

FINISHING WELL  
Retirement Skills  
Purposes, Plans, Goals

Retirement Workshop  
Evangelical Friends Church-Eastern Region  
15 July 2022

PERSPECTIVES
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**I. TRANSITION PROCESS**

Key word: PROCESS.....not a point in time but a process....

-Transition feels like: Trapeze

-Retirement transition can be complex

-Transition phases:

1. Moving out of usual, normal, known situations
2. Adjustment to new reality
  - awkward, struggle
  - shock /disbelief (it's not time to retire)
  - projection (blame, anger, rage)
  - withdrawal or intense activity and control (hard to let go)
  - guilt (did I do something wrong)
  - rationalization (looking for justification)

-General tips on transition

~Try to see the reality of the situation. Ask someone to journey with you to give you perspective.

~Face any illusions that might be clouding the situation

~Seek to hold life and the transition process lightly and gently

~Ask God what He has for you in this experience.....What are some of His redemptive purposes

~**Build your RAFT** to navigate the unknown waters between solid ground (*Third Culture Kids*. Pollock and Van Reken)

**R = Reconciliations:**

recognize/acknowledge challenging relationships; "take out the trash", repair the broken places; restoration might not be possible but make the effort to reconcile/resolve; Romans 12:18 *if possible, so far as it depends on you, live peaceably with all people.*

**A= Affirmations:**

appreciating and acknowledging who and what matters to us, and recognizing we can identify positives, even during challenging times.

**F= Farewells:**

to enter well we must leave well; focus on what we are leaving behind...HONOR the goodbyes; people, please, pets, possessions

**T = Think Destination:**

as you leave well, plan how to enter well. Face what comes next with openness; examine your expectations (negative /positive);

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\*Note you can download a RAFT handout developed by Linda A. Janssen on this website: <https://figt.org/resources/Documents/2020-Conference/RAFT-ExerciseHandout-2020Mar14.pdf>

## II. PURPOSES

~What is Successful retirement?

Exercise: do a mind map to illustrate what you consider as components for a successful retirement. Write major themes and their subsets.

“Successful retirement occurs when an individual is able to thrive physically, vocationally, socially, and spiritually in retirement.....”

.....“Successful retirement embodies the intentional planning and development of a new transitional lifestyle in which the retired minister grows more productive and thrives more than any prior chapter of life.” *“Finishing Well”*, p. 4

**Plan with three purposes in mind:** (Finishing Well, p. 42-43)

-Plan for retirement while you still feel well and remain free from the effect of any crisis.

-Adjust to unexpected changes ...by referencing and updating your existing plan as the unexpected events and crises occur. Don't discard your existing plan due to an unexpected crisis. Simply update it.

-Periodically update your plan on a predetermined schedule (at least every two years ) to account for new opportunities.

## III. PLANNING is foundational

”Structure and schedule act as primary antidotes to the chaos and stress of leaving and transition. Structure develops as the minister builds specific personal plans across all the domains of a healthy life. “ (Finishing Well, p. 42)

-Allow 5-8 years to walk through the various stages of retirement

- Factors to consider in the time and complexity of planning needed

- a. Scope of the change anticipated
- b. Personal factors

-Preparation is as important and intentional as the training needed prior to when we first entered ministry

## IV. Stages of retirement transition

Source: “Finishing Well”

- A. Involvement Stage
- B. The Leaving Stage
- C. The Transition Stage
- D. The Entering Stage
- E. The Re-Involvement Stage

**FINISHING WELL**  
**Retirement Skills**  
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**GOALS**

**GOALS** : how to walk out the purposes and plans with specific actions

“Retirement can easily continue for up to one-fourth of one’s lifetime. Plan your goals purposefully.” (Finishing Well, p 42)

Various ways to approach goal-setting; choose what works best for you. Bottom line —-DO IT!

**Specific areas for goal -setting**

**A. Logistical**

1. Financial

- ~adequate support, taxes, insurance (life, health, long-term care) , asset protection;
- ~dealing with government agencies (social security)

2. Legal

- ~wills/ executor(s) , power of attorney (general and/or limited for specific transactions), estate protection /tax implications (probate) ; record-keeping and important documents (electronic —-passwords, etc. and hard copy);
- legal representation and assistance

3. Health

- insurances (including long-term care)
- health care power of attorney
- health care directives/living wills (check State legal requirements) - check on updates 3-5 years
- Medicare

4. Living arrangements (short/long-term)

- Be willing to ask the “what if” questions.....

5. Miscellaneous things I never thought about!

- ~What will my spouse/family need to do upon my death
- ~Retiring single

**B. Relational**

Suggestion: Map your relationships to assess the strength of your support network. Make a plan/goals to strengthen and/or transition relationships.

~ Heart relationships—

-spouse, family, friends

~ Ministry/Job Role relationships

Authorities/leaders, peers, those under my stewardship;  
Organizational relationships  
Leadership transition  
Mentors/mentees

How will these relationships change as I step out of my current ministry/job roles?

## FINISHING WELL

### Retirement Skills

#### Purposes, Plans, Goals

What needs to end? What needs to continue? How to know the difference?

How to bring closure? How to make changes?

- ~ “Logistical” relationships
  - Service providers/resources
  - legal/financial
  - Medical
  - Care (giving and receiving)
- ~ Community, neighborhood, other relationships
- ~ Building NEW relationships

#### 3. Lifestyle: Emotional, Mental, Physical

-stability, growth, thriving

#### 4. Ministry, Service, growth: Thriving not surviving

#### 5. Spiritual - relationship with Father, Son, Spirit

**“See your retirement as a gift from God. Retirement isn’t something that just happens if you live long enough, and it isn’t even a reward for your years of hard work; it is a gift from God. Once you understand this, you will approach your retirement differently. God gave these years to us - however few or many they turn out to be—so that we could do His will.”**

Billy Graham, *“Nearing Home”* quoted in *OMS Transition booklet*

\*Sources:

~“Reflections on the Transition to Retirement: Exploring the Spiritual/Mental/Emotional Horizons” booklet prepared by One Mission Society for Transition Workshop, 2005.

~ “Finishing Well: Retirement Skills for Ministers” by Nathan Davis and Beth Davis. 2008.

~ The RAFT model is from *Third Culture Kids: Growing Up Among Worlds* by David C. Pollock, Ruth E. Van Reken, and Michael V. Pollock (3rd ed), Nicholas Brealey Publishing, 2017.

## What Will I Do With the Rest of My Life?

My Plan (Goals) for a thriving, healthy life in retirement		Resources/Action needed
<b>Lifestyle</b>	Emotional	
	Mental	
	Physical	
<b>Meaning</b>	Ministry	
	Service	
	Growth	
<b>Spiritual</b>	Relationship with God	

## What Will I Do With the Rest of My Life?

As you enter the later stages of earthly life, you bring wisdom, experience, and maturity to whatever you set your hand to do. What would you like to do, experience, accomplish before it is too late to do it? What/Who do you have/need to help you do it?

**Mission Statement: My retirement life mission is:**

My Plan (Goals) for a thriving, healthy life in retirement		Resources/Action needed
<b>Logistical</b>	Financial	
	Legal	
	Health	
	Living arrangements	
	Miscellaneous	
<b>Relational</b>	Heart relationships	
	Ministry/Job/Role relationships	
	Logistical relationships	
	Community, neighborhood, other relationships	
	Building NEW relationships	

## GRIEVING WELL

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*“Any job change, especially retirement for a minister, can stimulate intense grief. The minister grieves not only about losing a job assignment and close relationships, but about the potential of losing his or her God-given identity as a minister.” Finishing Well. p. 73.*

### THOUGHTS for the JOURNEY

#### ~Embrace the Journey with Immanuel—God WITH us

- Grieving with gratitude
- Grieving holistically: mind, emotions, spirit, body

#### ~Be informed about the grieving process...know what to expect

- Emotions
- Time ( as long as it takes) but don't get stuck in unresolved grief
- Process
  - Various models are used to describe the grief process. These are no longer called “stages” because we may experience them in any order. Some we may revisit over and over or even skip some entirely. As a way of explanation, they are laid out in traditional sequence.

#### 5 RESPONSES to grief

- Denial:
  - shock, disbelief, protest
- Anger:
  - irritable, withdrawn, demanding, questioning God
- Bargaining:
  - making promises or resolutions or ultimatums and threat in an attempt to regain control of circumstances and try to get a grip on reality
- Depression
  - hopeless, guilt, extreme sadness, indifference, low energy, loss of libido, sleep disturbance and loss of appetite
- Acceptance
  - There is no “cure” or getting over it....but we gradually learn to accept it....

#### ~Be intentional ....

- grieve as you go
- “goals” for grieving/saying good-bye
  - keep the RAFT method in mind (see note below for explanation)

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### ~Be relational

-invite trusted people to accompany you in the process

### ~Be open to facing the past

....so you can move into the future without unneeded "stuff"

-go back as far as needed....Jesus is present

-recognition is the first step in healing and transformation.....

-cumulative losses.....

you might not have had time, energy or wisdom to grieve those losses....."big or small"

-trauma, wounds, unresolved issues, "failures", and unmet needs

seek help from a counselor, spiritual mentor, or prayer minister....as long as you are "able minded, there is no "too late" in God's timing to release burdens and walk in greater freedom....

"There's always an Egypt that needs a good-bye" Joyce Rupp

### ~Be present to your heart and the Presence of Father, Son, and Holy Spirit

-Four aspects of PRAYING a good bye- (Praying our Goodbyes, Joyce Rupp, p. 72)

Recognition

—name the pain and loss

Reflection

—make time alone, with God, with others; connecting the loss within to the mystery of God and the human condition; journal/ write your own lament

Ritualization

—actions, objects, tangibles give concrete expression and connection to the loss

Reorientation

—nurturing the healing

"Too often we can ignore a goodbye or fight it or push it away, but we do not get rid of the ache in this way. It keeps raising its voice inside us, at times when we least expect. It drowns out the voice of joy in our life, bleeds our spirit of energy and enthusiasm; it destroys belief in our ability to rise from the ashes of our pain.

We need to acknowledge the ache of our goodbyes and to approach them in a way that leads to personal growth. When we pray a goodbye we do more than just pray *about* a loss. Praying *about* it is to keep it out there, apart from us in some sense. When we truly pray a goodbye we enter into the whole matter; we live it. We connect our life with God

## GRIEVING WELL

and bring our pain into that intimate relationship, and know that the touch of God is the touch of healing.” (Praying our Goodbyes, Joyce Rupp, p. 73)

### Sources:

- 1) “Helping Others Grieve Well” Module from Sharpening Your Interpersonal Skills notebook by Kenneth Williams. Published by: International Training Partners, 2016
- 2) *Praying Our Goodbyes*. Joyce Rupp. Ivy Books. 1988.
- 3) *Finishing Well: Retirement Skills for Ministers*. Nathan Davis and Beth Davis. 2008.

### NOTE:

The RAFT method for navigating transition was developed by David C. Pollock.

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