RETIREMENT POLICY

GENERAL PRINCIPLES

Retirement is a stage of life in secular and religious development. It is presently recognized in the universal Catholic Church, and is in effect on the local level in various dioceses and religious orders.

Retirement for \_\_\_\_\_\_\_\_\_\_\_ does not mean "doing nothing” or being put "on the shelf.” Rather it is the planned and accepted transition from a full-time work status to accepting the opportunity to manage in a creative and personal way his time and talent in the areas of ministry, prayer and leisure. All this, of course, is to be accomplished within the framework of true \_\_\_\_\_\_\_\_\_\_life.

For the dedicated \_\_\_\_\_\_\_\_\_\_\_, retirement presents a continuing opportunity to serve the community, the Congregation, and the Church. It is also a time when the \_\_\_\_\_\_\_\_\_\_\_ may develop more deeply his personal, psychosocial, and spiritual well-being, recognizing that the measure of his worth is not "what he does" but "who he is." Finally, retirement likewise gives the \_\_\_\_\_\_\_\_\_\_\_ the precious opportunity to prepare himself in a more relaxed atmosphere for death.

RETIREMENT IN GENERAL

There are three things to be considered concerning retirement: preparation for retirement, limited ministry, and full retirement.

1. In order that his limited ministry and retirement years may be good and useful, the religious should prepare himself for those years. Preparation for retirement is an important requirement for a successful retirement.

2. *Limited ministry* is the state in which the \_\_\_\_\_\_\_\_\_\_\_continues in ministry, but with lesser responsibility. It is the state during which he progressively prepares himself in a specific ministry for full retirement.

3. In *full retirement,* the \_\_\_\_\_\_\_\_\_\_\_\_ continues to serve his community, the Congregation, and the Church as he wishes and is able. It is a state arrived at with the permission of the Superiors, and is therefore linked to his personal capabilities and the possible options for a particular community. While enjoying full retirement, the \_\_\_\_\_\_\_\_\_\_\_\_, even though his apostolic role now has a different focus, will strive to draw even closer to God through a more intense spiritual life.

LIMITED MINISTRY

1. Sometimes a confrere will discover that, because of physical or psychological problems, he is no longer able to serve full-time in his assigned ministry. At that time he may request limited ministry status from the Provincial Superior. He should do this ordinarily after consultation with his local Superior, spiritual director, and doctor.

2. When a confrere reaches sixty-five years of age, he may choose limited ministry, regardless of health or capabilities. He should inform his local Superior and the Provincial Superior as soon as he arrives at this decision.

3. If the local community discerns that a confrere should be moved to limited ministry status, the confrere and the community will determine the nature of his limited ministry. The \_\_\_\_\_\_\_\_ will be kept informed in case its entry into the discussion becomes necessary. Medical or psychological resources may be used to facilitate the dialogue.

4. The local Superior, community, and individual confrere determine the degree of participation in all areas of community life and forward this information to the Provincial Superior.

FULL RETIREMENT

Whenever a \_\_\_\_\_\_\_\_\_\_\_, regardless of age, discerns after consultation with his spiritual director, his physician, and/or psychologist, that he is no longer able to serve in the active ministry, he may request full retirement from the Provincial Superior.

When a \_\_\_\_\_\_\_\_\_\_\_\_, reaches seventy years of age, he may choose full retirement, regardless of his state of health or capabilities. Upon reaching seventy years of age, the member who chooses to retire will declare his intention in writing to the Provincial Superior. Although a member may choose to retire, the Provincial Superior may ask the member not to retire because of special needs or circumstances. This request will be reviewed on an annual basis by the member and the Provincial Superior.

If the local community discerns the need for a confrere to take full retirement because of physical or psychological problems, ordinarily the local community will discuss the matter with the individual confrere before the local Superior brings the matter to the attention of the Provincial Superior. The Provincial Superior, after consultation with his Council, along with a competent physician and/or psychologist, will make the final decision in the matter. Recognizing that a confrere sometimes may not be aware of his situation, or may not agree with the community’s discernment, every effort must be made to elicit his full understanding and cooperation. All must be done with the greatest charity and concern for the confrere in question.

The retirement decision and the practical implications of the decision, e.g. living conditions, spiritual growth opportunities, financial arrangements, participation in ministry and other work, continuing education, health care, travel, transportation, recreation, etc., are to be discussed by the Provincial Superior or his delegate, the local Superior, and the individual confrere involved. These practical implications are to be clearly understood and agreed upon by the local and Provincial Superior, the community, and the individual confrere. They are to be documented for all concerned, reviewed when necessary and adapted to new circumstances.

A fully retired confrere is free to accept or decline invitations from his community to help in ministry. Offers of assistance are to be treasured and refusals to help are to be accepted without prejudice.

OTHER SPECIAL CONCERNS

Adequate funds for fully retired confreres will be provided for in the financial budgets of the local communities and of the Province, in the same way in which the Province now provides for sick and elderly confreres. The Province values the past and present contributions of \_\_\_\_\_\_\_\_\_\_\_\_ at this stage of life and will provide reasonable funds for their living expenses and insurance needs.

All limited ministry and fully retired confreres are full members of the Province, and retain their active and passive vote. They also retain a voice in local community matters. Their input regarding ministries should be heard respectfully.

A fully retired confrere may express a preference regarding his assignment to a community. After consultation with the community, the Leadership will make a decision about the request.

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the Provincial Office will:

A. conduct periodic interviews with confreres approaching retirement to become aware of their expectations, attitudes, problems and needs;

B. counsel confreres in their middle years in choosing and preparing for their retirement years and volunteer services;

C. provide information concerning full and limited ministry members to the other Province members in communications;

D. provide reasonable funds for living expenses and insurance costs for confreres in full retirement.

ADDENDUM

Practical details and implementation guidelines are contained in the accompanying addendum, which is under the supervision of the Leadership between Chapters.

HEALTH CARE CENTER

After consultation with the Provincial Superior, a confrere who is in need of special health care will be assigned to \_\_\_\_\_\_Health Care Center community.

Our Health Care Center is one of God's best blessings on the Province. Members of the Province are encouraged to show their care and concern by frequent visits and letters to the confreres residing there. The Provincial Superior and his Council will take care that there is a continued effort to maintain the quality of the medical, spiritual, and recreational care given to these confreres. Confreres at \_\_\_\_\_\_\_\_ are to be constantly informed about the plans and activities of the Province so that they will feel a part of it.

RETIREMENT POLICY ADDENDUM

The Leadership Team will send the following communications regarding retirement to confreres at significant dates corresponding to the initiation of programs established by the federal government:

1. Age 62

\_\_\_\_\_\_\_\_\_\_\_ will issue letters to confreres three months before they reach the age of 62, thanking them for beginning to contribute to the retirement fund with their Social Security income. The letter will include a gentle, very general reminder to begin thinking about preparing for retirement. The Director of Public & Community Affairs will conduct follow-up conversations and provide any assistance requested from the confrere or the Provincial Superior.

2. Age 65 \_\_\_\_\_\_\_\_ will issue letters to confreres three months before they reach the age of 65, when Medicare becomes effective. The letter will remind them to begin thinking about preparing for retirement. A detailed list of available community living options and ministry options will be provided. They will be asked about specific retirement plans and requested to respond. The Director of Public & Community Affairs will conduct follow-up conversations and provide any assistance requested from the confrere or the Provincial Superior to help establish individual retirement plans.

3. Age 70 \_\_\_\_\_\_\_\_\_\_\_ will issue letters to confreres six months before they reach the age of 70, congratulating them on reaching this milestone. A detailed list of available community living options and ministry options will be provided. Confreres will be asked to respond about specific retirement plans and which retirement options interest them. The Director of Public & Community Affairs will conduct follow-up conversations and provide any assistance requested from the confrere or the Provincial Superior to help with the transition into the retirement stage of life.