

# **Succession Following Meritorious Ministry: Issues for Governing Boards, Successor Ministers, and Ministers Emeriti/ae**

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**This is a working draft. Suggestions for improvement should be sent to Rev. John Weston,  
Ministerial Transitions Director, at [transitions@uaa.org](mailto:transitions@uaa.org).**

## **Introduction**

Succession following a successful ministry is almost never a simple matter. Congregants may be loath to surrender to another the place occupied in their hearts and minds by the minister emeritus/a. Governing boards may be reluctant to give up continuing access to his or her judgment and wisdom. Ministers emeritae/i, comfortable in and proud of their previous role, may seek to perpetuate it. And successor ministers, seeking to accelerate their accumulation of moral authority, to soothe their feelings of insecurity in a new position, and to put their stamp on the church's ministry, may resent the congregational adherence to "the way Rev. X did it."

The continuing role, if any, of the minister emerita/us in the congregation has largely been conceptualized as an issue for and between ministers only. The Unitarian Universalist Ministers Association *Guidelines* (available at [www.uuma.org](http://www.uuma.org); see especially sections IX.C and D) charge the minister emeritus/a with encouraging congregants' recognition of his or her changed position, referring requests for ministerial services to the successor, and speaking publicly of the successor only in supportive terms. They encourage the successor to welcome the emerita/us into the life of the congregation. If problems arise, the ministers are referred to the UUMA Chapter's Good Offices Person. Until recently, no mention was made of the responsibilities of the congregation or its leadership in this essentially minister-to-minister relationship.

With the advent of greater lay responsibility for the ministry of the church, however, it has become evident that there is a responsible, significant role for a congregation's lay leadership in succession after a successful ministry. Together with the outgoing and incoming ministers, the leadership can work to ensure that the award of minister emeritus/a status is not only honorific, but also affirmative of a continuing relationship of mutual affirmation and regard. Together, ministers and lay leaders can make it more likely that ministerial succession will be not merely substitutive but additive.

As in all congregational relationships, proper understanding and articulation of roles and relationships, and the recognition and maintenance of appropriate boundaries, greatly enhance the potential for success. Thus it is that in 1996 the UUMA amended the *Guidelines* to include the following section:

The lives of the congregation, the incumbent minister(s), and the minister emeritus/a may be enriched by the continuing participation of the emeritus/a in congregational life. The relationship among these parties should be discussed early in any new ministry, and a covenant should be agreed to and published. (IX.C.4)

The present brief document seeks to encourage a widespread exploration and implementation of this covenanting process in our congregations. It is the work of the "Dearly Departed Project," formed for the purpose by the UUA Board of Trustees, and consisting of Mr. Walt Courtley of the Board, Ms. Alice Spatt of the District Presidents Association, the Revs. W. Bradford Greeley

and Rudy Nemser, both newly retired ministers (and ministers emeriti), the Rev. John Nichols, UUMA Guidelines Committee Chair, and the Rev. John Weston, Ministerial Transitions Director (and former UUMA Guidelines Committee chair).

As the Dearly Departed Project sees the current situation,

- there is no general, Association-wide definition of the nature of the relationship of the minister emeritus/a with either the congregation or the successor minister
- practices vary widely, from congregation to congregation and minister to minister
- unrest and ambiguity characterize attitudes toward this issue throughout the Association, its ministry, and its member congregations, especially during the time of ministerial search
- the advice provided by the UUMA *Guidelines* is valuable but insufficient, and is sometimes dismissed

It thus believes that the development of common, explicit expectations will benefit ministers emeritae/i, successor ministers, and congregations alike.

The present document will be distributed to UUMA chapters and District Executives by the Ministerial Transitions Office, distributed to congregations' governing boards by the Ministerial Transitions Office and Ministerial Settlement Representatives, and posted on the UUA website ([www.uua.org/ministry/Transitions](http://www.uua.org/ministry/Transitions)).

## **UU Ministers Emeriti/Ae: A Brief Background Paper**

*by Charles A. Howe, August 2001*

The practice of congregations designating ministers as “emeritus” (and more recently, “emerita”) in our movement apparently began in the latter part of the nineteenth century, probably inspired by the academic model. Earlier in that century, ministers (especially Unitarian) were often regarded as having lifelong tenure. If in time they were unable to meet their responsibilities, they would continue to be recognized as the church’s senior minister, with a younger associate assuming much or all of the work. The emeritus title appears to have been used judiciously by Unitarians prior to the Unitarian-Universalist consolidation in 1961, but only rarely by Universalists. In both denominations the title was, by custom, reserved for honoring ministers retiring after long service to a single church. The 1960-1961 Directory of the newly-formed Unitarian Universalist Association reported 856 ministers in fellowship at that time, about three-fifths of them Unitarian. About 130 of all ministers were classified as retired, again about three-fifth of them Unitarian, 35 of whom were designated as emeritus. Although a few Universalist ministers are reported to have been so honored in the past, evidently none of them were still alive at the time of consolidation.(1)

Prior to consolidation the term “minister emeritus” did not appear in the bylaws of either the American Unitarian Association or the Universalist Church of America. Every retired Unitarian minister in fellowship was granted “all the rights and privileges of an accredited delegate [to meetings of the AUA] except the right to vote.” By contrast, each Universalist minister in fellowship, whether active or retired, had delegate status at meetings of the UCA, including the right to vote. The bylaws of the UUA adopted at the time of consolidation included the first reference to the category of “ministers emeritus,” specifically granting ministers emeriti delegate status with voting rights at General Assemblies. Later, requirements were added that the minister emeritus or emerita must have been so designated by congregational vote not less than six months prior to the General Assembly and have been previously settled in the society he or she was representing. This remains the only reference to ministers emeritus and emerita in our bylaws.(2)

The information in the 1999-2000 UUA Directory indicates that, overall, the title of “minister emeritus” (and, more recently, “minister emerita”) has been granted somewhat more extensively than before consolidation in the AUA and far more extensively than in the UCA. The directory reports that in 1998-99 there were 1,445 ministers in fellowship. Of these, approximately 300 were classified as retired, including some placed in that category after being inactive for many years. Of those retired, approximately three-fifths were designated either “emeritus” or “emerita,” in contrast to somewhat less than one-third designated “emeritus” at the time of consolidation.(3)

During this same period there has also been a significant departure from the traditional criteria for granting the emeritus (and the equivalent emerita) title. Practices, expectations, and motives have varied widely. For example, some ministers have been voted this status, not on retirement, but on leaving a congregation to accept another call; several have been voted emeritus by more than one congregation, still others after only a year’s ministry. At times, bestowal of the title has been accompanied by a modest salary and the responsibility of delivering occasional sermons; at times, to heal wounds brought about by an angry termination or resignation; at still other times, primarily to meet a retired minister’s wish to have delegate status at General Assemblies. One congregation is said to have given a former minister, then settled in another church, the title as a

step toward controlling his perceived meddling in its affairs by clearly defining the relationship. Certainly under our polity a congregation can vote to confer the status of emeritus/a on any minister it wishes, and the “job description,” if any, can be drawn up in any way it sees fit. If “all the rights and privileges pertaining to the office” is mentioned in the resolution conferring the title, those “rights and privileges” usually remain undefined.(4)

In the face of this wide variety in understanding and practice, the UUA Department of Ministry, in its recent “Policies and Procedures” posted on the world-wide-web, has suggested some guidelines for congregations to follow. It recommends that the minister emeritus/emera designaon be granted “to honor the long and meritorious service the minister has provided”; that the title be conferred following a vote of the whole congregation during a formal meeting of the church membership; that a ceremony be held to honor this action; that a gift be presented; that the action be publicized in the local media; and that the Department of Ministry be notified.(5)

### *References*

No references to the topic ministers emeritus/a were found in such standard historical works such as Russell Miller, *The Larger Hope* (2 vols.); Conrad Wright (ed.), *A Stream of Light*; Wright, *Congregational Polity*; or David Robinson, *The Unitarians and the Universalists*.

1. Directory, UUA, 1961-1962, pp. 127-174, 212; Manual: Merger and Alternatives, Joint Commission on Merger, September 1958, p. 33; correspondence with Conrad Wright and Alan Seaburg; phone conversation with Gordon McKeeman.

2. AUA Bylaws: Article IV, Section 3A, Yearbook, 1952, p. 17; Directory, 1960-61, p. 19. UCA Bylaws: Article IV, Section 1, UCA Charter and Bylaws, 1957. UUA Bylaws: Article V, Section 1.1, Directory, 1960-1961, p. 32; Directory, 1965, p. 74; Article IV, Section 4.8(b), Directory, 1999-2000, p. 469. (Much of the preceding information supplied by John Hurley and Marshall Hawkins, UUA Information Office.)

3. UUA Directory, 1999-2000, pp. 63, 259-395.

4. UUA Directory, 1999-2000, pp. 259-395; conversations with UUMA colleagues.

5. UUA Department of Ministry, “Minister Emeritus/Emerita Designation,” Policies and Procedures, 7/9/01, <http://www.uua.org/ministry/emeritus.html>.

*From the Department of Ministry:*

### **Minister Emeritus/Emerita Designation**

A congregation may bestow the title Minister Emeritus or Minister Emerita to honor the long and meritorious service the minister has provided. In our tradition of congregational polity, and more particularly because the service has been with that particular congregation, only that congregation can bestow this honorific. The title implies no financial relationship between the former minister and the congregation.

To confer emerita/emeritus status upon a minister, a vote of the congregation is required. Usually the process begins with a recommendation by the congregation's governing board or a group within the congregation, and the title conferred by vote of the membership during a formal congregational meeting. A formal resolution prepared for the purpose is typical; it expresses the congregation's appreciation and creates a permanent record of the decision. The congregation's by-laws should be consulted for specific requirements. No convention exists on the weight of the vote required to confer.

The ceremony to confer this tribute is usually a simple one, featuring a citation expressing the affection and admiration underlying the congregation's decision to confer the title of Minister Emeritus or Minister Emerita. Since the title is honorary, the occasion is informal by comparison with ceremonies of ordination or installation. It may be woven into the Sunday morning service, or it may be a planned Sunday afternoon gathering with a reception for the minister's family, congregation and guests. A UUA representative is sometimes invited.

A gift is traditionally given by the congregation. It may be a token of appreciation, but is frequently a rather substantial gift of funds. The minister emerita/us is often listed on church letterhead. The occasion of the award affords an opportunity for publicity in the community and throughout the denomination. A press release should be sent to the *UUWorld*.

The UUA Bylaws grant ministers emeriti/ae a vote at General Assembly:

**Minister Delegates and Religious Education Director Delegates.** Each certified member society is also entitled to be represented at each General Assembly by the ordained minister or ministers in full or associate ministerial fellowship with the Association settled in such society, and by any minister emeritus or minister emerita of such society in ministerial fellowship with the Association designated as such by a vote at a meeting of the member society not less than six months prior to the General Assembly, provided that such minister has been settled previously in such society, and by the director of religious education who is accredited by the Association and employed in such society. (Art. IV, Sec. 4.8 [b])

In order that General Assembly representation be granted and the minister emeritus/a listed as such in your entry in the UUA *Directory*, formal notice of the action, and any local press clippings, should be sent to:

Transitions Office  
Department of Ministry  
Unitarian Universalist Association  
25 Beacon Street  
Boston, MA 02108-2800

*From the Dearly Departed Project:*

## **Recommendations for Succession Planning**

At the very least, a congregation's conferral of minister emeritus/a (m.e.) status reflects its affection and esteem for the minister who is departing its ministry. The conferral may also constitute the invitation to a continuing role in the congregation, both as a member and as something inevitably other. In either event, the conferral will have lasting consequences, and creates the necessity for new and newly defined relationships among the m.e., the successor called minister, and the congregation. In view of the potential complexity of these roles and relationships and the strong feelings that may surround a ministerial departure, the congregation's lay leadership has a most important series of questions to consider.

### **Whether to confer?**

The decision to confer generally belongs to the congregation. The following information may be helpful to it.:

As of late 2001, the Department of Ministry has been advised of 239 conferrals of m.e. status upon 223 different ministers by congregations with which they had previously served. (Some 16 ministers have received the award twice.) The ministers' mean length of service with the conferring congregation was 14.9 years, and the median, 12.7 years. (Among all called ministries, by contrast, mean length of service is currently 8.7 years, and the median, 8.0.) By a margin of 89% to 11%, m.e. status was conferred at a time when the minister was about to enter retirement: only 14 ministers went on to subsequent called, full-time parish ministry, and another 13 to full-time community ministry or other work.

In the light of these practices, it would seem proper that a congregation bestow its designation on a minister whose service is especially meritorious: both long—ten years or more—and markedly effective. Outgoing ministers who request—or even demand!—the award of m.e. status are misusing both their power and the honorific nature of the award. The agitation of a clique within the congregation, too, should be resisted; the occasion of the conferral should be redolent with pride, affection, and admiration rather than resentment.

Congregations' bylaws are largely silent on the weight of the vote required to confer m.e. status. Most ministers considering the call to a permanent ministry will not accept with less than 90% of the vote of a well-attended meeting. Perhaps the congregation should require 75% of itself before it can consider itself ready to award m.e. status.

Where a minister is resigning in order to serve another congregation, thought may be given to deferring consideration of the award until the minister's retirement from full-time service.

### **When to confer?**

Among current m.e.s, the status was conferred coincident with the minister's departure in 85% of the conferrals; in 15% it was awarded in later years. This suggests that the conferral is most often a part of the good-bye process. In most situations this makes excellent sense. Deferring consideration to the interim period can pose a distraction from the developmental tasks that deserve to be addressed at that time. (For a description of these tasks see *In the Interim*, available by link from [www.uua.org/ministry/Transitions/](http://www.uua.org/ministry/Transitions/).) Deferring consideration until the arrival of the successor called minister may seriously interfere with the early bonding that must occur if the ministry is to be successful.

Of course, at some later date, long after the minister's departure, the congregation may realize that the quality of a minister's service was far greater than was recognized at the time. Nothing should prevent the congregation from conferring the designation at that time.

### **Ancillary considerations**

In order to assure clarity of roles and relationships, the decision to honor the outgoing minister with m.e. status should not be made before the governing board and the minister reach agreement on several salient issues. The agreements so reached, which may be negotiated by the governing board itself or perhaps the committee on ministry, should accompany the m.e. resolution.

- The m.e.-designate's changed relationship to the congregation
- The m.e.-designate's absence, or role if present, during the interim period
- The m.e.-designate's new "private person" status in public speech and action
- The congregation's authority to define the church's ministry

In addition, once a successor minister is called, the new relationships inherent in the award of m.e. status should be fully negotiated among the new minister, the m.e., and the congregational leadership. The governing board, the ministerial search committee, and the committee on ministry may all wish to be involved. Once these relationships have been agreed upon by all parties, they should be circulated among the entire congregation, widely discussed, and finally affirmed in a covenantal worship service. In addition to the resolution conferring m.e. status, one or two additional documents will be appropriate:

- Two covenants, mutually referring, one between the m.e. and the congregation, the other between the m.e. and the successor minister, in which the relationships and their limits are agreed upon, or
- A three-way covenant among the m.e., the congregation, and the successor minister(s)

Because the m.e. may possess inordinate power in the development of the covenants, the ministers and the lay leadership should draw on some or all of the following denominational resources in its planning in addition to this document:

- UUMA *Guidelines*
- district executive
- UUA Transitions Office
- UUMA good offices person
- members of the Dearly Departed Project
- Ministerial Settlement Representatives

The Ministerial Transitions Office will include this document in the packet it sends to governing boards when it learns of impending departures. Upon receiving resolutions awarding m.e. status and covenants, the Transitions Office will forward copies to the Dearly Departed Project and the UUMA Guidelines Committee.

*From the Dearly Departed Project:*

## **Sample Documents**

### **OUTLINE OF THREE-WAY COVENANT AMONG MINISTER EMERITUS/A, NEW CALLED MINISTER, AND CONGREGATION**

- I. Introduction
- II. Need for and purpose of three-way covenant
  - A. Statement of needs and concerns by the emeritus/a minister
  - B. Statement of needs and concerns by the settled minister
  - C. Statement of congregational needs and concerns by the chair of governing board and/or ministerial search committee and/or committee on ministry
- III. Minister emeritus/a's part:
  - A. Statement that the covenantal relation between her/himself and the congregation is ended.
  - B. Statement that a new covenantal relationship, one between her/himself and the congregation and the called minister, is now begun, with description:
    1. role in relation to the congregation
    2. reception of requests for rites of passage
    3. involvement in congregational meetings
    4. involvement with congregational committees
    5. reception of information about congregational disagreements and problems: "triangulation control"
    6. desires as to pulpit supply
    7. role in congregational visiting and counseling
    8. role in adult religious education
    9. role in church administrative structure, policy and personnel matters
    10. minister's membership status
    11. role in religious activities beyond the congregation
  - C. Commitments to the new called minister: consider such commitments as encouragement, responsiveness, noninterference, and "fellowship"
- IV. New minister's part: commitments to minister emeritus/a
  - A. Commitment to consult
  - B. Commitment to invite
- V. Congregation's part
  - A. Commitment to consult
  - B. Commitment to respect new role of emeritus/a minister
- VI. Mutual agreement by minister emeritus/a and settled minister to communicate with each other
  - A. Format of consultation
  - B. Facilitation
  - C. In the event of difference
    1. UUMA Good Offices Person
    2. District Executive
- VII. Evaluation and review
- VIII. Covenanting event