

Part One

*The Principles,
Cost, and Players in
Health-Based Transition*

Chapter One

Principles of Transition, Jesus Style

And this is my prayer: that your love may abound
more and more in knowledge and depth of
insight. . . .

—*Philippians 1:9 (NIV)*

We do not say it frequently in this book, but it is important to state emphatically that the personal and corporate spiritual work required in a successful pastoral transition is critical. It would be a mistake to interpret the organizational and managerial tone of this book as dismissive of that spiritual work. Linda Karlovec, a psychologist who specializes in organizational therapy, argues that almost all resistance to organizational change is emotional, *though it is perceived to be rational*. This implies that the entire pastoral-transition enterprise needs to include the spiritual components of prayer, Scripture reading, personal reflection, confession, and nurture of faith. The life, teaching, and prayers of Jesus constitute a particularly rich source of sustenance for this journey.

Transformation is not a function of information, but of exploration with trust. People must find enough strength in their relationship with God and their trust of one another to be able to talk openly, pray, confess, and seek grace and healing if they are to develop excellence in a leadership transition. The capacity of a leader, or a group of leaders, to face their own shadow side through the power of Jesus Christ is critical to effectiveness in succession planning.

It is difficult to imagine a man more insistent and articulate regarding His own leadership transitions than Jesus of Nazareth, as described in the record of the New Testament. At the beginning of His ministry, He is clear and unambiguous. In Luke 4:16 (NIV), He enters the synagogue in His home town, reads a passage from the prophet Isaiah, and unmistakably lays His hand to the reins of leadership: "Today these words are fulfilled in your hearing." At the end of His ministry, He is equally clear and unambiguous; in John 16:16 (NIV) Jesus says, "A little while and you will see me no more." Later, we delve into the spiritual principles that seemed to be guiding Jesus. For now, suffice it to say that Jesus was candid and forthright about His arrival on the scene and equally transparent regarding His departure. Although the people on both ends tried to deny this reality, Jesus was unrelenting in His focus.

In the church today, the situation is often reversed. Members try to face the reality of a leadership change, while the leader denies it. Members know that they are the ones who will be left to deal with the shock wave of a sudden departure, and all the aftershocks as well. But when they try to talk honestly about this, the leader often dismisses the concern with an ambiguous response concerning God's will, God's call, and God's timing. Leaders who design worship services with an impulse of excellence driving every detail are willing to leave the impact of a major leadership transition to a curious silence. When it comes to pastoral transition, leaders often stop leading.

Why? The reasons certainly cannot be traced to the behavior or the teaching of Jesus. Instead of being grounded in spiritual principle, the reasons for silence seem to be rooted more in fear and low self-confidence. We are afraid that:

- If we talk about pastoral transition we might put the idea in someone's head and make it more likely to happen.
- We will create a lame duck situation in which effective ministry becomes impossible.

- A discussion about pastoral transition will have unintended consequences that we do not know how to manage.
- We don't have the resources to deal with transition planning and be successful.
- Our peers and colleagues won't support us in doing it a different way, and we are not sure we want to be pioneers on the road of better pastoral transition if this means going it alone.

All these issues can be addressed given the right resources and spiritual resolve. At the present time, however, church culture in North America does not provide these resources. The end result is that the congregation is left with no alternative but to experience the triple whammy of emotional, "organic," and organizational change all at the same time. As a whole, the church is a living, breathing organism and experiences all of the same emotions as an individual. At the same time, it is also an institution that experiences change at an organizational level as well. Thus, the triple whammy.

Jesus Did It Differently

Choose a number between one and twenty. There are that many reasons why the church must manage leadership transitions in a different way. But the most compelling reason is as simple as it is basic: Jesus did it differently. It is fundamentally an issue of discipleship. How can we claim to be following Jesus, when our practice of managing leadership transition runs directly counter to the model of His life?

Unfortunately, the people who genuinely sound like Jesus on this issue are not in the church, but in business. During his last years of service, the CEO of a large corporation said that putting in place a succession plan was what he spent most of his time thinking about. In an important work on succession planning, one author argued that a good plan is needed to avoid undermining the entire transition process and creating lingering casualties. How many church leaders understand that the failure to manage their transition to another ministry with clarity and wisdom creates

lingering casualties among the members they have worked so hard to cultivate? One of the long-term needs that human beings have is to leave a legacy. It is small comfort for a pastor to look back over a lifetime of service and see three or four seasons of dynamic ministry punctuated by decline and retrenchment after his or her departure because inadequate attention was given to a transition plan. Jesus' transition plan for His own disciples included a vision for long-term results: "You did not choose me, but I chose you and appointed you to go and bear fruit—fruit that will last" (John 15:16 NIV).

Jesus managed two major leadership transitions in His life. He managed His succession of His predecessor, and He managed His own departure. Today's leader has to manage these same transitions as well. But the impetus to do so requires understanding *management as an expression of discipleship*. The example of Jesus is rich and illuminating. We cannot derive specific transition strategies that would fit the multiplicity of church governments today, but certain *start-up principles* emerge that apply across the spectrum of churches.

Principle One: Honor Thy Predecessor

Practically, honoring our predecessor means we should use TLC with members regarding a predecessor. That's *talk*, *listen*, and *confirm*.

Leaders help the transition process if they simply *talk* about their predecessor. Jesus did. He talked about John the Baptist on multiple occasions in public settings. Here is a list of some things Jesus said about His predecessor in public:

Among those born of women, there has not arisen anyone greater than John . . . (Matthew 11:11 NIV)

For John came to show you the way of righteousness . . . (Matthew 21:32 NIV)

For John came neither eating bread nor drinking wine, and you say, he has a demon. (Luke 7:33 NIV)

The baptism of John—was it from heaven or from men? (Mark 11:30 NIV)

Jesus was not afraid to talk about His predecessor *in public*. Yet many church members experience an eerie silence on the part of their new pastor regarding the work of his or her predecessor. It would be refreshing and liberating for many members to hear their pastor speak, in positive terms, the name of the pastor who went before and was referred to as an instrument in God's plan for building that church. In reality, the opposite is often the case. A pastor is sometimes so threatened by the esteem paid to a predecessor that he or she gives the signal to members that they are not to speak about the predecessor in the pastor's presence.

This leads to *listening*. Members need leaders to listen to them talk about their affection for their predecessor. This enables them to integrate their past and present experiences rather than compartmentalize them. If the leader is unwilling to do this, it places an emotional burden on the members. In one church, members made an agreement with one another not to speak the name of a former pastor except in private for nearly twenty years after the pastor left the community and moved to another state!

Ken Blanchard, of *One Minute Manager* fame, said that "what we resist, persists." The surest way to botch a leadership transition and lock people into the past is to send the message that they cannot talk about the previous leader. Again, in Blanchard's words, this is an obstacle posed by the ego—and ego means Edging God Out.

An example that pastors could learn from comes from a choir director in a large church who described how her ministry began. When Leta realized she was following a popular and effective predecessor named Martha, she called her on the phone. This began regular communication. Whenever she had a conversation with Martha, Leta would share with the choir that she had talked with Martha and would convey Martha's greeting to the choir. When Martha came to town, Leta would invite her to sing in the choir. When Leta was visiting in another city where Martha was the choir director, Leta was introduced to the congregation and invited to direct the choir.

As a result, members of the church were at ease with their past leader and their present one. They did not have to be anxious that conversation about their past leader would create a conflict with their new one, or vice versa. They were not placed in a position of making choices regarding loyalty. This was extremely effective as a transition strategy. Leta described this experience as uncommon among choir directors; however, it seems to follow the model of Jesus.

Finally, members need to have the leader *confirm* the importance of the past. As we develop, we generally are trying to find integrity in our lives. It is important to discover that a common thread has been running through our years, and that life is not merely a series of events that have no relationship to one another. Members and leaders need to confirm that past experiences, including those with a predecessor, made an important contribution to the drama of their lives even when a significant change has to be made. Taken together, talking, listening, and confirming help fulfill the spiritual principle introduced by Jesus: Honor thy predecessor.

Principle Two: Build on Health

Jesus said, “Therefore every teacher of the law who has been instructed about the kingdom of heaven is like the owner of a house who brings out of his storeroom new treasures as well as old” (Matthew 13:52 NIV).

Jesus reached into the treasure chest of the past and pulled out what was healthy and strong, thus fashioning the timbers of the new work He was building. Many of the stories Jesus told were not original to Him; neither were many of His ideas. Jesus knew where to find islands of health in His tradition, and that is where He planted His feet.

Jesus knew that the history of His people held pockets of disease and dysfunction. What we now call the Old Testament spoke of polygamy and concubines. Some Scripture seemed to permit a

system of divorce that left women impoverished. Jesus did not allow Himself to get lost in an ocean of dysfunctional thinking and debate from the past. He went straight to the Scriptures that spoke about health in marriage—that a man should leave his father and mother, cleave unto his wife, and the two become one. Knowing that some Old Testament laws were less helpful than others, Jesus zeroed in on the greatest commandment, the one most visionary and grounded in health: “Love the Lord your God with all your heart, soul, strength, and mind” (Deuteronomy 6:5 NIV).

Today, one prevailing stream of thinking about leadership transitions tends to be *illness-based*. A pastoral departure is treated like a terminal diagnosis; just as no one plans for cancer, no one plans for a leadership transition either. Once the leader has moved, grief sets in. Organic change has taken place. A death has taken place. The congregation is wounded in all the ways an individual is wounded by a personal loss, and it responds in a similar pattern. Denial, anger, depression, guilt, bargaining, and finally acceptance are the stages of grief played out in the congregation as the members experience loss. An entire body of literature has grown up around this illness-based approach to leadership transition.

At the same time, the grieving congregation also experiences organizational change, which is the inevitable companion to leadership change. It is in the process of moving from something to something. At first, the congregation externally experiences denial, then moves it internally to resistance, and then on to exploration of what these changes will be and how they affect the individuals involved. Finally, external commitment completes the cycle. Some people move through the steps of organic or emotional change and organizational change rather quickly; for others it is so painful they never completely recover. Unfortunately, some congregations are allowed (sometimes encouraged) to focus on their wounds and weaknesses rather than the islands of health that could be a source of strength and renewal. Further discussion about health-based transition in contrast to illness-based transition can be found in Chapter Three.

It is sad to admit that many consultants, interim pastors, and denominational agencies have a vested interest in the illness-based model of leader transition. Reinforcing the weaknesses of a congregation and focusing on wounds makes the congregation more dependent on the “healer.” Sometimes, it creates an opportunity to chasten a maverick congregation, bring it back into the fold, and make the members “healthy” again. It is also a way to excuse poor performance just as we excuse sick people from having to go to work. The question Jesus put to the man by the pool is often relevant to a church in transition that is illness-focused: “Do you want to get well?” (John 5:6 NIV).

Considerable pressure is often brought to bear on a new leader to fix what is broken. Get inactive members to come back. Restore the women’s association to its former strength. Visit unhappy members. Listen to stories about problems with the former leader. Yes, tend to wounds, but don’t focus entirely on grief. Focusing on these pockets of dysfunction is a poor transitional strategy. Jesus knew that. Build on health.

Principle Three: Complete the Past

Jesus was a master at completing the past. The past was neither His whipping post nor His prison. The past was the first stage of a two-stage rocket headed upward.

Jesus understood John the Baptist’s role as preparatory to His work; there was no arrogance here relative to John. Jesus understood His own work as preparatory to that of His disciples; He understood the past as the forerunner of the present. Just as the tree carries its history in its rings, the present carries the past and gives it a new surface. Jesus indicated that He did not come to abolish the law, but to fulfill it. Every student of the Bible knows that when Jesus speaks about fulfilling the Old Testament, He does not mean “make it come true.” When Jesus fulfills the Old Testament, He completes it by giving it new meaning. Through Jesus, we understand that the complete and

full meaning of a promised land is not a piece of geography, but an eternal life.

The default succession plan for kings in the Old Testament is frequently assassination. “Zimri came in, struck him down and killed him in the twenty-seventh year of Asa, king of Judah. Then he succeeded him as king. As soon as he began to reign and was seated on the throne, he killed off Baasha’s whole family. He did not spare a single male, whether relative or friend. So Zimri destroyed the whole family of Baasha . . .” (I Kings 16:10–12 NIV).

Another example: “As soon as Baasha began to reign, he killed Jeroboam’s whole family. He did not leave Jeroboam anyone that breathed, but destroyed them all . . .” (I Kings 15:29 NIV).

Not only was the previous king killed, but the fruit of that king’s life—children and accomplishments—was also destroyed. This is one approach to the past: try to obliterate it. Here, we must reflect soberly. The operation of the human ego in pastors can work against a healthy pastoral transition. The ego does not want to “adopt” the effective ministries that were the “children” of the previous pastor; it wants to have its own children. There is nothing wrong with the drive to be a creative presence in the congregation one is serving, to go beyond repeating the past. It is best to think of a pastoral transition as a blended family in which former effective ministries are adopted by the new pastor while new ministries are birthed as well.

Jesus did not deal with the past by assassination, but by completion. He generally assumed that the past was the necessary path to the present. The role of the new leader is to discover how he or she can complete the work of a previous leader or take it to a higher level.

Many older pastors have a tradition of superb pastoral care and visitation. Upon their retirement, it is likely that the new pastor is younger and has a philosophy of pastoral care espousing more lay involvement and equipping. The tendency is for the pastor to engage certain members of the church in a debate about whether a pastor should be doing all the pastoral care or

not. This creates a win-lose situation relative to the past. However, it is possible to see the excellent pastoral care provided by the previous pastor as the necessary stage in developing a more widely shared (and often more effective) member care ministry. This approach sees the work of the previous pastor as setting the standard for excellence to be followed by a capacity building and maturing within the congregation that meets those high standards and expands the ministry to more people. Under the creative impetus of the Holy Spirit, it is always possible to frame one's work as completing the good work of another. That's what Jesus did.

So we see three Biblical principles from the life of Jesus relating to start-up for a new leader: honor thy predecessor, build on health, and complete the past. These are not merely advisory steps for the new leader to consider. They are three principles that church leaders and boards should build into a transition plan as an act of obedience to the Gospel. Any church seeking excellence in a leader transition should use these criteria to screen new leaders, train new leaders, and plan how the transition will be designed and implemented.

Three years later in the life of Jesus, He has a different set of transition issues. He must manage His departure and the succession plan that ensures the continuation of His work. Again, we do not find a detailed succession plan that fits the great variety of church polities, but there are *important wind-down principles*.

Principle Four: Envision Abundance

Jesus refuses to envision scarcity upon His departure. He refuses to envision stagnation in the future of His disciples: "I tell you the truth, anyone who has faith in me will do what I have been doing. He will do even greater things than these, because I am going to the Father" (John 14:12 NIV). The task of forming and articulating a positive vision for the future does not end with a pension for the leader. A leader following Jesus is called to artic-

ulate a vision for how the Body can thrive in and through a leadership transition. Anything less is a failure of discipleship.

Faith begins with imagination. The first step toward faith that the mountain will be moved is the capacity to imagine the mountain moving. The leader must be able to imagine a way to unfold a leadership transition that increases maturity, deepens capacity, and fosters abundance rather than scarcity. However, imagination is not enough. God's people may perish for a lack of vision, but they grow cynical when a vision has no substance. As Ron Rand put it, "Works without faith is a body without a spirit. That's a corpse. But faith without works is a spirit without a body. That's a ghost."

The closer Jesus moved to His transition out of leadership, the more detailed He became about what would happen next. He gave clear direction: go into the village. Find a man. Bring his donkey. Go into the village. Find a man. He has an upper room. Prepare a meal. Meet me in Galilee. Wait in Jerusalem. A leader who envisions abundance for the future had better have a specific plan in mind for how the vision will be realized. Every strategic plan should have a strategic target that lays out a transition strategy. The transition plan should have a clear set of actions, with accountability, time lines, and a budget. Envision abundance.

Principle Five: Create Capacity

When a leader moves on, a hole is left in the operation. The hole has two components. The first consists of those irreplaceable qualities that are unique to the leader and impossible to replicate. The second consists of transferable skills that were not transferred. Jesus as Messiah was unique and irreplaceable. Jesus as mentor, teacher, preacher, and healer was replicable. The process of moving expertise from leader to people is called creating capacity, or *reproducible ministry*.

Jesus began managing His exit transition on the day, and in the way in which, He called His disciples. In Mark 3:14 (NIV), the text says that Jesus appointed twelve. Actually, the word

appointed in the Greek means “to create.” From the beginning, Jesus was creating capacity in the lives of those He called so that they could replicate His work. Notice also that Jesus used the Hebrew method of education, which was not to lecture but to show. Jesus called the disciples to be with Him. He did not call them to attend “fishers of men” classes. He called them to become fishers of men by “talking with them when you sit at home and when you walk along the road, when you lie down and when you get up” (Deuteronomy 6:7 NIV).

Our experience with pastors is that they are comfortable creating capacity at the operational level. Having an office staff with well-managed volunteers and an able volunteer coordinator who never comes in with a problem is a pastor’s dream. Having a children’s education program that never needs the pastor’s help recruiting teachers is utopia. But many pastors are not comfortable creating capacity at the leadership level. They find it threatening to reproduce or transfer what they know to other leaders, or to use the gifts of others that are executive in nature. The reality that many pastors may not want to face is that several of their church members probably have the gifts to lead the church *administratively* as well as or better than they do. Pastors may let laypeople sit in Congress (the boardroom), but they don’t necessarily want them in the White House (the senior staff meeting).

A congregation planning for transition needs to build capacity at the leadership level. It needs strategic thinkers and planners. It needs marketing and communication experts. It needs people with skills in personnel recruitment, management, and coaching. It needs people who understand fundraising and financial management. It needs psychologists and counselors who can help high-level people work together in periods of stress without getting entangled in personal issues and baggage. It needs professional artists who can paint and sculpt and sing people into new places. All these people need to be spiritually grounded.

Unfortunately, these are often some of the most underused people in the church. If they were honest, many leaders would

admit being afraid to let people with these gifts too close to the reins of power, because they are threatened by such competence. At the same time, some of the most highly skilled laypeople in the workplace become less than adequate in the church because they have not been empowered to use their gifts to the maximum. As a result, a church that is rich in operational capacity has almost no bench strength at the leadership level. When a key leader departs, the church can't field a team. It is important at every level, but especially at the leadership level. Build capacity.

Principle Six: Fight the Demons

By “fight the demons,” we are not speaking about exorcism. We are speaking about managing the shadow side of our lives, which tends to emerge with particular strength during times of transition. All in all, we do not see many struggles in the life of Jesus, except around His transitions in and out of leadership. At the beginning, the transition from being a carpenter to an itinerate preacher and healer drives Him into the wilderness. At the end, the transition out of leadership and to the cross drives Him to Gethsemane. There are demons appearing at these points of transition that threaten to scuttle the future.

It is not necessary to go into a lengthy analysis of the spiritual struggles that emerge during a time of significant change. The issues tend to focus on matters of personal identity, worth, and place. Others have dealt with these issues in depth; you should make use of the fine resources readily available.

However, it is important to make the point that struggle around leader transition is almost all emotional and/or spiritual. We are afraid of the topic and therefore do not talk about it. We do not talk about it, and therefore we are afraid of it. The fact that we avoid such issues, make discussion of them taboo, reward silence, punish honesty, and put systems in place that perpetuate dysfunction is a spiritual issue.

Leaders on both sides of the board table must face the unhealthy part of themselves that threatens a successful pastoral transition. Again, secular business may be ahead of the church on this issue. Management texts are now appearing that urge leaders to become aware of their shadow side and make that side visible to others they are leading. Although we would like to assume that a strong Christian commitment obviates a shadow side to the Christian leader, all the evidence shows it does not. When we talk with people about a different approach to pastoral transition, they often give a list of reasons why a different approach is not viable—nearly all of which are emotional rather than theological or practical. On the pastoral side, they include the need to be indispensable and irreplaceable, the need to be totally unique and original, and the need to be in control. On the lay leadership side, demons may appear as the need to be dependent and escape responsibility, or the need to stay in a relatively small personal comfort zone. Conversely, some lay leaders have a need to be in control, to know everything about everything and maneuver themselves into a position of power, filling a vacuum left by a pastor. All of these are emotional and spiritual issues.

There is a final element that belongs here. We call it *recognizing, acknowledging, and containing dysfunction*. Every organization has dysfunctional elements; they tend to emerge as a strong leader begins to recede. We find this happening in the succession work of Jesus. It is at the point of his departure that Judas betrays Him and Peter denies Him. Rather than seeing this as an odd set of events unique to the Son of God, we should see this as the expected emergence of the dysfunctional side of an organization at a time of leadership transition.

We find a further example of this in the early Church. Listen to the words of Paul as he prepares to leave the church at Ephesus in the hands of local leaders: "I know that after I leave, savage wolves will come in among you and will not spare the flock . . . so be on your guard!" (Acts 20:29, 31 NIV). In a healthy

church, the leader holds back the emergence of dysfunction by his or her mere presence. This is a ministry invisible to all but a very few. When the leader departs, these elements tend to emerge.

A health-based approach to pastoral transition does not deny the dysfunctional elements present in the organization. However, it refuses to focus its energy on fixing those elements as its primary transition function. It is important for the leader to have some thoughtful strategy for containing this dysfunction. The spiritual work of staying centered and focused while holding off negative forces that threaten to harm the church requires faith, humility, and wisdom. There are both spiritual dimensions and process dimensions of this task. To deal with them effectively, we need to fight the demons in ourselves (not in others) and establish good processes that do not allow dysfunctional elements to undermine what is healthy. As churches follow Jesus in the transition process, each has its own wilderness and Gethsemane. But there comes the promise that each will also have its own “return in the power of the Spirit” and “resurrection into new life.”

These transitional principles should be woven into the leadership culture of a church. Since all cultural changes begin with senior leadership, the sea change we are describing must begin with the teaching, coaching, and modeling of the senior pastor. But these principles should be observed for any staff transition—music director, youth leader, program director, education director, administrative staff. The starting point is the interview process, when questions should be posed to the candidate related to his or her history of starting up and winding down in previous positions, plans for managing the transition in and out of the position applied for, and the person’s level of openness to transition training.

The checklist in Exhibit 1.1 helps you measure your ability to work through times of transition.

Exhibit 1.1.

Pastoral Transition Principles

Start-Up Principles

When reflecting on my start up, members would say that:

- ☐ I spoke the name of my predecessor to members of the church in a way that was natural and comfortable.
- ☐ I listened to members talk positively about the contributions of my predecessor, without appearing threatened.
- ☐ I confirmed to them the importance of what my predecessor had contributed to the church.
- ☐ I focused on what was healthy and strong from the church's past.
- ☐ I built upon ministries from the church's past that were solid, and I took them to a new level.

Wind-Down Principles

When reflecting on my wind-down, members would say that:

- ☐ I have given the church a vision of strength and abundance beyond my tenure as pastor.
- ☐ I have brought leadership to the church in developing a pastoral transition plan.
- ☐ I have worked to create capacity in the church that will help carry people through the pastoral transition.
- ☐ I have taught and coached wind-down principles with my staff.

Managing the Shadows

When reflecting on managing the shadows, members would say that:

- ☐ I am aware of my shadow side and how it would sabotage a good transition process.
 - ☐ I have shared my transitional shadows appropriately with other staff members and lay leaders.
 - ☐ I have taught and coached lay leaders to deal with their transitional shadows.
 - ☐ I have taught and coached my staff to deal with their transitional shadows.
-