



North/West Lower Michigan Synod
Evangelical Lutheran Church in America
God's work. Our hands.

OFFICE OF THE BISHOP

Pastoral Expectations and Boundaries

Our church declares:

As an expression of its life in the gospel of Jesus Christ, this church embraces disciplinary processes of counseling, admonition, and correction, with the objective of forgiveness, reconciliation, and healing.

Simultaneously, out of deep concern for effective extension of the gospel, this church remains alert to the high calling of discipleship in Jesus Christ. The ordained ministers of this church, as persons charged with special responsibility for the proclamation of the Gospel, are to seek to reflect the new life in Christ, avoiding that which would make them stumbling blocks to others. To that end, this church recognizes that there is behavior that is deemed to be incompatible with ordained ministry, and that calls for disciplinary action" (ELCA Church Council, *Definitions and Guidelines for Discipline*, 1989, 1993, 2010).

As part of the process of calling its bishop, our synod asked how I would carry out the responsibility to exercise discipline over rostered leaders. I answered, in part,

[P]astoral care involves both admonition and support (law and gospel). The bishop's role includes providing good order while practicing mercy and forgiveness in consideration for the health of the whole church. ...While we must distinguish between forgiveness and the privilege of exercising leadership within the church, Ambrose, the fourth century bishop of Milan, helps us to negotiate this difficult path. Ambrose understood that, apart from God's grace, he was not worthy of the office. So, he prays, 'Grant first that I may know how to console sinners with profound sensitivity, for this is the highest virtue . . . Whenever the offense of some sinner is laid bare, let me be compassionate. Let me not rebuke him proudly but mourn and weep, so that as I shed tears over someone else I may weep for myself.'

As I have lived into Ambrose's prayer as bishop, my thinking about discipline has been clarified through conversation with others, including colleague bishops, partners in the churchwide office, our synod staff, synod response team, and synod council—since rostered leaders hold different perspectives regarding pastoral, professional, and personal relationships with those they are called to

serve. In those conversations, I have been encouraged to make my guiding principles more explicit.

“Pastoral Expectations and Boundaries,” which I developed in collaboration with colleague bishops, our synod staff, and our synod response team, aims at sharing those guiding principles more broadly. I hope it will help to clarify how rostered leaders should approach different situations and relationships by outlining pastoral expectations and boundaries. I expect that all rostered leaders will read and conform to this document. In the event of a conflict or allegation, I will utilize this document as a guideline for determining appropriate behavior.

I consider this an exposition and not a replacement of *Vision and Expectations*, the ELCA’s statement on expectations of rostered leaders. This exposition is certainly not exhaustive, or binding on me in terms of the discretion afforded synodical bishops in their responsibility to exercise discipline. I reserve the right to learn and grow, to deviate as needed to address specific situations on an individual basis considering all the circumstances, and to amend this exposition as experience and circumstances lead me to deem appropriate.

The church entrusts much of the work of interpreting *Vision and Expectations* to synodical bishops. Those who teach boundaries say the best guidance is to be in conversation with your bishop. Do not let your bishop be surprised, and it is always better for your bishop to hear from you than about you. This document makes clear that it in no way replaces those important pastoral conversations.

With my continuing prayers,

The Rev. Craig Alan Satterlee, Ph.D., Bishop
Easter Monday
6 April 2015



I Expectations

- a) **Rostered leaders will conduct their ministry in harmony with the constitutions of the congregation or calling agency, North/West Lower Michigan Synod, and ELCA, the Letter of Call, and *Vision and Expectations*.**

Rostered leaders face many different and complicated situations, often of a personal nature. In order to remain professional and appropriate, it is necessary for rostered leaders to conduct themselves in harmony with the documents that govern the rostered ministries of the church. Rostered leaders in the North West Lower Michigan Synod will:

- Provide spiritual guidance and teaching for congregants, congregational staff, and members of the community.
- Treat staff and congregants with dignity and respect.
- Uphold integrity through honest communication.
- Nurture their personal religious life through prayer, meditation, study, and the use of the means of grace.
- Maintain healthy boundaries with congregants by nurturing relationships with family and/or friends with whom they do not serve as a religious leader.
- Refrain from making sexual advances and engaging in sexual relationships with people other than one's spouse, and from sexually harassing congregants, whether or not the leader and/or congregant is married (this may include unwelcome or unsolicited sexual advances, requests for sexual favors, and other physical or verbal conduct of a sexual nature).
- Be accountable to an identified supervisor or group of peers that conducts regular performance reviews, seeking input from the members of the congregation.
- Be accountable to their synodical bishop and inform him or her of any personal situations that might impact their ministry.
- Maintain pastoral confidentiality; do not disclose private information about congregants.

- Recognize the power dynamic in their role with congregants and use that power to promote the well being of those they serve and never for personal ends.
- Limit their professional role to pastor and/or teacher to avoid dual relationships and inappropriate boundaries with congregants.
- Provide time-limited pastoral care during times of crisis and avoid entering into long-term counseling relationships with congregants.
- Provide referrals to community agencies and professionals for congregants who need mental health or social services.

b) Pastoral Care

Rostered leaders are required to provide pastoral care to the congregation to whom they are called. It is imperative that rostered leaders provide care for all congregants in a timely fashion. If a leader is unable to provide pastoral care for a congregant, that leader should ask for the assistance of another rostered leader. It is inappropriate for a rostered leader to provide pastoral care for a spouse, child or parent. The rostered leader has a responsibility to facilitate the identification of a pastor for those members of his or her family.

c) Collegiality and Synodical Involvement

As a synod, we aim to support pastors and foster professional relationships. It is therefore crucial that rostered leaders in our synod help foster and maintain the community by being involved with their conference's meetings and retreats, participating in Synod Assemblies and events, completing the annual Rostered Leader Report to the Bishop, and reaching out in collegiality to other rostered leaders in the synod and other denominations.

d) Regular Use of the Means of Grace

Rostered leaders are expected to maintain an ongoing relationship with a pastor with whom the bishop can partner in caring for and ministering to them. Rostered leaders are to ensure that their family members (spouse or partner, children, parents) have a pastor other than themselves. This is someone from whom the rostered leader and family can hear the gospel and with whom they can make regular use of the means of grace, including confessing their sins and receiving God's forgiveness. The rostered leader's pastor and family members' pastor need not be the same person.

e) Self-Care

- i) Rostered leaders are strongly encouraged to take at least the equivalent of one full day off per week and full vacation time as given.
- ii) Rostered leaders will strive to live a healthy lifestyle in terms of maintaining committed familial relationships, proper nutrition, exercise, and time for recreation.
- iii) Rostered Leaders will seek counseling and/or medical care when there is evidence of physical or mental illness, substance abuse, eating disorders, addictive behaviors, or relational problems.

(1) As defined in *Definitions and Guidelines for Discipline*, “Any addictive behavior that impairs the ability of an ordained minister to perform effectively the duties of the office or the misuse of alcohol, drugs, medications, sex, gambling, or pornography is incompatible with the office of pastoral ministry. The approach of this church to such a problem may be to insist upon effective treatment or to initiate immediate discipline. Refusal to accept treatment or failure to abide by the terms of such treatment is conduct incompatible with the character of the ministerial office” (Evangelical Lutheran Church in America, 5).

(2) Rostered leaders will inform and consult with the bishop so that the bishop can facilitate and assist in obtaining appropriate counseling and/or medical care and in ensuring the congregation being served receives continued pastoral care.

f) Continuing Education

As leaders in the church, rostered leaders are expected to continue to learn and adapt to the changing world by taking courses, and participating in study groups and other educational opportunities. The ELCA requires 50 hours of continuing education per year, and therefore rostered leaders in the North/West Lower Michigan Synod are expected to complete their required hours of continuing education each year.

g) Boundaries Training

Understanding and maintaining boundaries is an important part of working with others. It is expected that rostered leaders will participate in boundaries training every three years.

h) Anti-Racism Training

Since racism is such a prevailing influence on our church and culture, it is expected that rostered leaders will avail themselves of opportunities to participate periodically in anti-racism training.

II Boundaries

a) Relationships

i) Staff

- (1) Rostered leaders should treat their ministry partners and staff professionally and with respect, and in team ministry situations, foster team building.
- (2) In team ministry situations, rostered leaders will be mindful of the roles and responsibilities defined by the Letter of Call and other supporting documents. If boundaries are crossed, the rostered leader will seek the clarification of the job description and the resolution of any areas of difficulty.
- (3) In situations where another pastor, rostered leader, or lay leader acts in a way that undermines the rostered leader's ministry or position, the rostered leader will speak privately with the leader. If they are unable to resolve the issue, the rostered leader will seek the advice and counsel of the Bishop.

ii) Congregational Council, Executive Committee, and Congregants

- (1) "The call of a congregation, when accepted by a pastor, shall constitute a continuing mutual relationship and commitment..." (*C9.05). Rostered leaders are partners with the congregational council and its executive committee in leading the congregation, and with members of the congregation in proclaiming the gospel and participating in Christ's mission in the world. Rostered leaders should treat these ministry partners professionally and with respect, and foster team building.
- (2) When a conflict arises with the congregational council, executive committee, or a member of the congregation, rostered leaders will strive to model reconciliation and repentance following Matthew 18:15–17.
- (3) If the conflict cannot be resolved, the rostered leader will seek the guidance and assistance of the synodical bishop.

iii) Romantic Relationships

- (1) In matters of sexuality, rostered leaders should conduct themselves with honor and integrity, respecting the vows of marriage and the call of *Vision and Expectations* to be “chaste.”
- (2) Rostered leaders (whether single or divorced) will not become involved romantically with members of the congregation to which they are called and people with whom they have a pastoral or supervisory relationship.
- (3) Rostered Leaders who are single or divorced and wish to marry or enter into a publicly accountable, lifelong, monogamous, same-gender relationship, and rostered leaders who are married or in a publicly accountable, lifelong, monogamous, same-gender relationship and desire to separate or divorce, will seek the counsel and guidance of the synodical bishop and appropriately implement such guidance and counsel.
- (4) No form of sexual harassment or abuse will be tolerated.

iv) Congregations

(1) Former Congregations

- (a) Pastoral authority within the congregation or institution comes from the Letter of Call. Upon retirement or resignation from a call, the rostered leader relinquishes their authority and therefore must discontinue the functions of the pastoral office in the congregation, unless specifically authorized to do so.
- (b) If asked by a congregational leader, a member, relative of a member, or friend of a member of a former congregation or institution to perform duties of pastoral care functions, such as baptisms, weddings, funerals, hospital visits, home visits, or any other ministry recognized as “pastoral care” provided by a Minister of Word and Sacrament or a Minister of Word and Service, the former rostered minister shall respond with compassionate concern while respectfully declining the invitation.
 - (i) The former pastor or deacon may refer the inquiry to the called pastor or deacon (rostered lay minister) of the congregation or designated interim/supply pastor, serving as the primary minister of Word and Sacrament in the congregation

- (ii) In the event that there is no called pastor, deacon, or designated supply/interim pastor, the inquiry shall be referred first to the primary lay leader of the congregation (i.e. Congregation Council President) who will seek guidance from the synod bishop.
 - (iii) An exception to the above guidelines would be limited to occasions when the request originates with the currently called pastor or deacon or, in the absence of a called pastor or deacon, the synodical bishop.
- (c) In situations where the rostered leader wishes to continue a personal friendship with a member of the former congregation, the rostered leader will inform the current pastor of the relationship and be mindful of not undermining the current pastor.
- (d) **Retirement**
- (i) 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. 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 (*On Ordained Ministers: Manual of Policies for the Management of the Rosters, p.36*).
 - (ii) In cases of retirement, the rostered leader should follow the ELCA guidelines, which state, "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 to enter fully into the life of a different congregation with clarity about the pastor's retired role" (*On Ordained Ministers: Manual of Policies for the Management of the Rosters, p. 16-A*).

(e) Pastoral Ethics: Pastors and Rostered Leaders Relating to Previously Served Parishes Adopted by the Synod Council of the North/West Lower Michigan Synod September 2012.

- (i) When a pastor accepts a call to a congregation, a sacred covenant is established between that pastor and the people of God in that place. In order that the ministry might be strong and effective, it is important for that relationship to be strengthened and nurtured until God calls that pastor to another sector of ministry. When a pastor resigns or retires that covenant ends. How does a pastor relate appropriately to members of congregations where one has previously served? The following best practices give guidance to healthy faithful practices that have positive rather than negative impact with the congregation.
- (ii) When the pastor accepts another call:
 - 1. It is the responsibility of the former pastor to decline invitations to conduct pastoral acts in any former parish. It is important that the burden of such decisions does not fall back to the pastor who currently holds that call. As professional people, we commit ourselves to act responsibly in these matters. For the sake of the church and the ongoing ministry of the congregation, "Do to others as you would have them do to you." When we do that, our relating to members of previous parishes can be used by God to build up the body of Christ.
 - 2. It is the responsibility of the former pastor to be supportive of the successor, even when that is difficult to do. The responsibility for the success of the current pastor is also part of the former pastor's responsibility. If it is not possible to be supportive of that pastor's ministry, it is extremely important to cut off contact with members of that congregation, in order not to become a hindrance to its ministry.
 - 3. While the above statements are addressed to pastors, spouses of pastors must consider the same factors, and also respect the recommendations made above. Spouses share a pastoral identity and, as a result, can become hindrances as easily as a pastor can.

(iii) When the pastor retires:

1. Meet with the bishop well in advance to discuss your decision.
2. Whenever possible, plan retirement so that you will not be retiring in the parish where you have served as pastor.
3. If considering remaining in the same community, or moving to a former community, please consult with the Bishop before any firm decisions are made. A covenant will be written in conversation with the bishop, the congregation and the rostered leader.
4. Consider retirement as a "call to the ministry of the baptized." Retirement does not mean being uninvolved as an active church member; it means to be involved in ministry as we have encouraged members to be involved throughout our ministries. Belonging to the same congregation that one served as pastor may not allow the former pastor to function actively without creating problems for the congregation, which now has a covenant with a new pastor. Therefore, if there is any other ELCA congregation within commuting distance, transfer.
5. If you decide to live where you have served as a pastor, recognize that this may become the focus of difficulty in that setting. As you prepare to leave, declare the new relationship to members of the congregation. Visit in depth with the new pastor who has been called to the parish, so the pastor can be assured that your presence will not be a hindrance, and that you will do everything possible to be of support and help. Ongoing communication within the pastorate is absolutely essential. "Do to others as you would want them to do to you" is the guiding principle.
6. It is the responsibility of the former pastor to decline invitations to conduct pastoral acts in any former parish. It is important that you say "no," rather than, "I'll come if the current pastor says okay."
7. While the above statements are addressed to pastors, spouses of pastors must consider the same factors, and also respect the above recommendations. Spouses

share a pastoral identity and, as a result, can become hindrances as easily as a pastor can.

- (iv) It is the responsibility as a former pastor to be supportive of your successor, even when that is difficult to do. If it is not possible to be supportive of the pastor's ministry, it is extremely important that you remove yourself from that congregation, in order to not become a hindrance to its ministry.
- (v) This guideline on pastoral ethics is shared for the sake of the Church and the ongoing ministry of the congregation, to enable us to act wisely in difficult circumstances. It is provided to help rostered leaders and congregations understand S14.14 of the Synod Constitution: S14.14 Ordained ministers 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.

(2) Congregations where a member but not on staff

- (a) In situations where the rostered leader disagrees with the called pastor's position on an issue within the congregation, the rostered leader will speak privately to the called pastor.
- (b) If approached by members who disagree with the called pastor, the rostered leader will respectfully decline to participate in extended conversations, and will refer them to the called pastor or other appropriate person.

(3) Congregations not affiliated with the ELCA

- (a) Rostered leaders are to refrain from functioning in a pastoral role with congregations that are not in a full communion partnership with the ELCA.
 - (i) According to the bylaws of the ELCA, "ordained ministers on the roster of the Evangelical Lutheran Church in America must accept and adhere to this church's Confession of Faith, as well as abide by this church's standards and policies for ordained ministers." Among such policies is the provision that "an ordained minister [synodically authorized ministers as well] who serves a group schismatic from this church or

from a congregation thereof shall cease to be a member of this church” and will be removed from the roster.

- (b) In the event that rostered leaders are invited to provide pastoral ministry to congregations not affiliated with the ELCA, and rostered leaders are inclined to accept that invitation:
 - (i) Rostered leaders will consult with the bishop who is the chief ecumenical officer of the synod and receive the bishop’s prior written authorization. In carrying out this pastoral ministry, rostered leaders will appropriately implement the bishop’s guidance and counsel.
 - (ii) In a true emergency, when there is insufficient time to consult the bishop and receive prior written authorization, rostered leaders will report to the bishop the circumstances and the pastoral ministry provided in a timely manner (e.g., three (3) days).
 - (iii) Rostered leaders will monitor their pastoral ministry with congregations not affiliated with the ELCA so as to avoid the perception of dual rostering or engaging in schismatic behavior (e.g., no more than 5-6 times per year).
 - (iv) Rostered leaders will not deride ELCA congregations, the North/West Lower Michigan Synod or ELCA when conducting pastoral ministry in congregations not affiliated with the ELCA.
 - (v) Though they may seem pastoral and expedient, rostered leaders will not engage in preaching and/or sacramental practices inconsistent with Chapters 2 and 3 of this church’s constitution, the Lutheran Confessions, and *The Use of the Means of Grace* (e.g., consecrating the elements apart from worship or without a Christian assembly present and receiving Holy Communion; reservation of pre consecrated elements for later distribution as part of a congregation’s regular worship).

b) Social Media

- i) The extensive reach of social networks is attractive and has enticed many faith communities and spiritual leaders to establish a virtual presence as a ministerial resource. For many, the social networks and the World Wide Web are exciting new tools for ministry. While these tools offer access to fertile grounds and present exciting opportunities

for ministry, they are equally fertile grounds for ethical and boundary violations, both intentional and unintentional, by spiritual leaders and by those with whom they share the space. Like most tools, they are in and of themselves neutral and as such, have the potential for good or harm.

- ii) Rostered leaders should enter and participate in this arena having engaged in conversation—including conversation with congregational leaders—that explores critical questions of how to use social media tools wisely in ways that preserve rostered leaders' sacred trust.
 - iii) Rostered leaders are accountable for what they post and receive, whether via text, email, or social media.
 - (1) Rostered leaders understand that email, web surfing, and texting on devices or using access provided by the congregation is accessible to the congregational leaders and rostered leaders should act accordingly.
 - (2) Rostered leaders will engage social media with an attentiveness and concern for young people and children.
 - (3) Rostered leaders will act in ways that recognize that social media is neither private nor confidential.
 - iv) Rostered leaders will not use social media as their primary means of self-care, counseling, and support.
 - v) Rostered leaders should monitor the amount of time they spend on social media and designate times when they turn their devices off.
- c) **Finances**
- i) Rostered Leaders are expected to be fiscally responsible and faithful stewards of time, talents, and possessions.
 - ii) In financial matters, rostered leaders will conduct themselves with transparency and in accordance with the ELCA policies of handling of money.
 - iii) Rostered leaders will not use their office for personal financial gain.

Adapted From:

ELCA, *Vision and Expectations*.

ELCA Church Council, *Definitions and Guidelines for Discipline*, 1989, 1993, 2010).

“A Covenant of Professional Relationship for the Ordained Rosters of the Southwest California Synod.” Southwest California Synod ELCA. Print.

"Pastoral Expectations." *Pastoral Expectations*. Northwestern Ohio Synod, 6 June 2011. Web. 26 Jan. 2015.

"Sample Code of Ethics." *Baylor University // Clergy Sexual Misconduct Study //*. Baylor University, 1 May 2009. Web. 26 Jan. 2015.