vestry and treasurer.
- Reconcile the discretionary fund; remove yourself as signatory. Ensure someone appropriate remains listed.
- Document any special funds (purpose, use, signatories, current commitments).
- Remove all personal belongings and label anything gifted to the parish.
- Turn in all keys, passwords, access codes, social media logins.
- Clean out or deactivate email accounts.
 - If your email was a generic church address (e.g., rector@), disconnect it from your personal inbox (as applicable).
 - If it was a personal account, discontinue using it for parish matters and do not share it with parishioners.
 - Share your updated contact information with the Bishop's office only.

6. Set Boundaries

Upon the conclusion of your pastoral relationship...

- Update your social media and LinkedIn to reflect your new status.
- Do not comment on or engage with parish-related content on social media — including posts about the parish, its leadership, or parishioners — even if your intent is supportive.
- Do not remain involved in parish life, decision-making, or pastoral care.
- Worship elsewhere.
- Do not comment publicly or privately on your successor's leadership or the life of the parish.

We are people of resurrection: while grief is always present as we leave those we love, our trust is in God's promise of redemption. Seek the help you need as you grieve this farewell, knowing that the Bishop and Bishop's staff are prepared to be a resource to you in this transition.

This checklist is a compendium of wisdom from diocesan leaders across the Episcopal Church. We are grateful for their generosity and shared insight.

As of October 2025
Episcopal Diocese of Ohio