

Thank you for taking a few minutes to complete this survey.

Please answer these first few questions to ensure you qualify for this survey.

1. Have you ever served in any of the following roles? (Select all that apply)

- Pastor of a church
- Other minister at a church (licensed or ordained)
- Missionary
- None of these (**terminate**)

2. Are you currently retired or mostly retired?

- Yes
- No

3. What is your age?

____ Age

If Q2=no and Q3<67, then terminate

[Terminate Note: Thank you for your willingness to complete this survey. Unfortunately, you do not qualify. We were seeking to reach pastors, ministers, and missionaries of retirement age.]

This survey is designed for pastors, ministers, and missionaries of retirement age. Your honest descriptions of your experiences will be combined with others and shared in aggregate with denominations and ministries so they can better understand the dynamics of retirement from ministry and to provide appropriate support. All your responses are completely **confidential**.

Ask if Q2 is Yes

4. At what age did you retire from ministry?

____ Age you retired

5. Which of the following describes your employment in ministry for most of your years of ministry?

- Full-time position (35+ hours per week)
- Bi-vocational/part-time position (fewer than 35 hours per week)

6. In total, how many years did you serve/have you served in full-time or part-time ministry?

____ Years in active ministry

Ask if Q1_1 or 1_2 is selected

7. In the last church you served as pastor or church staff member, what was your church's average worship attendance on a typical weekend (including all ages from babies to adults but not counting anyone twice)?

____ Average worship attendance

8. What is your marital status?

- Married
- Single, never married
- Divorced/separated
- Widowed

9. The following questions ask you to step back and think about your overall life today, including relationships, spiritual life, finances, and physical health. **Please select one response for each row. Randomize**

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
In most ways, my life is close to my ideal.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The conditions of my life are excellent.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am satisfied with my life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. Which of the following best describe your overall health today? (Select all that apply)

- I am active and healthy
- I have been diagnosed with a mental illness (e.g., depression, dementia, PTSD, Alzheimer’s, etc.)
- My spouse has been diagnosed with a mental illness (e.g., depression, dementia, PTSD, Alzheimer’s, etc.)
(Hide if Q8≠Married)
- I have physical disabilities that limit my ability to get out and interact with others
- My spouse has physical disabilities that limit our ability to get out and interact with others **(Hide if Q8≠Married)**
- I spend a significant amount of my time caring for the health of someone with disabilities
- Other (please specify) _____
- None of these
- Not sure

11. If you had more help with your health or the health of those you care for how much would this improve your overall well-being?

- Would not help at all
- Would help a little
- Would help
- Would help a lot
- Not sure

12. What resources would most help you with your health and the health of anyone you care for? (Select all that apply)

- Financial assistance
- Medicare supplementary insurance
- Encouraging notes
- Inspiring stories of those who faced similar issues
- Information, tips, and best practices for maintaining good health
- Information, tips, and best practices for caregiving
- Information on obtaining good health care
- Other (please specify) _____
- None of these
- Not sure

Ask if Q12 includes any Information or Encouraging response

13. How would you prefer to obtain this type of information, tips, encouragement, or best practices? (Select all that apply)

Randomize

- Printed magazine

- Book
- Email newsletter
- Online video series
- Podcast
- An App
- None of these
- Not sure

14. Do you meet at least once a month and openly share your struggles with any of the following? (Select all that apply)

Randomize

- A counselor
- A close friend
- Your spouse (**Hide if Q8=Married**)
- A Bible study group in your church
- None of these
- Not sure

15. How many close friends do you have today other than family who you see or speak with at least once a month?

_____ #

16. Do you get together at least once a month with others outside your family to do any of these things? (Select all that apply) **Randomize**

- Hobbies (e.g., quilting, woodworking, etc.)
- Recreation (e.g., walking, fishing, tennis, etc.)
- Watching movies or sports
- Visual or performing arts
- Going out to eat
- Service projects
- None of these
- Not sure

17. Which of the following describes where you live today?

- I lived in this area prior to being retirement age
- I had not lived in this area prior to being retirement age

18. Which of the following describes where you live today?

- I live near most of my friends
- I live near my child(ren)
- Neither

19. If you had more help connecting with new friends how much would this improve your overall well-being?

- Would not help at all
- Would help a little
- Would help
- Would help a lot
- Not sure

20. What resources would most help you with your relationships today? (Select all that apply)

I need help...

- Improving my relationship with my spouse (**Hide if Q8≠Married**)
- Improving my relationship with my children
- Improving my relationship with my grandchildren
- Making friends who have had similar experience in ministry
- Making friends who have had similar experience in leadership
- Making friends who live near me
- Relating to a church in which I am not in leadership
- Learning how to connect with people in this season of life
- Hearing inspiring stories of those who faced similar issues
- Other (please specify) _____
- None of these
- Not sure

Ask if Q20≠None

21. How would you prefer to obtain this type of relationship help? (Select all that apply) **Randomize**

- Counseling
- Events to help connect me with people
- An online community of people like me
- Printed magazine
- Book
- Email newsletter
- Online videos
- Podcast
- An App
- Gathering in my local church
- None of these
- Not sure

22. Which of the following describe your feelings toward the churches or mission field where you served in ministry?
(Select all that apply) **Randomize**

I feel...

- Thankful
- Love
- Rewarded
- Encouraged
- Proud of them
- Bitter
- Disappointed
- Betrayed
- Connected
- Disconnected
- None of these
- Not sure

23. Looking back on your ministry efforts before retirement, how satisfied are you with those efforts?

- Very satisfied

- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Not sure

24. What I desire most from retirement is...(Select one)

- Doing ministry without needing to be paid
- Resting and having fun
- Enjoying the people whom I care most about
- Working as long as I can
- Not sure

Reminder: This survey is completely confidential.

25. Overall, how confident are you that you (and your spouse) will have enough money to live comfortably throughout your retirement years?

- Very confident
- Somewhat confident
- Not too confident
- Not at all confident
- I'm not sure

26. What is your household's current annual income (includes money you withdraw from retirement savings, Social Security income, wages, etc.)?

- Less than \$20,000 per year
- \$20,000 - \$39,999 per year
- \$40,000 - \$59,999 per year
- \$60,000 - \$79,999 per year
- \$80,000 - \$99,999 per year
- \$100,000 or more per year
- Not sure
- Prefer not to answer

27. Which of the following types of debt do you (and/or your spouse) currently have? (Select all that apply) **Randomize**

- Credit Card Debt
- Educational Debt
- Mortgage -- if selected, how many years are left on the mortgage? Years _____
- Car Loan(s)
- Loan(s) from retirement account(s)
- Other loan or credit
- No loans or debt
- Prefer not to answer

Ask if Q27 ≠ No loans or debt

28. Not including a mortgage, approximately how much total debt does your household currently have?

- No debt
- Less than \$10,000

- \$10,000 - \$19,999
- \$20,000 - \$29,999
- \$30,000 - \$39,999
- \$40,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 or more
- Not sure
- Prefer not to answer

29. Which of the following best describes your current housing? (Select one)

- I live in a residence I rent
- I live in a residence I own
- I live in a residence provided by a church or ministry
- I live in an assisted living facility
- I live with family
- None of these

30. Do you have a pension plan with current or former employer that pays you a set monthly amount?

- Yes – approximate monthly amount pension pays \$_____
- No
- Not sure

31. Approximately how much does your household currently have in retirement savings? Include ALL types of retirement savings such as IRAs, 403(b), 401(k).

- None
- Less than \$10,000
- \$10,000 - \$24,999
- \$25,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$249,999
- \$250,000 - \$499,999
- \$500,000 - \$999,999
- \$1,000,000 or more
- Prefer not to answer

Ask if Q31 ≠ none and ≠ prefer not to answer

32. Approximately what percentage of your retirement savings was contributed by each source? (Includes matching funds)

____% I (or my spouse) contributed

____% Gifts or inheritance from others

____% Contributions from churches where you served (**show if Q1_1 or 1_2 is selected**)

____% Contributions from missionary sending organization where you served (**show if Q1_3 is selected**)

____% Contributions from denomination

____% Contributions from other sources (non-ministry employer, etc.)

100% Total

33. Do you (or will you) receive Social Security benefits?

- Yes – approximate monthly amount from Social Security \$_____
- No
- Not sure

34. If you had more help with your finances how much would this improve your overall well-being?

- Would not help at all
- Would help a little
- Would help
- Would help a lot
- Not sure

35. What resources would most help you with your finances today? (Select all that apply) **Randomize**

I need help...

- Finding work suitable for retired ministers/missionaries
- Learning how to stretch my current resources
- Doing taxes
- Managing my retirement funds
- Hearing inspiring stories of those who faced similar issues
- Other (please specify) _____
- None of these
- Not sure

36. Which, if any, of the following resources on managing finances would you prefer? (Select all that apply) **Randomize**

- Consultation with an adviser
- Training events
- Online job board
- Job fair with ministry and non-ministry opportunities
- Printed magazine
- Book
- Email newsletter
- Online video series
- Podcast
- An App
- None of these
- Not sure

Please indicate your level of agreement with each of the following statements.

Ask if Q2 is Yes (retired)

37. I was prepared for the adjustment from ministry to retirement.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

38. I have continued to make new friends in recent years.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

Ask if Q2 is Yes (retired)

39. The transition from ministry to retirement was easy.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

40. I often feel lonely or isolated.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

41. At my current church I have many close relationships.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure
6. I am not currently part of a local church

Ask if Q2 is Yes (retired)

42. I feel like I lack purpose now that I am retired from ministry.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

Ask if Q2 is Yes (retired)

43. I struggled adjusting to being retired.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

Ask if Q2 is Yes (retired)

44. I have had to rethink my sense of value and worth since I have retired from ministry.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

45. I am often concerned about the financial security of my family.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure
6. Not applicable

46. My physical needs or those of my spouse have caused significant financial strain.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

Ask if Q2 is Yes (retired)

47. Retirement forced me to think about my value to God.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure

Ask if Q2 is Yes (retired) And Q8 is married/widowed/divorced

48. My spouse had difficulty adjusting to me being retired.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree
5. Not sure
6. No spouse at that time

Ask if Q8 is married

49. My spouse is very satisfied with our marriage.

1. Strongly agree
2. Somewhat agree
3. Somewhat disagree
4. Strongly disagree

5. Not sure

50. How, if at all, did you/have you prepared for the transition to retirement? (**Select all that apply**) **Randomize**

- Read articles on the topic
- Spoke with others who had retired
- Attended a retreat or conference for those nearing retirement from ministry
- Watched videos on the topic
- Other (please specify) _____
- Did not prepare
- Not sure

51. If the following resources were available today, which would you be interested in using? (Select all that apply)

Randomize

- A website connecting retired ministers and missionaries with trusted companies, ministries, and experts that have helpful resources
- Local events to help connect with others who have similar ministry backgrounds
- Bible studies that address issues retired ministers and missionaries face
- An online community of ministry retirement experts that discuss and respond to questions
- Access to counseling that was conducted using Facetime or web-conferencing
- None of these
- Not sure

52. What advice do you have for current pastors, ministers, and missionaries who are about to transition into retirement?

Open end response box

53. How could ministries best help those who are retired from full-time ministry?

Open end response box

54. Where do you currently live?

- Northeast (CT, MA, ME, NH, NJ, NY, PA, RI, VT)
- Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)
- South (AL, AR, DE, DC, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX VA, WV)
- West (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)
- Outside the United States

55. Which of the following best represents your ethnic background? (answer not required)

1. American Indian or Alaska Native
2. Asian or Pacific Islander
3. Black or African-American
4. Hispanic or Latino
5. White
6. Other
7. Prefer not to answer

56. What is your gender?

1. Male
2. Female

57. With which of the following denomination(s) or faith group(s) did you directly serve in ministry or identify most with during your ministry?

- | | |
|--|--|
| <input type="checkbox"/> Assemblies of God | <input type="checkbox"/> Methodist |
| <input type="checkbox"/> Baptist Missionary Association of America | <input type="checkbox"/> Nazarene |
| <input type="checkbox"/> Baptist-- Other | <input type="checkbox"/> Non-denominational / independent / Bible church |
| <input type="checkbox"/> Church of the Brethren | <input type="checkbox"/> Pentecostal / charismatic / Full Gospel |
| <input type="checkbox"/> Church of God Cleveland | <input type="checkbox"/> Presbyterian Church in America |
| <input type="checkbox"/> Converge | <input type="checkbox"/> Wesleyan |
| <input type="checkbox"/> Lutheran-- LCMS | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Lutheran-- ELCA | |

Ask if Q1=Missionary

58. With which mission did you directly serve as a missionary? (Select all that apply)

- Through my denomination
- OM
- OMF
- OMS
- Pioneers
- SEND International
- WEC
- Wycliffe
- Other (please specify) _____

Display if Incentive count <1000

59. As a thank you for your time, we would like to email you a \$5 e-gift card to Amazon.com *This email will not be used for any other purposes.*

Email address for us to send the e-gift card: _____

60. Would you be willing to receive email invitations to future surveys? *You will not be added to any marketing lists. It will only be used for occasional survey invitations.*

- No
- Yes, Email address: _____