I’ve yet to meet a pastor who got up one morning and said “I’d like to specialize in closing churches.” Most of us entered pastoral ministry to accompany and equip those growing in faith. Many in my generation of clergy, those ordained in the 1970’s, grew up in churched families during the strongest era of Protestantism in the US. In spite of the divisive effects of the Viet Nam war on church life, we could not yet see the trend lines turning down so rapidly. We were educated to lead growing congregations of lifelong Christians. Born in the Boomer generation, we rode the age wave into more crowded, newer schools, expectations of rising economies and hopefulness about the power of social change. But the tipping point on church growth happened right before our eyes and most of us today have never served a church that has consistently grown in numbers of members. In fact, the whole relevance of membership has given way to the much more important question of numbers of persons in worship.

We have an ambivalent relationship to the metrics of our churches, the research data published and updated in both popular print media and web based knowledge banks. Pastors report taking comfort, at times, in the accounts of decline in numbers because it relieves their sense of personal or professional responsibility for the decreases in their congregation. On the other hand, it highlights the mismatch between their original vocational discernment and the outlook for their ministry in the future. Paul Nixon may have declared “I Refuse to Lead a Dying Church”1 but most of us will have tried and failed at church revitalization somewhere in the course of our ministry. Bill Easum frequently says that 80% of all revitalization efforts in churches fail to reach their goals.

**GOOD MORNING—YOU ARE NOW A LEGACY PASTOR**

We use the term Legacy Pastor to describe a pastoral leader of a church that has made a decision to conclude its ministry. There are several ways to become a Legacy Pastor. Many become Legacy Pastors because they are the settled pastor2 of a church that has gone through a discernment process and chosen some form of closure. Others are intentional interim ministers who guided a church through such a discernment process during a time of transition and the church has made a decision to close. And very occasionally, a pastor is called to a parish with the explicit job of leading the time of closure because the pastor has particular gifts or experience in this type of ministry. With the rise in the numbers of hospice chaplains across the country, some have transferred their experience in hospice ministry to the congregational setting to apply their learnings on facilitating palliative care in a community of faith.

Not every pastor is well suited to legacy ministry. Because a legacy congregation will encounter deep places of stress, a legacy pastor will need above average skills in leadership in times of stress, and be at a place in their lives where their own stress is well managed.

The effective Legacy pastor will have sufficient self-awareness, coaching, and/or spiritual direction so as to not misfile their underlying assessment about their own ministerial career into the process and decisions their church will undergo on the legacy journey. In fact, engaged understanding of what it means to be a pastoral leader in this generation in mainline Protestantism will help to generate the clear-headed compassion needed in this role.

Legacy pastors will benefit from experience and study of congregational assessment. Some form of congregational assessment has been used to arrive at your church’s legacy decision already, whether it is formal or informal. Here are two ways congregational assessment can help throughout the legacy process:
1. by establishing a shared data platform on which the congregation makes decisions
2. by assuring that everyone in your church’s family system has had the opportunity to participate.

Some churches will use a formal assessment process up front while they are determining their options about whether it is time to consider some form of revitalization, renewal, merging, closing etc. Other churches will arrive at a decision that their congregation is no longer sustainable, and will use an assessment process to weigh choices for the future. There are dozens of congregational assessment tools and resources available and the most effective often have a fee structure. This is a good time to work with your Conference staff to determine which assessment programs would be a good match for your church and circumstance and if the Conference or National UCC provides any cost-sharing or group rates for these methods.\(^3\)

If you are choosing a congregational assessment method at any point along the process, you might consider questions such as these to evaluate your choice of methods:

- How will this method collect the current and future demographic conditions and trends?
- How will it measure our local demographics with the wider landscape?
- How will it yield a clear, easy to understand presentation for our members and friends?
- Does it come with any assistance from our Conference staffperson or other consultant?
- Can I talk with a pastor/s who has used this in legacy settings to benefit from their learning?

A Legacy pastor will be more effective if they are skilled in pastoral caregiving. It isn’t enough to simply have a big “pastoral heart” and lots of compassion. Additional supervised experience, education and training in “crisis ministry” will be put to constant use in guiding the members and families through the grief process that is at the heart of legacy ministry. For this reason some persons refer to legacy ministry as “hospice ministry for churches.” There are several good sources of information about spiritual caregiving in the Legacy context.\(^4\)


Legacy pastors will be more valuable if they understand best practices for congregational finance and can support the development and administration of a Legacy Covenant in partnership with Lay Leaders.

Over the course of this legacy journey you will have many discussions and amass much material. You will study your own congregation and community and you will need to have reports that become the shared understanding of the church’s condition. The basic reports of congregational finance will be needed.\(^5\) At a minimum a Legacy pastor could help evaluate whether the church’s current financial reporting kept up to date with current standards of church finance reporting and help the church consult to get that expertise as needed. There are times when decisions about church closure have been deferred for so long that church leaders are less able to carry out the administrative work needed. While a pastor should not cross the line into making decisions for the congregation, there is a lot of room to assist leaders in preparation of supporting materials for discussion at meetings and for communication.

Once the report’s “facts” are clear, they will only be understood with clear communication. Communication often declines in the last chapter of a church’s life. One might think it would improve since the congregation becomes smaller and there are fewer with whom to communicate. It is a mistake, however, to assume that the church has become “a committee of the whole.” Communication under good conditions is challenging enough. Communication under stressful circumstances often degrades, so this is a time for the very clearest, accessible and transparent communication possible.

Concerning communication, the widespread use of email today in our communities is a blessing and a bane. The use of email has improved our communication by speeding it up, by helping us to communicate more often because it is less expensive than it used to be. But it has also been detrimental in church life when it is used to communicate material more complex than a short message with emoticons.
Access to denominational coaching during the Legacy period is essential, so improve and use your partnership with your Conference staff! If that is unavailable to you then reach out to the other denominational bodies mentioned in the Resource Appendix. These organizations exist to serve you as partners all along the lifecycle of your congregation.

It is important for the Legacy pastor to make the case for this denominational consultation to the congregation and its leaders. The wider church carefully manages two missions in this regard—to strengthen existing local church and to plant new ones or revitalize potential restarts, just as your congregation was planted many years ago. Because of this dual role, defensive suspicion can grow in local churches “that the only reason they want to see us is to steal our money/building.” A Legacy pastor has careful work to do with UCC advisors to build trust and respect as well as transparency. Ultimately, the UCC can be immensely helpful to a congregation in carrying out the hopeful future it feels called to accomplish with its final bequest/s.

The Massachusetts Conference of the UCC has established excellent best practices in this regard. They have identified their coaching and consulting services available to congregations who are evaluating their potential for new models or closing. Encourage your Conference Staff to consult with the Massachusetts Conference Office for more information about their Conference programs. Several Conferences are now offering the New Beginnings Assessment Service available through UCC National Ministries to congregations. Your Conference staff person or the UCC Congregational Assessment, Support and Advancement office www.ucc.org/newbeginnings can tell you how your church might take part in this process.

Of course there are dozens of skills and qualities desired for Legacy pastorates as with any ministry. This list is not exhaustive. We conclude this section with Practices that will sustain a Legacy pastor and ensure that they stay healthy throughout their term.

Excellent self-care helps keep the pastoral journey on the road and only in the appropriate “rest stops.” Every pastor has the opportunity to strive for a reasonably healthy life, physically and psychospiritually. And most pastors have gone through a period of time in their ministries when their priorities between caring for others and caring for self have gotten seriously out of balance. In that mix of realities rests the challenge of healthy pastoral work. Perhaps the best know study is The Duke Clergy Health Initiative, a $12 million, seven-year program intended to improve the health and well-being of United Methodist clergy in North Carolina.

No setting of ministry is immune from challenges in self-care, but we know that seemly intractable personal and congregational crises are not naturally restorative to the storehouse of pastoral health. Each Legacy pastor needs to build their own program of self-care that is tailored to their context, their particular personality make-up, the available resources, and overall health.

● **SENSE OF HUMOR AND OTHER SKILLS**

The most obvious skills are those of pastoral caregiving. But a couple of leadership tools are mentioned here. According to the Hartford Seminary Institute for Religion Research, ”if you ask a woman what she wants in a man, and a congregation what it wants in a pastor, and you’ll likely get the same answer: A sense of humor and an ability to laugh.”

In addition to an authentic religious life, a pastor who can adjust the rheostat of anxiety appropriate to the context is quite suited to Legacy ministry. The pastor’s ability to model buoyancy in facing large life challenges builds the capacity of a legacy congregation to weather the inevitable dustups that will come along in creating and implementing a Legacy Covenant. Whether using Biblical resources that lean on humor in problem resolution or in drawing on contemporary narratives that help us to laugh at ourselves in the right moments, humor is a gift in the toolbox of legacy ministry.
Q: Turn, Turn, Turn—how many decisions does it take to close a church?

A: At a minimum, one decision per person, often times, 3 decisions per person.

Like the “old saw” about changing light bulbs, there is more than one right answer to this teasing question. Every qualified member will have at least one decision to make when they vote yea or nay on the Legacy Covenant at the Annual Meeting. But the answer above acknowledges that congregations may revisit the fundamental questions about change vs close more than once. So a member might vote to stay open at one time and at a subsequent meeting vote to change the vote and close. So might a member vote to close, no….wait…I changed. my mind….vote to stay open….then no, I’m just not able to personally do what would be required of me to keep this church going—we were right the first time. So the answer is just not that simple.

Why do people change their minds about these decisions about their congregations? Well it is just plain hard work. Some congregations will have Antagonists and Protagonists on the proposal that will come to the floor of the meeting, whether it is worded affirmatively or negatively to stay open. If our church had a $1,000 for every time someone at an Annual Meeting said “just to be the devil’s advocate I’m taking the other side of the debate” the endowment would be much larger.

Email threads and the parking-lot meetings provide unhealthy venues for lobbying for one’s point of view. And the issues at hand can become emotionally loaded like “well I LOVE THIS CHURCH so I’m voting against closure.” Or, this church meant so much to MY family that it would be like spitting on their grave to give up.” Or, “we are being hijacked by ____________ who wants our assets….can’t you see that?” So how does the conversation sink to this level?

Just like there are antagonists and protagonists who use side conversations to campaign vigorously for their point of view, there are also Crusaders who use spiritual challenges to shame people into agreement. “Jesus never gave up, did he!” There are the Resuscitators who believe that if they can just call the right pastor next time they will restart the heart of the congregation and it’s a matter of spiritual fortitude to hang in there. There are the Mounted Police who ride in on the proverbial white horse to rescue the church from the “bad guys” who believe the church should/shouldn’t close and they mount organized campaigns to call out long inactive members to vote with them, according to the letter of the law of the Bylaws. I attended one Annual Meeting where an armed, private security guide checked everyone’s membership credentials at the door! And there are the Opportunists who have a particular favorite project to accomplish through the church’s final bequests of assets.

While the Legacy Pastor cannot mitigate these potential derailments all on her/his own, s/he can anticipate these behaviors of human nature and encourage the leadership of the church to pay careful attention to healthy process long before they call for a congregational meeting.

Ideally the congregation will make ONE well informed decision about their future based upon an inclusive, transparent process that exemplifies deeply held values of fairness and equality. Engaging all the members in a conversation about what would create a “level playing field” at the time of the vote is time well spent. See the previous chapter for one method wherein persons ‘earn’ their vote by reasonable participation in quality conversations.

The best leaders in the local church to cultivate during the legacy project are the people who are seen by the congregation as being fair and steady. Even if they have their own opinions that develop through the process of discernment, if they are seen as fair and kind, it will go a long way toward a good outcome.
● PASTORAL ETHICS IN LEGACY CONGREGATIONS
THE CODE OF ETHICS DURING A TIME OF CLOSURE

Unless a congregation is carrying a significant mortgage on their property and the sale of that property is just enough to pay off that note, chances are there will be financial assets for distribution. For some congregations, this bequest will be the largest sum of money their members have ever related to in their lives. Later on in this resource there will be suggestions about ways to approach the decision making on bequests in the Legacy Covenant to ensure that all is done ethically. But we would be remiss if we only looked at that as an ethical issue for the members.

We have come to understand that the church cannot distribute its assets to individuals but must bequeath them to appropriate non-profit corporations. But, in fact, there have been instances where some of those assets have been distributed to the current or former pastor based upon a so-called “deferred compensation” restitution or an extensive severance package.

The Ethics for Authorized Ministry in and on behalf of the United Church of Christ is contained in the Manual on Ministry. In the section below there are specific guidelines that are pertinent to these delicate situations that can arrive in legacy congregations. It reads:

THE ETHICS OF MINISTRY

- I will regard all persons with equal respect and concern and undertake to minister impartially.
- I will honor all confidences shared with me.
- I will not use my position, power, or authority to exploit any person.
- I will not use my position for personal financial gain, nor will I misuse the finances of the institution that I serve.
- I will not perform pastoral services within a parish or for a member of a parish without the consent of the pastor of that parish.
- I will deal honorably with the record of my predecessor and successor.
- I will not, upon my termination and departure from a ministry position, interfere with nor intrude upon the ministry of my successor.
- And under a further section there is one more pertinent vow:
  - I will be a responsible steward of my personal and family finances. I will honor and accept responsibility for all debts that I incur.

The potential to violate the Code of Ethics under these circumstances requires vigilance and audit. Perhaps the most frequent circumstance arises when a pastor agrees to see out the last days of the congregation in order to support their difficult and courageous decision to close. Congregations that are closing often have severe cash flow challenges. At some point the church and or the Legacy pastor may visit the question—“Rev. Jefferson, could you see your way clear to a reduction or elimination in regular salary in the last 6 months while we have the church property on the market? We don’t see any need to keep pledging when we are closing and we would be glad to say a handsome thank you to you once the building sells.” The unintended consequence of this decision is that the pastor has their hand in the Piggy Bank and has crossed the ethical boundary.

Another scenario has been to give deferred compensation to the Pastor who “stuck with them through thick and thin” and was always willing to take a salary below Conference guidelines. While we are busy paying off all our other obligations, wouldn’t it be good to give Rev. Washington a generous sum to help them out in retirement because we were lousy employers for all these years.”
A third type of situation is observed between churches and pastors that have been engaged in a delicately timed journey. The pastor won’t retire too soon leaving the church too poor to be able to pay a new pastor at modern “rates”. The church delays its closure by spending down endowment so that it doesn’t leave a pastor shy of their retirement benefits and “too old” to be able to find a new call.

Each of these types of scenarios pose a great risk of violation of the Ministerial Codes of Ethics that pastors swear to uphold at our installations, either in spirit or letter. In good conscience, pastors cannot engage in any of these sorts of arrangements.

Neither members nor the pastor have a claim on the accumulated assets of a congregation. Courts have found transfers of church assets upon closure to pastors or members of the congregation to be unlawful, resulting in legal, financial, and tax consequences for those involved in such a transfer. Those assets were given through stewardship giving to the mission and ministry of the church. This can be a painful and emotional realization. It is wise to involve the Conference in any conversations about final compensation arrangements. Having a neutral third party involved can be of great mutual benefit in helping everyone complete the terms of the ministerial call agreement fairly and not based on guilt or backroom deals. Sometimes congregations have no idea that there are other sources of subsidy for those retirees who pension income is inadequate to their need. The last position you want to wrestle with at closing are any lingering questions about ethics and finance. Be sure to use all the expertise available.

**TENDING MEMBERSHIP IN THE FUTURE**

Preserving the faith of members at a time when they are experiencing deep disappoint about the demise of the church family sometimes results in a permanent loss of faith and participation by members who give up on all churches as a result of their experience. The pastor and the church can exercise spiritual practices and ethics to ensure that their members don’t become spiritual “orphans.”

This orphan status can evolve for different reasons. Not every member is able to sustain conversation about an issue that touches and upsets them deeply. They will opt out of participating in the final chapter and disappear. It is important for the pastor to acknowledge this and help those persons to remain a part of the congregation at the margins, for surely this is still their spiritual home. These folks will require pastoral care just as those who remain in the process. Preaching about the challenge of grief and giving permission to withdraw a bit during painful times is good pastoral care. There is a consequence to this—often not being present for the legal votes, but the best outcome would be that every person who was a member of a church that closed would have joined a new faith community that welcomed them with a positive voice and not with a pall of failure. The legacy pastor can be a great ambassador with neighboring faith communities to help this goal be realized.

**MANAGING CAREER ANXIETIES**

Legacy Ministry is not for everyone any more than Hospice Ministry is a good fit for any authorized minister. If you have served as a Legacy Pastor and you feel that it has stigmatized your ministry in a negative way, it may be a sign that Legacy ministry may not be your best call this time. Pay attention to your own career anxiety and discuss it with your trusted colleagues and coaches. Beth Gaede’s book is an excellent resource for discernment on this matter. When Legacy Ministry has been a good fit, an authorized minister can look forward to the next opportunity to lead a congregation through a healthy process to a celebratory, though bittersweet, conclusion.

In addition to managing one’s own career anxiety, the Legacy Pastor has a responsibility as “head of staff” to advocate for the ethical conclusion of employment for any other church staff. This usually would include development of a rubric of separation benefits that is fair, equitable and transparent. As a part of the final Legacy Covenant, this rubric could take into account years of service, terms of call, and other shared factors.
Finally, each Legacy pastorate will be unique and will draw upon every gift and skill the minister possesses in loving God’s church and loving God’s people.

1 Paul Nixon. *I Refuse to Lead a Dying Church* Pilgrim Press, 2007
2 In the UCC a settled pastor is a duly called and installed pastor, in comparison to an interim or transition pastor who will serve for a designated term.
3 See Chapter 2 discussion of New Beginnings Assessment Service http://www.ucc.org/new-beginnings/
5 The basic reports are a Statement of Financial Activities (P&L or budget report)
   and Statement of Financial Position (Balance Sheet)
7 http://divinity.duke.edu/initiatives-centers/clergy-health-initiative
8 http://hirr.hartsem.edu/research/quick_question35.html