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TO THE READER

Shalom, chaveirim,

In memory of Rabbi Peter Knobel, z"l, our late co-chair, we bring you our Handbook on Retiree-Successor Relations: Task Force Report. Much of Peter’s Torah is contained in the handbook.

We have learned how challenging it is for rabbis to go into retirement. For us, our rabbinate is not simply our profession; it is our life. The transition into retirement entails numerous life changes for the rabbi, the rabbi’s spouse/partner, and the community that the rabbi had served. We understand how a rabbi can feel unappreciated, undervalued, and irrelevant in retirement. There is no question that retirement presents enormous and too-often painful personal and rabbinic adjustments for some colleagues.

Yet the vast majority of rabbis navigate the course into retirement with fulfillment and excitement. They enjoy productive retirements often engaged in encore careers. They pursue projects that the crush of their active rabbinites had previously prevented them from exploring. They volunteer their expertise by serving on a CCAR committee or task force, or by writing a chapter for a book. They have the time to cultivate deep relationships with family, friends, and rabbinic colleagues. They become involved in community organizations or even found new ones. We have been impressed by the creative ways that retired colleagues have put to work the many skills honed over decades of rabbinic leadership.

Similarly, the vast majority of retired rabbis have excellent relationships with their successors. The retiree and the successor have crafted a relationship that is beneficial to both. Yet we must also acknowledge that at times the relationship becomes fraught—to the detriment of the congregation, the colleagues, and the rabbinate as a whole.

Perhaps our most important learning is this: when conflict arises between a retiree and successor, it is usually a function of the synagogue’s or organization’s system. This system includes members, lay leaders, staff, and clergy. Moreover, in clergy transitions, the entire system is challenged. In successful transitions, thoughtful planning clarifies nebulous boundaries. However, when key decisions and conversations are neglected, systemic conflict may arise. In other words, what seems to present as a matter of personality or misbehavior, is more often a systemic problem of rabbinic transition.

It is in this spirit that we offer this handbook on behalf of the CCAR: to guide retirees and successors to build their relationship with mutual k’vod harav and with an understanding of the transitional issues that lead not only to the success of their relationship but also, and equally important, the health of the congregation.

Rabbi Michelle Pearlman, co-chair
Rabbi Laura Geller, co-chair
Rabbi Alan Henkin, CCAR staff
INTRODUCTION

The CCAR Task Force on Retiree-Successor Relations is pleased to present this handbook. The CCAR created the task force to proactively address the confluence of several factors in the rabbinate and within the CCAR.

In 2013 the Board of Trustees approved a primary goal which states in part:

The CCAR leadership, staff, and structure will be accessible and responsive, recognizing that we serve a membership of diverse rabbis and diverse needs, and will foster a culture that supports meaningful relationships between the CCAR and its members as well as among our members.

In furtherance of this goal, the CCAR took several steps, including designing a Member Support Study, organizing follow-up focus groups, adding two key staff people (a Director of Rabbinic Education and Support and two part-time CCAR Special Advisors for Member Care and Wellness), and initiating special task forces (e.g., the Task Force on Women in the Rabbinate, and this Task Force).

The outcome of the Member Support Study and the follow-up focus groups affirmed, first, that CCAR member rabbis truly love being rabbis. Yet, at the same time, there was a clear prevalent feeling of professional and personal isolation and loneliness, especially at times of life and career transitions. These transitions might involve one rabbi assuming a new pulpit, as another rabbi retires—and sometimes these events were occurring simultaneously within the same congregation or organization as one rabbi retires and a new rabbi began. One particular need identified within the study was “better preretirement counseling and help preparing for that transition, and NOT just in terms of finances. Psychological adjustment to loss of status, function, and role is significant and CCAR does very little with this.” It was observed “both that older rabbis and younger rabbis would benefit from a collegial relationship.”¹ Thus the study pointed out the necessity to look more carefully at retiring rabbis and their successors.

At the same time, the Reform rabbinate was facing a wave of retirements, as the baby boomers or the Vietnam generation of rabbis reached retirement age. A review of the large HUC-JIR rabbinic classes of the 1970s and early 1980s revealed that many rabbis would be arriving at age 65 immediately and in the near future. For example, in one major metropolitan center, there were as many as five retirements in five separate congregations and another dozen occurring within smaller communities.

¹ A total of 761 rabbis responded to the survey for the Member Support Study and of those 15% self-identified as retired, similar to the overall percentage in the CCAR membership.
In 2017, during the transition from CCAR President Denise Eger to CCAR President David Stern, the Chief Executive Steven Fox brought the Task Force proposal to the Board of Trustees, explaining that, given the above factors among others, the CCAR needed to proactively address the issue of retirement and the relationships among our rabbis.

Steve Fox’s initial report to the CCAR Board of Trustees proposing the Task Force stated that its charge was to address the relationships between rabbis and their successors and to “provide best practices and models to promote healthy relationship between them.” This was further delineated as:

1. Providing resources to retiring rabbis and successors (such as rabbi emeritus/successor guidelines that incorporate best practices).
2. Creating safe places for honest and open conversation among colleagues.
3. Helping facilitate a rabbi’s transition into retirement.

In subsequent reports to the board of trustees, areas of best practices were identified as:

1. Preparing oneself and one’s congregation/organization for retirement.
2. Transferring of information and relationships.
3. Entering retirement (beyond the RPB).
4. Setting up the successor for success.
5. Navigating the successor-retiree relationship.

In January 2018, President David Stern appointed Peter Knobel, z”l, to chair the Task Force, and David asked Alan Henkin, the Placement Director Emeritus, to staff it. David then appointed twelve members who represented a cross-section of CCAR members, achieving a balance by gender, geography, successors, retirees, and congregational/organizational size. The first meeting of the full Task Force took place in February 2018.

We began an initial inquiry phase that lasted for the remainder of 2018. The Task Force created a bibliography for itself to study, and as a group, we also read and discussed the relevant sections of the Guidelines on Rabbinical-Congregational Relations (the “Gold Book”) and the CCAR Code of Ethics. We conducted numerous group interviews with such people as Rabbi Steven Fox; Helen Dennis, a widely respected gerontologist who presents frequently at the RPB seminar; Rabbi Andrea Berlin, chair of the CCAR Committee on Ethics; Rabbi Elliot Schoenberg, Vice President for Placement for the Rabbinical Assembly; Michael Gan, employment attorney who has negotiated dozens of retirement agreements; and several recent retirees and successors.

In addition, Task Force members individually interviewed a number of people: Rabbi Gary Greenebaum, a CCAR member who has made retirement preparation a specialty of his coaching practice; Hal Lewis, a professor of nonprofit leadership who recently retired as
the CEO of Spertus College in Chicago; and Nancy Schlossberg, a professor emerita of counseling psychology who has published several books on the transition to retirement.

The final piece of inquiry was to listen again to colleagues. For example, in January 2019, Peter Knobel led an engaging session with colleagues at the NAORRR Convention in San Diego, bringing back to the Task Force several insights. In April 2019, at the Cincinnati CCAR Convention, Michelle Pearlman, Peter Knobel, and Alan Henkin conducted a well-attended session at which both successors and retirees gave feedback. The Task Force intends to engage in ongoing conversations with colleagues in order to widely share this handbook.

In June 2019, CCAR President Ron Segal appointed Michelle Pearlman as co-chair along with Peter Knobel. Her appointment balanced the leadership of the Task Force between retirees and successors. In August 2019, tragedy struck with Peter Knobel’s untimely passing, which shocked the entire rabbinic community and deprived the Task Force of our leader. CCAR Chief Executive Hara Person and President Ron Segal then asked Laura Geller to succeed Peter as co-chair, and fortunately she agreed.

Members of the Task Force:

- Jeremy Barras, *Temple Beth Am, Pinecrest, FL*
- Alexis Berk, *Temple Solel, Encinitas, CA*
- Barry Block, *Congregation B’nai Israel, Little Rock, AR (Board liaison as of May 2019)*
- Darryl Crystal, *Temple B’nai Shalom, Interim, Fairfax Station, VA*
- Joshua Davidson, *Temple Emanuel, New York, NY*
- Laura Geller, co-chair, *Temple Emanuel of Beverly Hills, Emerita, Los Angeles, CA*
- Wendi Geffen, *North Shore Congregation Israel, Glencoe, IL (Board liaison January 2018–March 2019)*
- Leslie Gutterman, *Temple Bet-El, Emeritus, Providence, RI*
- Peter Knobel, co-chair, *Beth Emet, Emeritus, Evanston, IL (deceased)*
- Mara Nathan, *Temple Beth-El, San Antonio, TX*
- Michelle Pearlman, co-chair, *Beth Chaim Reform, Malvern, PA*
- Jeffrey Portman, *Agudas Achim, Emeritus, Iowa City, IA*
- Daniel Weiner, *Temple De Hirsch Sinai, Seattle, WA*
- Elaine Zecher, *Temple Israel, Boston, MA*

- **Staff:** Alan Henkin, *CCAR Placement Director Emeritus*

We are also grateful to Rabbi Rick Jacobs, Amy Asin, and Rabbi Janet Offel of the Union for Reform Judaism, who carefully reviewed this document and gave helpful feedback that shaped this final version.
PREAMBLE

A rabbinic retirement is a time of excitement, new directions, and vision for the retiree, the successor, and the congregation. It is an inevitable time of generational transitions. However, all transitions, even positive ones, can bring challenge, pain, loss, and even grief. Rabbinic transitions can be particularly difficult to navigate and fraught with emotion. This is true not only for retiree and for successor but also for congregational leaders and members. For a retiree, there is a change in role and often a shift in identity. For a successor, there is the challenge of becoming established and accepted as the rabbi in a new congregation. Congregational leaders have a stake in the successful transition of rabbinical leadership. How will a shift in authority affect the connection of members to their clergy and congregation? What changes will there be in leadership style, policies, and programs? And of course, for members, there is the personal relationship between congregant and rabbi. These difficulties are heightened as scarce resources are available to address problems as they arise.

The matters addressed by our Task Force have been prioritized based on real-life, real-time concerns. The aim is to prevent conflict and nourish relational and congregational wellness. There are many reasons why past experience necessitates wise and thoughtful protocols and practices. For example, in the past, the issues raised in retiree-successor transitions have at times been left to the rabbis to negotiate on their own. When problems arose, they were not viewed as challenges with systemic impact but rather as personality conflicts between stakeholders. Seen as personality conflicts, issues were easily dismissed only to have developed into larger misunderstandings later yielding bigger problems for clergy, leaders, members, and the congregation alike. Further complications may arise depending on the circumstances surrounding the retirement. Some retirements are voluntary, some less so.

In the rabbinic world, no colleague wants to be perceived as having difficulty with another. Conflicts may go undiscussed because colleagues are reluctant to speak ill of other rabbis. Successors who feel undermined by their retiree may feel shame because they were not able to negotiate these challenges successfully, and may be loathe to share their stories with friends and colleagues. There is a silencing on this issue that keeps real problems hidden from view. If left to fester, these problems can and do explode into the many ethics complaints that currently crowd our CCAR ethics process. Systems currently in place offer inadequate support to all involved.

Our Task Force is concerned with the well-being of our congregations. Those of us who are congregational rabbis recognize that our relationship with one another is part and parcel of a larger congregational system. The health and success of our individual rabbinates are intertwined with the health of the communities in which we serve.

In the same way that our Conference has committed itself to work to unearth the issues of systemic sexism through the work of our Task Force on the Experience of Women in the Rabbinate, a systemic approach to the issues of retiree-successor relationships as they impact rabbis and congregations and other Jewish institutions where rabbis serve is in
order. Synagogues, after all, are complex networks of many other systems, one of which is the relationship between the successor and the retired rabbi. What happens within this successor-retiree system influences other systems in the synagogue, including the overarching synagogue system.

In recognition of the complexity of these retirement issues, the leaders of the CCAR created our Task Force in January 2018 to respond to the coming wave of boomer retirements among rabbis. In our deliberations, several Jewish values guided us, especially k’vod harav, hakarat hatov, tzedek, and sh’lom bayit. We studied numerous documents on retirement in general and clergy retirement in particular. We looked at biblical and rabbinic texts related to retirement and succession. We interviewed experts on retirement and transition, as well as retired and successor colleagues who have navigated their transition with varying degrees of success. We also spoke with rabbinic leaders of our Movement and the Conservative Movement.

In our work developing documents on best practices and sample retirement contracts, we aim to provide resources and guidance that can be shared with all stakeholders. Our document on intentional conversations is designed to help lay the groundwork for healthy relationships and sacred partnerships undergirded with mutual respect and understanding. Our retiree mentoring program will provide connection and support for retiring rabbis who are navigating an important transition to a new phase of their rabbinate building upon the robust network that NAORRR has established. Our recommendation for a successor network will provide mentoring, connection, and support for successors seeking to establish themselves in their new congregational rabbinate. Our recommendation for mediation will provide support and resources for colleagues who find themselves in a conflict that otherwise might lead to an ethics complaint and violation.

In our shift from approaching retiree successor transition issues from interpersonal to systemic, we do not seek to disregard the importance of healthy relationships. Rather we understand a strong relational foundation to be critical for a healthy congregational transition. With these offerings, our CCAR Task Force on Retiree-Successor Relations begins the process of addressing the multitude of issues that face our rabbis who are working in congregational systems in transition. We may not yet be able to address all of the challenges or determine all of the answers; however, our research enables us to hear the voices of our colleagues which are often silent on these issues. We understand the blessing a successful transition can bestow on rabbis and congregations, as well as the pain and havoc a poor transition can wreak. Our task is to begin.

May God bless all the deeds of our hands.

יִבְרֶךְ אֶת כל מעשי ידינו
BEST PRACTICES

A Best Practice is one that has been shown, by experience and/or evidence, to yield a positive result for the retiree, the successor, and the institution.

For a rabbi approaching age 60 and/or working on a contract that would extend beyond your 60th birthday:

1. Read this Task Force’s document, “Intentional Conversations toward a Healthy Congregational Transition,” and keep it as a resource for the years ahead.
2. Attend the RPB’s Retirement Planning Seminar.
3. Consult sample retirement contract resources provided by this Task Force.
4. Speak with your family—above all, spouse/partner, if applicable—about your retirement plans. Take their input to heart, while sharing your own thoughts and dreams.
5. Dream about your retirement: What would you like to do in retirement that you cannot do while working full-time in your rabbinic position?
6. Speak with congregational leadership confidentially regarding your thoughts about when you may like to retire.
7. If you have a good relationship with colleagues working at your institution, let them know your thoughts about retirement after you have spoken with family and congregational leadership.
8. With your spouse/partner, if applicable, and if you do not plan to move away immediately after retirement, strongly consider taking a year or two away from your community immediately after retirement, and begin planning for it.
9. Be aware that grief and feelings of loss often accompany rabbinic retirement. Seek ways to explore those feelings, including through CCAR and/or NAORRR resources, private counseling, or retirement coaching.
10. Join NAORRR at age 60 and consider attending a NAORRR Convention.
11. Consider taking the CCAR’s interim training, whether or not you are interested in becoming an interim rabbi, or another transition management program, because you will be a key actor in the synagogue’s transition.

For a rabbi announcing retirement:

1. Announce your retirement publicly approximately 18 to 21 months in advance.
2. Coordinate your retirement announcement with key congregational leaders. The announcement should come in two letters, one from you and one from the president.
3. Complete all negotiations of retirement contract, if applicable, prior to any announcement of the date of retirement.
4. Consider who needs to know before receiving the public announcement. In addition to family, these people should start with the president. Once the president is informed, strategize with the president to create a list of whom to inform and in
what order. This list should be developed with the president and would typically include the board and clergy colleagues within the institution, past presidents, and then the congregation before the wider public. Other than family and the president, inform these people only very shortly before the public announcement so that word does not get out before the official announcement.

**For congregational leadership whose rabbi is approaching age 60, or who are working on a contract that would extend beyond the rabbi’s 60th birthday:**

1. Refer to this Task Force’s document, “Intentional Conversations toward a Healthy Congregational Transition,” and refer to it as a resource for the years ahead.
2. Open a confidential conversation with your rabbi about the rabbi’s plans for retirement. You may reduce anxiety by mentioning that the CCAR Task Force on Retiree-Successor Relations has suggested such an early conversation.
3. Be open with your rabbi about your own views on the right time for the rabbi to retire.
4. Consider sample contract resources provided by this Task Force.
5. Consult URJ transition resources, including the URJ’s Rabbinic Transition Roadmap. You may request the Roadmap here: https://urj.tfaforms.net/f/rabbinic-transition-roadmap.
6. Contact the Director of the CCAR’s Rabbinic Search Services to learn about the advantages of considering an interim rabbi when the time for transition comes.
7. If you may anticipate an internal candidate for the successor position, contact the Director of Rabbinic Career Services and URJ transition specialists to learn about best practices for this situation before opening any conversation with any potential internal candidate.

**For congregational leaders whose rabbi has announced retirement:**

1. Determine whether the retiree should be named rabbi emeritus/emerita. Inform yourself of what that entails, in conversation with the retiring rabbi, URJ transition staff, and the CCAR Director of Rabbinic Career Service. Typically, a rabbi who retires under honorable circumstances, and has served the congregation for a substantial period, is named rabbi emeritus/emerita.

2. If the rabbi is to become rabbi emeritus/emerita, be as specific as you can in communication with the congregation about the rabbi’s post-retirement relationship with the congregation without promising that the rabbi will continue to provide rabbinic services.

3. Engaging an interim rabbi is recommended in virtually all circumstances after a rabbi’s retirement, before a settled successor is engaged. When a rabbi’s retirement
is experienced as a loss to the congregation and/or many of its members, or when the rabbi’s retirement is involuntary and even minimally traumatic, the service of an interim rabbi is essential for a healthy transition to new rabbinic leadership. Contact the Director of Rabbinic Career Services.

4. Plan to celebrate and honor the retiring rabbi’s years of service. Seek out appropriate ways to honor the rabbi emeritus/emerita. Perhaps a fund is set up to honor the rabbi emeritus/emerita with a scholar-in-residence, a camp scholarship, or service in whatever area was particularly important to the emeritus/emerita. For additional information on saying goodbye, see volume 3 of the URJ’s Rabbinic Transition Roadmap, “Saying Goodbye.”

5. Appoint a transition committee. Understand that transition continues well beyond the date that the settled successor rabbi takes the reins; for at least 18 months beyond that date and, in most cases, until the second contract is signed. Consult the CCAR’s Director of Rabbinic Career Services and see the URJ’s Rabbinic Transition Roadmap for information on transition committees.

For all rabbis, immediately after retirement:

1. Step back from the congregation for a period of time. A practice that has shown to be successful—if affordable, not precluded by health, and not disruptive to the life of a spouse or partner—is to spend a year or two away from the community altogether, i.e., through the settled successor’s first year.

2. A best practice is to absent one’s self from High Holy Day services at least through the settled successors’ first year.

3. If moving away is not practical, plan to stay away from the institution for that first year or two. This best practice does not mean that the retired rabbi and/or spouse/partner must stay away from a dear friend and long-time congregant socially or from their life cycle event, as an attendee. The Task Force recognizes that staying away from the congregation may not be possible in communities with extremely limited synagogue options. However, the principle remains: the newly retired rabbi should not be a constant presence in the life of the congregation.

4. Do not insert yourself in the placement process, either for an interim or a settled successor. If a candidate reaches out to you, be welcoming and provide honest information, and keep those conversations entirely confidential.

5. Get to know your successor—and, where relevant, the interim rabbi, as colleagues—and hopefully, as friends.
6. While maintaining social relationships with former congregants, never engage in conversations about your successor, synagogue governance, policies, or ritual practices.

7. The retiree’s spouse/partner, if any, should withdraw from leadership roles and refrain from discussion of the successor or congregational governance. Be mindful that the retired rabbi’s spouse/partner is likely to be viewed as reflecting the position of the retired rabbi.

8. See also the list below, “For all retired rabbis.”

For interim rabbis and successors, whether the retiree is named emeritus/emerita or not:

1. Read this Task Force’s document, “Intentional Conversations toward a Healthy Congregational Transition,” and keep it as a resource for the years ahead.

2. As soon as you have been selected, contact the retiring rabbi to establish or renew a relationship. Get to know your predecessor as a colleague—and hopefully, as a friend. Where applicable, include your spouse/partner and the retiree’s.

3. Beginning as part of due diligence in the placement process, learn from lay leadership what has been promised to the retiring rabbi in terms of involvement in the congregation. While the interim and successor ought to not be privy to financial arrangements with the retiree, the interim and successor do need to know what the retiree has been promised with respect to continued service to the institution and its members, office in the building, discretionary fund, and other areas that will be the interim’s and successor’s role to facilitate and navigate. Though it may be difficult, we encourage the interim and successor to speak frankly with congregational leadership—and, if possible, with the retiree, about areas of concern. The CCAR and the URJ are available to facilitate communications.

4. It is important to practice kavod harav in relating to the retiring or retired rabbi. Extending kavod harav will look different in various situations and congregational cultures, but it always includes speaking kindly to the retiree (and the retiree’s spouse/partner, if applicable), being concerned about their health and well-being, and noting the retiree’s presence publicly.

5. If discomfort or a problem arises, work to de-escalate it while also protecting the congregation’s and your own well-being. Consult CCAR leadership staff. If you fear that the retiree is violating the ethics code, speak privately with the chair of the ethics committee and/or the chief executive of the CCAR before taking any other steps. They may suggest alternative resolutions.
For all retired rabbis:

1. Do not officiate at life cycle events for your former congregants, with the rarest exceptions. For the purpose of this best practice, life cycle events for your former congregants include weddings of young adults who grew up in the community and whose parents are still members, whether the young adults are members or not.

Exceptions to the best practice of not officiating may include:

A. Covering for the interim rabbi or successor in their absence or when they’re overwhelmed, at their request.
B. Co-officiating with the interim rabbi or successor at their invitation.
C. Life cycle events for your own immediate family.

2. Clearly articulate your desires about future participation in the life of the community to the interim and the successor rabbis and listen to the desires of the congregation.

3. A best practice is not to maintain an office at the institution. The principle is not to be a constant presence in the building. In many places, space may be an issue. (You may, however, if negotiated with temple leaders, retain clerical support and place for your rabbinic library in the congregation. Modern technology permits that to be done at a distance.)

4. Follow all congregational policies with respect to life cycle officiation, congregational worship, discretionary funds, and the like. Note that these policies may change after your retirement. The retiree must observe all changes and may not voice any disagreement with them except privately to the current rabbi and/or president.

For an interim or successor rabbi with a rabbi emeritus/emerita:

1. Keep the rabbi emeritus/emerita informed of all life cycle and pastoral events in the community, unless the emeritus/emerita prefers not to be informed.

2. Meet regularly, i.e., at least quarterly, with the emeritus/emerita to keep them abreast of life in the community and to deepen your personal relationship. Invite input from the retiree, and respond non-anxiously to privately-expressed criticism or when you disagree, remembering that input is only input and entails no obligation to heed.

3. Always respond to communication from the emeritus/emerita promptly and cordially.
4. Consider ways to strengthen a personal relationship with the emeritus/emerita—including, where applicable, spouses/partners of emeritus/emerita and successor.

5. Assure that the institution is according appropriate kavod to the emeritus/emerita, e.g., listing the emeritus’s/emerita’s name and title where appropriate, publicly noting the emeritus’s/emerita’s presence, providing no-cost admission to significant temple events, providing an honored role for the emeritus/emerita at milestone institutional events, honoring milestone anniversaries of the retired rabbi’s ordination and service to the institution, and the like.
INTENTIONAL CONVERSATIONS TOWARD A HEALTHY CONGREGATIONAL TRANSITION

Reflection Topics for Retiring Rabbi to Have with Others

This section is provided to encourage retiring rabbis (and their spouses/partners and families, when appropriate) to consider aspects of the next chapter of their lives. You will find questions below as conversation starters focused on different topics. When grounded in intentionality and thoughtfulness, these conversation starters create a framework for reimagining oneself or one's career in retirement. Many colleagues experience joy and growth in their post-retirement "encore careers." Proactive visioning and reimagining through consideration of both emotional and pragmatic elements help lead to clarity and the opportunity to embrace new possibilities moving forward.

For the retiring rabbi with a spouse/partner, therapist, spiritual director, or trusted friend:

- What have your thoughts been regarding your retirement? What issues in retirement concern you? What are areas of excitement? What are the things that worry you?

- What has the involvement of the rabbinic spouse been in the congregation historically? How will that shift and conversations around that shift be negotiated?

- What are the needs of the retiring rabbinic spouse/partner?

- Has anything surprised you as you are making this transition?

Life Beyond the Synagogue World:

- What will be new for you in this next chapter?

- How might travel fit into your life now?

- It has been said that in order to be retired, one should become rewired for growth and ongoing learning. How will your identity change? Where will you find support? How will you discern opportunities and new growth areas?

Toward Creating Healthy Successor Rabbi/Retired Rabbi Relationships:

- In what ways do you expect to remain active in the community? What does that mean for you in terms of how you will or will not be involved in the life of the congregation?
• What do you want your successor to know about you that may not be obvious to the new rabbi?

• What programs do you most care about in the congregation? How will you feel when congregational changes of programs that you may have initiated are made? How will you deal with those feelings?

• In her book Revitalizing Retirement, author Nancy Schlossberg identifies six ways that people’s identity may change as they retire. How do these resonate with you?

  A **continuer**: Someone who is continuing in the same arena but in a modified form?

  An **adventurer**: Someone who does something very different. For example, a newspaper reporter who becomes an artist, may retire to an encore career and find themselves in the studio instead of the office.

  An **involved spectator**: This is someone involved in the same area but there is a role shift to spectator.

  An **easy glider**: This is someone who spent their whole life devoted to a congregation, and would like to wake up and not have an agenda.

  A **searcher**: This person is asking questions like “where will I go next?” or “Where will I find my new niche or perhaps a different sense of community now that I am retired?”

  A **retreater**: In retirement this person may have difficulty identifying a new passion and may retreat into silence or isolation.

• With these in mind, consider how your identity may shift in this new phase. Where will you find support? How will you identify opportunities and new growth areas?

**Retiring Rabbi Engages the Board**

It is a best practice for the retiring rabbi to engage the lay leadership in conversations about the retirement. The retiring rabbi has served in a sacred partnership with the lay leaders, and as that partnership approaches its transition to a new relationship, the retiring rabbi should speak with the lay leaders about the nature of that new relationship. Resources to facilitate this conversation are available from the CCAR and the URJ.
The CCAR encourages our members approaching retirement to memorialize the new relationship in a retirement agreement or retirement contract in order to clarify expectations. These matters are of central importance to a smooth transition; the clear communication of expectations and limitations for all parties is the utmost priority. Transparency, fairness, and empathy ought to be the driving forces in the creation of these agreements.

The following points can help shape the conversation:

- Recognizing that the retiring rabbi will no longer be the rabbi of the synagogue, how might the retiring rabbi want to be active in the life of the congregation?

- How can the retiring rabbi assist the transition committee and the drafting of a transition plan?

- How will the written terms of the transition details be shared with the congregation? With the successor?

- The health of the relationship between the retiree and successor contributes to the success of the transition and the overall health of the congregation. Of course, the rabbis will be primarily responsible for this relationship, but in addition, who in the leadership should have responsibility to attend to the relationship between the retiree and the successor. How will leaders tasked with transition responsibilities be chosen?

- A best practice is for the retiring rabbi to take a physical hiatus. What options do you think would be in the best interest of your congregation?

- What will the new norms and expectations be for the retiring rabbi and how will those be communicated to the congregation?

- If there is an interim rabbi, how will the relationship between the interim and the retiring rabbi be negotiated?

- What challenges does the retiring rabbi foresee with this transition? How might the board and retiring rabbi address these challenges together?

- What lessons can we glean from the congregation’s previous history of retirees or emeriti?
Life cycle officiation is often a major flash point of conflict in transition planning so it is important to prioritize conversations on this issue. (See Appendix C) The following points should be noted.

- Life cycle ceremonies are rare opportunities for deep connection between rabbi and congregant. A successor rabbi should have every opportunity to connect with long-standing congregational families, even though and especially if those members feel a strong tie to the retiring rabbi.

- In our recent best practices document, the CCAR recommends that as a general principle officiation is the sole responsibility of the successor.

- In the first conversation, the retiree may explain to congregants that as a retired rabbi, officiation is not a possibility. Any request for officiation can then be turned back to the successor without placing the family directly in the middle of the conversation.

- We discourage the response, “You will have to ask my successor if I may officiate,” as this creates conflict; drawing congregants into a conversation that is the private purview between rabbis (and leadership where necessary).

- Both rabbis should clearly and consistently articulate the boundaries of life cycle officiation. If the retired rabbi does not wish to officiate at life cycle ceremonies, they must state this clearly to their successor.

- It is important to acknowledge that approaches to this issue will differ depending on the size, location, and specific needs of the congregation. If an exception must be made, then successor and retiree (and lay leaders where necessary) should have a conversation about how best to manage these relationships for the good of the congregation, and should come to an agreement.

Based on the above, these issues might be discussed by the retiring rabbi with their lay leaders:

- In light of these points, it is important to memorialize how life cycle will be handled after this retirement transition in the congregation. Discuss b’nei mitzvah, weddings, and funerals separately.

- How will decisions be made?

- How will these plans be recorded in transition documents?

- How will life cycle officiation requests from former members of the congregation be handled?
• What should happen if conflict should arise?

• In the case in which the retired rabbi is involved in a life cycle event for a family, how will the retired colleague assist the successor in building a relationship with those members?
Successor Rabbi Engages the Board

The following questions are intended to help the successor rabbi engage the board members before the rabbi’s arrival. During dialogue, the board and incoming rabbi are strongly encouraged to establish a rapport of openness and mutual understanding of expectations. The CCAR recommends that both the spirit and letter of the agreements between the congregation and retired rabbi be clearly communicated to the successor rabbi.

- Educate the board about the CCAR’s program for successors, “The First 100 Days,” and inform them of your intention to attend.

- Educate the board about the URJ’s Shallat Rabbinic Transition Program for congregations welcoming a new rabbi in their first year. Let them know of your intention to attend along with your president.

- Discuss with the board your ongoing need to find support in the transition, e.g., support from the CCAR, from colleagues, from private coaches.

- How will you facilitate meetings with the interim rabbi, if applicable? How will history and information from the interim’s term be shared?

- If the board engages a transition consultant, how will their findings be shared?

- A best practice is for a congregation to create a retirement policy and negotiate a retirement plan with a retiring rabbi (this may be a written retirement agreement and/or a contract). How can the successor obtain access to the retirement policy and any contracts or documents that have been negotiated for the retiring rabbi’s retirement plan?

- What challenges do you foresee with this transition? How might the board and successor rabbi address these challenges together? The board and the rabbi might review Module Four of the URJ’s Rabbinic Transition Roadmap together.

- What staff transitions are pending or likely in the near future? What are the plans for handling these transitions?

- What will be the successor rabbi’s authority to make staffing changes? What are the areas where the rabbi has the authority to make changes (personal assistants, staff, etc.). What are the staff concerns or sensitivities?

- What are the most important details that a successor rabbi should know about the congregation?
• If there is a retiree contract, how will it be enforced? If there is a conflict, who will be responsible for discussing/addressing an issue? How will resolution be discussed and addressed with the retired rabbi?

• Should conflicts between retired rabbi and successor rabbi arise, how should these conflicts be handled?
Board and CCAR Director of Congregational Search Services

The questions below are intended to open dialogue between the CCAR and congregations about how to meet the specific needs for the congregation’s circumstances.

- What are the advantages and disadvantages for a congregation like ours to engage an interim rabbi?
- How can the board access resources through the CCAR and URJ?
- What can the board reasonably expect in terms of the CCAR finding the ideal rabbinic match for the congregation? What if we don’t find our ideal rabbi this round?
- Where might the board find resources and assistance for contract negotiations with the new rabbi? What is the CCAR’s role supporting successor and retiring rabbis?

Retiring Rabbi and Successor Rabbi

Direct communication between the retiree and successor is ideal. Insights that the retiring rabbi can share are invaluable. Energy from the incoming successor is exciting. Questions and curiosities about the congregation should be welcomed by the retiring rabbi; the acquired wisdom of the emeritus/emerita should be honored by the successor. Establishing norms of mutually respectful and empathic communication between these two rabbis leads to a healthy transition. The CCAR considers these questions an effective starting point to establish such norms.

- What are the best ways we can begin to get to know one another?
- What reasons are there for us to stay in communication with each other? What kinds of communication are best? Face-to-face? Text? Phone? Email?
- How should conflicts be handled? Who else should be involved?
- How will life cycle events be handled? (Note: Life cycle is often a major flashpoint and it is important to acknowledge that approaches to this issue will differ depending on the size of the congregation.)
  - Discuss separately b’nei mitzvah, weddings, funerals.
  - How will decisions be made?
  - If the retiree does a life cycle event for a family, how will the retired colleague assist the successor in building a relationship with that family?

CCAR
o How will the retiree respond when congregants request life cycle event officiation? Language and protocol need to be established and memorialized in writing.

- How can the successor help the retiree protect her/his time?

**Successor to Rabbinic Spouse/Partner**

K’vod harav extends to the retired rabbi’s partner or spouse. The spouse/partner has often been deeply involved in the life of the congregation. It is important for the successor rabbi to understand the retired rabbi’s spouse/partner’s role in the culture of the congregation.

- Tell me how you have been involved in the congregation.

- Assuming it is acceptable to the lay leaders, how do you see yourself involved in the synagogue in the future?

**Reflection Topics for Successor Rabbi**

This section is provided to encourage successor rabbis to consider aspects of the next chapter of their lives. Successor rabbis should enter into this transition with a full understanding that change is hard, and there are often feelings of grieving and loss for members and leaders when there is a rabbinical transition, even if the transition is well planned. Emotional and pragmatic elements play into creating clarity moving forward. Clarity in your own intentions and the plans that the congregation has made for this transition will aid you as you work to establish new relationships to help anchor your new rabbinate in the congregation.

- What have your thoughts been regarding your transition? Are there issues of concern? Excitement? Worry?

- How will you best learn about the rabbinate of your predecessor? What programs were important to your predecessor? If changes are necessary, who are the major stakeholders and how would your predecessor be impacted? (Note: This set of questions may be important as points of information but are not intended to be decisive in any way).

- How can you make the retiring rabbi feel valued in the congregation even as roles are changing? How can you deepen your relationship with your senior colleague through ongoing meeting or study? How will you demonstrate kavod harav for your retired colleague within your community?
• How will you work with the transition committee? What is the best way for you to receive feedback from the transition committee? From the congregation?

• Consider your support system. What would be the advantage or disadvantage of working with a rabbinic coach in transition? Do you have rabbinic mentors and friends upon whom you can call? The transition of a long tenured retired rabbi to successor colleague is a complicated one. It is important for you to have a strong support system in place as you navigate the transition ahead.

• What are the details of the contract or transition agreement that the congregation has already made with the retiring rabbi? How do these details impact on you? Which terms in that contract may require clarification between you and the leadership?

• Life cycle officiation is often a major flash point of conflict in transition planning so it is important to prioritize conversations on this issue. The following points should be noted:
  
  o Life cycle ceremonies are rare opportunities for deep connection between rabbi and congregant. A successor rabbi should have every opportunity to connect with long standing congregational families, even though and especially if those members feel a strong tie to the retiring rabbi.
  
  o In our recent best practices document, the CCAR recommends that as a general principle, officiation is the sole responsibility of the successor.
  
  o In the first conversation, the retiree may explain to congregants that as a retired rabbi, officiation is not a possibility. Any request for officiation can then be turned back to the successor without placing the family directly in the middle of the conversation.
  
  o We discourage the response, “You will have to ask my successor if I may officiate,” as this creates conflict drawing congregants into a conversation that is the private purview between rabbis (and leadership where necessary).
  
  o It is important to acknowledge that approaches to this issue will differ depending on the size, location, and specific needs of the congregation. If an exception must be made, then successor and retiree (and leadership where necessary) should have a conversation about how best to manage these relationships for the good of the congregation.

• In light of these points, it is important to memorialize how life cycle will be handled after this retirement transition in the congregation. Discuss b’nei mitzvah, weddings, and funerals separately. How will decisions be made? How will these plans be recorded? What should happen if conflict arises? In the case where a retired rabbi is involved in a life cycle event for a family, how will the retired colleague assist the successor in building a relationship with those members?
• If a conflict arises between you and the retiring rabbi, how will it be negotiated? Who will be involved?

• What has the involvement of the rabbinic spouse/partner been in the congregation historically? Have you had a discussion with your own spouse/partner (if applicable) about intentions for involvement, and congregational expectations? We also recommend having a discussion with the retiring rabbinic spouse/partner (see question above).
RETIREMENT AGREEMENTS

The Task Force on Retiree-Successor Relations has studied the issue of retirement contracts, determining that having such a contract is essential to a successful retirement and transition to a successor. A retirement contract is an agreement between a retiring rabbi and the congregation that spells out with specificity the mutual benefits and the obligations of the retired rabbi and the congregation. In addition, some congregations have created a separate emeritus/emerita policy which addresses many of these issues.

The best practices below have been culled from our research and from extensive interviews, and are not intended as legal advice.

The first best practice is to seek out advice, especially legal and financial counsel, from professionals with experience in the area of rabbinic retirement.

Regarding a retirement contract, our recommendations include:

- To consult the Rabbi’s Contract Checklist on the CCAR website;
- To have a retirement date in mind when you are in your early- to mid-50s, and to have a more final end date in mind while providing the option to retire earlier if you wish;
- To be intentional about preparing your lay leaders and congregants for your retirement so that they understand the role of an emeritus/emerita and the transition process; this would include sharing materials and engaging in conversations before you begin negotiations;
- To help the lay leaders understand the value of a retired rabbi;
- To be intentional about preparing yourself and your family for retirement especially in regards to emotions and finances;
- To give thought to both the economic and non-economic terms of the desired contract before negotiations begin;
- To negotiate your retirement contract at the same time that you are negotiating your final contract and not to negotiate the retirement contract just a year or two before retirement;
- For the rabbi, perhaps in consultation with an attorney, to be the one who proposes the terms of the contract, including compensation for teaching or other services;
• To determine whether a stipend from the congregation is appropriate, taking into consideration: the congregation's annual 15% contribution to the Reform Pension Board; the retiring rabbi’s ongoing responsibilities to the congregation; and the congregation's financial abilities;

• To incorporate, by reference, the retirement guidance of the Guidelines on Rabbinical-Congregational Relationships (the “Gold Book”);

• To prioritize and negotiate for these important benefits:
  
  o Health insurance
  o Annual convention allowance
  o Information technology, including cell phones, computers, access to the congregational network

• Additional negotiation points should include:
  
  o Resolving issues around unused sabbatical and vacation time;
  o Incorporating in the contract a dispute-resolution mechanism that specifies an agreed-upon formal mediation process;
  o Incorporating language in the contract regarding what might happen in the event of a merger between the congregation and another congregation.
CASE STUDIES IN RETIREE-SUCCESSOR RELATIONS

We have assembled these case studies from pieces of stories that have been reported to us. As they stand now, they are composites, and they do not reflect any rabbi’s actual situation. We provide them and the questions as conversation starters for retirees, spouses, successors, and lay leaders to have with one another. Discussing these dilemmas before they arise will shed light on the issues at stake.

1. When Rabbi Retiree announces their retirement, Rabbi Retiree negotiates a retirement agreement that grants the Rabbi Retiree the creation of a new discretionary fund called the Rabbi Emeritus Discretionary Fund. When Rabbi Successor arrives, they will inherit the existing Rabbi Discretionary Fund. Just prior to Rabbi Retiree’s retirement date, Rabbi Retiree moves all the funds from the Rabbi Discretionary Fund into the Rabbi Emeritus Discretionary Fund. Rabbi Successor assumes their position as rabbi and discovers that the Rabbi Discretionary Fund has no money in it. Rabbi Successor says to Rabbi Retiree, “Why did you drain the discretionary fund? That money was meant for the use of the rabbi of the synagogue, me.” Rabbi Retiree replies, “The money in the fund was donated for services that I have provided. It was given for my use, not yours.”

   a. What concerns lie behind Rabbi Successor’s objections? Behind Rabbi Retiree’s response?
   b. How could this situation have been avoided?
   c. Now that it has happened, how can or should this situation be resolved?

2. Rabbi Successor worked hard to create a major celebration for the synagogue’s 75th anniversary. The rabbi invited all the synagogue’s previous rabbis to attend, including Rabbi Retiree, who was named emeritus/emerita a few years earlier. Rabbi Retiree expected to have a role in the Shabbat service, but Rabbi Successor assigned Rabbi Retiree only an ark opening. When Rabbi Retiree asked for a more significant part, Rabbi Successor said that the current clergy were going to lead services so the congregants would see them as the synagogue’s klei kodesh.

   a. What considerations should go into the assignment of such roles?
   b. How could communication on such matters best be framed?
   c. What might a service look like that both honors the past, but anticipates the future?

3. In a small single-synagogue town, Rabbi Retiree goes into retirement and does not inform the local Jewish funeral home that they are now retired and the synagogue has a new rabbi. When a Jewish death occurs, the funeral home director calls Rabbi Retiree out of habit. So Rabbi Retiree is the first to be invited to do funerals. Rabbi Successor learns of this practice and calls the funeral director to let them know of the new rabbi. The funeral director responds, “But we have always called Rabbi
Retiree and we have a great relationship with them. Everyone wants Rabbi Retiree to conduct their funeral.”

a. Is there a “typical” relationship between a funeral home and a synagogue?
b. Is there an “ideal” practice regarding member funerals and non-member ones?
c. Does parnasa for either Rabbi Retiree or Rabbi Successor play a role in determining best practices?

4. Rabbi Retiree has had a long and close friendship with congregant Joe Peloni. Mr. Peloni fell extremely ill and was hospitalized. Rabbi Successor visited Mr. Peloni several times during his stay in the hospital, but even though Rabbi Successor was aware of the friendship between Rabbi Retiree and Joe Peloni, Rabbi Successor never informed Rabbi Retiree of the illness. Rabbi Retiree was angered and called Rabbi Successor, who said, “I am the rabbi of the synagogue and I am now Mr. Peloni’s rabbi, not you. I am under no obligation to keep you informed of our congregants’ lives, and you should not be doing hospital visits.”

a. Should retired clergy receive life cycle notifications as current clergy do?
b. How might have Rabbi Retiree have addressed the matter differently?
c. How might Rabbi Successor have responded differently to Rabbi Retiree?

5. Temple Chaim’s building has offices for two rabbis. For the senior rabbi, there is a large, well-appointed office with a restroom, walls of bookshelves, and a large table with comfortable chairs for meetings. For the second rabbi, there is a medium-sized office with a large desk, a small meeting table, and sufficient shelving space for the second rabbi’s books. As the senior rabbi goes into retirement, the retirement agreement guarantees continued use of the senior rabbi office. The second rabbi, who has now been engaged as the new senior rabbi, has been told that they will remain in their current office. Rabbi Successor, the previous second rabbi, is unhappy with the arrangement, thinking it projects the image that Rabbi Retiree is still in charge. Rabbi Retiree believes that keeping the large office is a sign of k’vod harav.

a. What considerations should go into the designation of a Rabbi Retiree’s study?
b. How should lay leaders approach such specific issues as this?
c. Is there a best practice to such an arrangement?

6. Rabbi Retiree remains active in the Jewish community outside of the synagogue. As part of these activities in the Jewish community, Rabbi Retiree is organizing a mission to Israel. Rabbi Retiree has booked a trip to Israel without informing Rabbi Successor who is trying to promote a congregational trip to Israel at the same time. Rabbi Retiree’s trip is attracting synagogue members, and Rabbi Successor’s trip is now in jeopardy of failing for lack of participants. When Rabbi Successor asks Rabbi
Retiree to stop, Rabbi Retiree argues that they are not soliciting synagogue members and that synagogue members are free to choose which trip they wish to go on.

a. What clarifications in a congregation’s agreement with its Rabbi Retiree might prevent such conflicts?
b. When no such agreement exists, what considerations should each colleague have for the other regarding broader communal engagement?
c. Is there a difference between soliciting synagogue members and merely accepting them?

7. The father of members of the synagogue has died. Although the father was no longer a member of the synagogue, the adult children still are. The adult children reach out to Rabbi Retiree to conduct the funeral because the father had a warm relationship with Rabbi Retiree while he was a member. Rabbi Retiree leads the funeral and afterward lets Rabbi Successor know about the death and the funeral. Rabbi Successor is upset to learn about the death and the funeral, but Rabbi Retiree says that they are within their rights to perform funerals for non-members.

a. Should Rabbi Retiree have handled this differently?
b. Can such procedures be spelled out in contracts or letters of agreement, and when they are does doing so prove effective?
c. Can the funeral home play a role in ensuring full notification?

8. When Rabbi Retiree 1 retired from the synagogue, the retirement agreement guaranteed the rabbi the right to deliver one major High Holy Day sermon. When Rabbi Retiree 2 retired from the same congregation, the retirement agreement guaranteed Rabbi Retiree 2 also one major High Holy Day sermon. When Rabbi Successor came on board, they learned that they would be delivering only two of the four major High Holy Day sermons. When Rabbi Successor took the problem to the lay leaders, their response was, “There’s nothing we can do. We’re obligated to follow the terms of the retirement agreements.”

a. What sort of guidance can the CCAR make available to congregations on such matters?
b. How might the Rabbi Successor approach his predecessors to address their contracts and his or her own needs?
c. Are there other ways for the Rabbi Successor to achieve the goals of relationship building and agenda setting over the High Holy Days while still honoring the spirit of the retirement agreements?

9. Rabbi Retiree enthusiastically supported the appointment of Rabbi Successor. At the first Rosh HaShanah service, Rabbi Successor delivered a sermon on Israel that reflected a very different perspective on Israel from Rabbi Retiree’s. Rabbi Retiree
then wrote an angry letter to the synagogue president, criticizing the sermon and insisting that the board dismiss Rabbi Successor immediately.

a. What should the president say to the Rabbi Retiree?
b. Did the Rabbi Retiree do anything inappropriate?
c. Whether the Rabbi Retiree was in the right or the wrong, what can the Rabbi Successor learn?

10. Although Rabbi Retiree has gone into retirement, the rabbi’s spouse remains active in the synagogue. In fact, the spouse was appointed to the search committee to select Rabbi Retiree’s successor. When some lay leaders objected, the spouse replied, “The rabbi has retired, not me. Why can’t I stay involved in this community that I have loved and served for many years?”

a. What should be the role of the rabbi’s spouse/partner in the congregation?
b. Does it change when the rabbi retires?
c. What sorts of boundary best practices exist in congregations today?
SELECTED BIBLIOGRAPHY ON CLERGY RETIREMENT

AGING AND RETIREMENT IN GENERAL


CLERGY RETIREMENT


NEXT STEPS

**PHASE I**

1. Engage the National Association of Retired Reform Rabbis (NAORRR) in reflecting with the Task Force on the issues raised in this handbook, and include feedback in final handbook;

2. Incorporate feedback from convention into a final document;

3. Make this handbook easily accessible on the CCAR website on the public-facing page.

**POSSIBLE PHASE II**

1. Establish a safe place for messy situations before they go to the Ethics Committee, e.g., an advisory group to air concerns, an intermediate mediation process to avoid going to Ethics Committee;

2. Engage the Rabbinic Careers Office and the Rabbinical Placement Commission with the goal of incorporating the best practices recommendations in the placement process;

3. Work with the Reform Pension Board, e.g., integrate the best practices into the RPB Retirement Seminar;

4. Implement a mentoring program for retirees and create a program for successors;

5. Include discussion of successor and retirement issues in the HUC-JIR rabbinic curriculum.
APPENDIX A: NEGOTIATING A RETIREMENT CONTRACT

We are pleased to append this outline on retirement contracts prepared by Michael Gan and reproduced here with his permission. The Task Force expresses our thanks to Michael for his generosity. This document represents an ideal situation that might not be attainable in every situation.

Negotiating Your Retirement Contract

Michael J. Gan
Peer, Gan & Gisler LLP
Washington, DC
2018

Preplanning and professional advisors

- Accountant, financial planner and other advisors, counsel
- Looking at your current agreement and obligations; CCAR Bylaws

Educating lay leadership on the subject of emeritus/emerita status and retirement contracts generally

- Other considerations: tenure in the particular job, relationship with lay leaders

Timing of retirement contract negotiations—don’t wait until it is too late

- The earlier the better for their planning (and funding) and yours
- Talking to the “right” board—negotiation dynamics

Announcing your retirement date

- Only after your retirement contract is successfully negotiated

Finding the right narrative

- What does the Movement say?
- A “thank you for past service” has not worked well since at least 2008
- Tangible benefits you can offer in exchange, including the importance of fundraising and development in retirement

The specifics of your retirement contract might include:

1. Rabbi emeritus/emerita status—“Gold Book” (Guidelines for Rabbinical–Congregational Relationships) is relevant; includes lifetime membership at temple
2. Lifetime health insurance for rabbi (and spouse/partner); at age 65, temple pays for Medigap insurance policy/prescription drug plan (Medicare Part D); Medicare premiums

3. Lifetime long-term care insurance; temple assumes premium at retirement

4. CCAR dues paid by temple

5. Convention allowance—amount and duration of benefit

6. Use of office; secretarial assistance—as needed so as not to interfere with full-time clergy

7. Unused sabbatical payout at end of agreement

8. Rabbinic duties; any continuing obligations? Compensation for regular and recurring post-retirement duties

9. Facilities naming rights (think United Center); one rabbi had library named after him; another had the chapel, etc.

10. Website, letterhead, other publications

11. Laptop and/or desktop computer becomes property of rabbi

12. Retirement “salary” or Office of the rabbi emeritus/emertia—a stipend paid annually to rabbi (not typical)

13. Burial plots for rabbi (and spouse/partner) in temple-owned cemetery

14. Mergers and changes of form

15. Why do I still need good dispute resolution language?
APPENDIX B: THE INTERIM-RETIREE RELATIONSHIP

The interim-retiree relationship is unique. Hiring an interim rabbi helps to ensure a healthy transition to a new rabbi. The interim rabbi serves a transition term (often one year, but occasionally more) in order to primarily bring closure to the tenure of the retiree and support the congregation as it envisions and works toward its future, engaging in a successor search and preparing for their arrival. The interim rabbi also facilitates the retiree's entrance into retirement and their new role. The relationship between the retired rabbi and the interim rabbi is grounded in:

- *K'vod harav*—mutual respect, compassion, professionalism, and congruent goals between rabbis; and
- *K'vod hak'hilah*—each rabbi's respect of and concern for the congregation and its long-term best interests as it prepares to integrate an incoming settled rabbi.

Such respect is substantiated through:

- Collegial and cordial connections between the interim rabbi and retired rabbi, commencing just after the selection of the interim rabbi;
- Open and ongoing communication between the interim rabbi, the retired rabbi, and, when appropriate, the synagogue president;
- The recognition of the retired rabbi as a vital, though not sole, source of institutional memory regarding congregational history, policies, practices, and procedures;
- The interim rabbi’s concern for the welfare of the retired rabbi and, when present, rabbinic spouse/partner;
- An appreciation of the congregation’s and the retired rabbi’s history together and emotional ties to one another;
- An acceptance by the retired rabbi that another rabbi is now *mara d’atra*, and an active affirmation of such to the congregation;
- An agreement that truth-telling is important and that the interim rabbi will be blunt with the retiree about the truth;
- The understanding that a congregation is a multi-dimensional system of emotionally balanced relationships, relationships which cannot be ignored or dismissed during transitional times; and
- Patience and forgiveness—recognizing that transition is an ongoing work in progress for rabbis as well as for the leadership and membership.

A Learning Opportunity

The true nature of the interim-retired rabbi relationship is complex, multi-balanced, and sometimes not fully fleshed out until a crisis arises. This thus presents a learning opportunity for both, as the retired rabbi transitions to their new role. After all, the retired
rabbis enter retirement with their own conscious and unconscious needs, their unexpressed expectations, degrees of preparation, and identity flexibility. Some are retiring by choice while others are not. Whether moving far away or staying put, retired rabbis most often retain a strong identification and emotional connection with both the congregation and select congregants. Interim rabbis too have their own histories, personality traits, and expertise.

The interim rabbi can aid the retired rabbi in navigating the first year of retirement during which the retiree should have minimal presence in the congregation. The interim can encourage the retiree to accept that under the settled or successor rabbi, the congregation may well move in new directions, creating a congregational identity much different from the one created by retiree. The congregation may also adopt a new staffing model or a new organizational model, restructuring the models built by the retiree. If there are new programs and new rituals not to the retiree’s liking, the interim can guide the retiree in anticipating and accepting the settled rabbi’s possible changes.

All these factors shape the transitional term for the interim-retired rabbi relationship and make it a laboratory for experimenting, practicing, and modeling best practices in rabbinic retirement. Instances in which best practices are not followed also provide learning opportunities to be analyzed, compassionately discussed, and corrected.

**Dialogue**

Best practices assume that the interim rabbi has seen the retiree’s retirement agreement with the congregation and examined with the synagogue president the terms of the retired rabbi’s relationship with the congregation and congregants. The interim will hold this information in absolute confidence. For those retirees who do not have a formal retirement agreement, the interim year can be a time for clarifying the retiree’s relationship with the synagogue.

The interim rabbi and the retiree should meet initially to get to know one another and then to identify and address the issues at hand. Both should assume good faith in the each other as they explore shared goals, such as the retiree’s fulfilling retirement and the onboarding of the successor rabbi. Other issues might include avoiding miscommunications and misunderstandings, articulating the retired rabbi’s unmet wants and needs, and the appropriate role of the retiree’s spouse.

**Consultation**

When productive discussions between the retired rabbi and interim rabbi do not or cannot proceed, outside consultation may be in order. The CCAR Director of Rabbinic Career Services can be a source of information and advice.
APPENDIX C: RETIREES, SUCCESSORS, AND LIFE CYCLE CEREMONIES

Most of these love triangles are wrecktangles. – Jacob Braude

Ed Friedman reminds us that rabbis are constantly triangulated in synagogue systems. This is especially true for retirees, their successors, and congregants over officiation at a wedding, a funeral, a bar or bat mitzvah, or some other life cycle event. Indeed, no other event erupts more heatedly into conflict between retiree and successor than life cycle officiation.

Why do life cycle events reach such flashpoints? Because there are multiple interests among multiple players with intense emotional involvement.

- A successor has a legitimate interest in establishing themselves as the authoritative rabbi of the community and in building long-term relationships with the members;
- The retiree has an interest in maintaining a friendship with a congregant of longstanding and in engaging in a rabbinic activity that brings meaning and fulfillment;
- Congregants are invested in the sacred and emotional moment of the life cycle and may be caught in their own family conflicts. They want to continue their relationship with a beloved rabbinic figure with all the emotional layers that rabbi may represent;
- The lay leaders all too often default to the rabbis to resolve this conflict. In large measure, the lay leaders’ own conflict avoidance keeps them from intervening when a life cycle conflict occurs between successor and retiree. Synagogue systems are notoriously conflict averse.

No wonder the emotional field surrounding life cycle officiation is a minefield.

We affirm this principle: that the goal of the transition is to establish the successor as the rabbi of the synagogue. The traditional rabbinic phrase is the mara d’atra or marta d’atra, the rabbinic leader of the place. This principle should guide retiree, successor, and lay leaders in all their dealings especially life cycle officiation. Everyone should ask themselves, does this course of action support or obstruct the successor’s role as the mara/marta d’atra and the overall well-being of the synagogue?

The conflict over life cycle officiation often appears to a third party as a power struggle between retiree and successor. In fact, its roots lie deep within the synagogue system and are fed by many factors. For this reason, conflict over life cycle officiation can cause enormous disruption in a community. Recognizing this and dealing with the potential for conflict holistically and early is the best way to ensure a successful transition for the successor and a fulfilling retirement for the retiree. Also, a pre-agreed-upon
communication plan between the retiree and the successor can mitigate the potential for conflict.

The retiree should never say, “Let me check with my successor. If it’s okay with her, I will do it, but I have to ask permission.” This approach has the potential to create conflict and puts an unfair onus on the successor.

Because this is a difficult situation to navigate, we offer these sample scripts and general principles for guidance:

1. That the retiree, before retirement, educates the congregation about the meaning of the rabbi’s retirement, the successor’s responsibility for life cycle ceremonies, and the retiree’s unavailability to perform them;

2. That the retiree enters into intentional conversations before retirement regarding life cycle officiation with lay leaders and affirms the establishment of the successor as the mara/marta d’atra;

3. That the successor educates themselves in transition management and participates in these conversations as soon as she or he is known. The conversations might refer to the scenarios in our document or other scenarios in order to explore the best way to deal with life cycle officiation and to anticipate the gray, ambiguous situations;

4. That the retiree, beginning before retirement and continuing well into retirement, seeks spiritual and emotional guidance to find meaning and fulfillment and to let go of the role as rabbi of the community;

5. That the retiree abides by this principle: the retiree should approach all life cycle requests with a bias towards not accepting them because a life cycle is an important connection point for the successor to establish a relationship with a congregational family. If, however, the retiree wishes to consider the invitation, the conversation might go like this:

   **CONGREGANT:** Rabbi, can you perform my father’s funeral?  
   **RETIREE:** I’m so sorry to hear that he died. Have you begun to think about the funeral? What are your thoughts?  
   **CONGREGANT:** We were hoping you could do the funeral.  
   **RETIREE:** Thank you for thinking about me. Let me get back to you. Don’t set a time for the funeral until you check back with the temple to see who can officiate.  
   **CONGREGANT:** Well, when are you available?  
   **RETIREE:** At this moment I am not sure. I’ll get back to you within a few hours. Please send my love to the whole family. Your father was such a special man.
Retiree should then call successor to ascertain that successor knows about the death and have a conversation about the funeral.

- It might be in the best interest of the temple for the successor rabbi to be the main officiant, do the intake, and preside at the funeral as a way to create a connection with the family.

- It may be in the best interest of the temple for the successor to invite the retiree to co-officiate. One rabbi will preside and the other might participate by reading a prayer or saying a few words in addition to the eulogy.

- Less common are cases in which the successor encourages the retiree to officiate and do the intake on their own.

Principle: The decision is ultimately the decision of the successor, taking into consideration what is best for the synagogue as well as the feelings of the mourners.

- In the case of a successor who wants to refer a life cycle event to the retiree, the successor should check with the retiree as to the retiree's interest and availability in performing life cycle event before making the referral.

Depending on the decision point, after this decision is made, the retiree may call the mourner:

1. In the case in which the successor will be the main officiant, the retiree says: “I’m so sorry but it is not possible for me to officiate. Rabbi ____ (successor) will call you to work out the details of the service. I am sure that they will lead a beautiful funeral and guide you through shivah. I hope to see you at shivah (or, I will check in on you over the next few days) and I know the funeral will be meaningful with Rabbi ____ (successor) leading.” Under no circumstances should the retiree feel obligated to offer an explanation or indicate that this was the decision of the successor.

2. In the case of co-officiation: “Rabbi ____ (successor) will officiate at the funeral but I will be there and participate. They will call to set up a time to meet with you and your family to plan it.”

3. In the case where the retiree will officiate: “I would be honored to officiate. Rabbi ____ (successor) was sorry to hear about your loss.”

Principle: Successors should be in touch with and actively supporting the mourners even if that rabbi has decided that the officiation of the retiree is in the best interest of the congregation.