

Transition Planning

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By Paul Beasley-Murray

Chair of Ministry Today and Senior Minister of Central Baptist Church, Chelmsford

The time comes for all of us when we have to stand down from our post. What then happens to the church? Do we just 'leave them to it', or do we actively engage in planning the process of transition? The traditional position is the former. When I left my first (and only other) church in Altrincham, I took no part in the discussions concerning future ministry - my only contribution was to recommend the appointment of an outside 'moderator'.

Although I gave my church in Altrincham more than the required three months' notice, the process of finding a new minister did not really begin until I had left. The church then entered into a period of 'interregnum'. The term 'interregnum' is an unfortunate expression - it implies that the king has departed. The truth is that the King never leaves!

In the past I have been an advocate of a 'pastoral vacancy'. As Tony Bradley argues in his booklet *Understanding the Interregnum*, it provides a "window of opportunity... for assessing what sort of team we are and what sort of leader we need next".^[1]

An 'interregnum' or 'pastoral vacancy' can prove to be 'a significant interval' for a church.^[2] The significance of this interval has been well expressed by a denominational officer addressing a 'vacant' congregation:

"This could be a most significant time for your congregation. It is a time when you can review the past with its symbols and images of identity and purpose as well as its losses and disappointments. You can allow yourself time to feel those losses and the elements of leadership that are sure to follow along an effective ministry. You can also begin to value the strength and gifts of people in the congregation who step up now to offer leadership, knowing that, with the loss of a significant leader, others will be called upon to provide wisdom and guidance. You can begin to glimpse new opportunities made possible because of the fact that your pastor has left. Above all, as a congregation, you can take responsibility for identifying new directions for your church's ministry, a new vision for your church's mission and a 'grassroots' definition of the church's purpose. This is and has always been your church. Your former pastor believed that and sought to serve your mutual understandings. If the new pastor is to do the same, it will be necessary for you as a congregation to clarify your own church's mission" ^[3]

In the past, I have been an advocate of 'interregna', not least on the ground that churches need time to 'grieve' their former pastor. I have argued that the relationship between pastor and people is in some ways similar to a marriage relationship - and just as, after the death of a partner, a hasty re-marriage is inadvisable, so too is a

hasty calling of a new pastor. Indeed, I have said that, as a 'rule of thumb', the interregnum should be at least as many months long as the years of the former pastor.

Had that 'rule' been followed when I came to Chelmsford, the interregnum would have been 26 months. As it was, there was an interregnum of nine months. I found to my discomfort that for some that period was too short a time - they were still grieving their much loved former pastor and were not ready for new leadership.

Where there is an interregnum, there is rarely a 'hand-over' from one minister to another. Instead, a senior lay representative (in Baptist parlance the church secretary or senior deacon, in Anglicanism the church warden) normally acts as the 'bridge' between the ministries. It just is not 'done' for the former minister to pass on pastoral confidences to the incoming minister. Certainly this was the case at Altrincham: my successor refused an offer of a meeting - he also banned me from coming back to preach at a church anniversary! As a result, we never met one another. The situation was very different when I came to my present church in Chelmsford. Caroline and I went and had tea with my predecessor and his wife, and at my request my predecessor prayed for me at my induction to the pastorate. Even so, there was little content to the hand-over. When I began my ministry in Chelmsford, I began as the 'new broom', and became the initiator of major change.

Now that I am anticipating my own retirement in less than five years' time, I find myself wanting to re-visit the issue of pastoral transition. Indeed, to my surprise several friends have quite independently asked me whether I have considered 'succession planning'.

'Succession planning' is a term derived from business, where it has been a common practice for many years. Increasingly it is also becoming a practice among larger churches in the United States.

The key textbook for pastoral succession is *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions* by Carolyn Weese and J Russell Crabtree.^[4] The underlying premise of this book is that most ministers are in denial:

"It is difficult to imagine a man more insistent and articulate regarding His own leadership transitions than Jesus... 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'...."

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... When it comes to pastoral transition, leaders often stop leading...."

Why? The reasons certainly cannot be traced to the behaviour 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.”*

Weese and Crabtree argue that such denial is not only unfair to the church, it also runs counter to the example of Jesus: “How can we claim to be following Jesus, when our practice of managing leadership transition runs directly counter to the model of his life” [\[5\]](#)

In a subsequent internet article, *Loving them to the End: How a Pastor Begins Thinking about Pastoral Succession Planning*, [\[6\]](#) Crabtree writes:

“Pastoral succession planning is a process that develops a plan for replacing the current pastor and begins to implement that plan prior to the current pastor’s departure. The purpose of pastoral succession planning is to enable a church to move forward into the next phase of its external mission and internal development with a new leader appropriate to those development tasks with a minimum of spiritual, programmatic, material, and people losses during the transition. This takes seriously the call of Jesus to not only ‘bear fruit’, but to ‘bear fruit that will last’ (John 15.6). In the current environment where church leaders often resist succession planning, a transitional ‘rot’ sets in that seriously jeopardizes years of faithful and fruitful ministry’.

Crabtree goes on:

“Work with your leaders to develop a compelling, Biblically--based vision for the succession process... This does not need to be (and should not be) detailed. It should be a high-level snapshot of what the transition to a new leader will look like, what people will be doing, what they will be saying, how they will be thinking, feeling.. and praying”.

Crabtree recommends that the succession planning should begin within two years of an anticipated transition. He also recommends the appointment of a “transition consultant who can provide guidance to them [the leaders] at a time when you will

need to begin to practice a 'disciplined absence'"

As far as I am aware, nothing has been published in the UK on 'succession' or 'transition' planning. However, Paul Harcourt, Vicar of All Saints, Woodford Wells, has kindly given me a copy of material he has devised for workshops on 'Succession planning in larger churches', which is to a large extent based on *The Elephant in the Boardroom*. There he writes:

"Jesus instituted a training programme for the continuation of the ministry (the 12, the 72, the wider church and those to come). Therefore, clearly transition planning is a discipleship issue! If you love the church, you should do what Jesus did and make provision for leadership once you are gone"

Harcourt goes on to argue that transition planning is particularly important in the larger church. "Larger churches are different from other churches; they are often founded on longer ministries; and often involve very gifted administrators, intuitive strategists, who are hard to replace; and their PCC search committees have very little experience in making appointments".

So where does all this leave me? I have become convinced that, for the sake of the ongoing well-being of my church, I need to encourage my church to engage in transition planning before I terminate my ministry here. Let me make it clear: I do not believe it to be right for me to engage in 'succession' planning - it is for the church to choose my successor; I do believe it is right to lead my church into 'transition' planning.

If I were to work right up to the age of 70, for which the church has already given its blessing, and leave in March 2014, then I would have served 21 years here in Chelmsford - the thought of a 21 month interregnum (one month for every year of ministry) horrifies me. In my judgement, the church will need another pastor within four months of the ending of my ministry. The fact is that our busy, seven-day-a-week church has become a very complex organism - it needs full-time leadership. A lengthy interregnum would almost certainly lead to decline.

As I reflect upon my situation, I think that what I need to do in the first place is to have an exploratory conversation with my leaders (in Baptist terms, my 'deacons') to establish a time-table. Ed Bratcher, in an article entitled *Preparing for Retirement*, tells of how he officially announced his retirement seven months in advance, but informed his board of deacons five months prior to that: "I found a year's notice to the church leaders to be about right. The deacons then had time to prepare themselves and the church for my departure. And the seven months notice to the congregation gave my wife, Marjie, and me time to say good-bye yet without dragging it out".^[7]

Without wanting to extend the period of farewells, I feel that one year is not enough. Not only the leaders, but also the church needs to consider the kind of ministry the church will need in the future - this will inevitably take time. Only then can the process of finding a new pastor begin to take place - in our Baptist system the settlement process can often take a year. I therefore am minded to propose that we adopt Crabtree's advice and begin the transition process two years before my departure.

The traditional argument against such a lengthy transition period is that the minister becomes 'a lame duck'. But this need not necessarily be the case. Ed Bratcher, for instance, discovered that, if he didn't act like a lame duck, then he wouldn't be treated as such. Clearly I could not get involved in further long-range planning, but there would be plenty of other ministerial challenges remaining.

The church may decide that one of its present ministerial staff should take over the reins of leadership. However, as Ben Marlowe, who, as an associate minister, took over the leadership from David Beer at Frinton Free Church, noted, this appointment "was first born out of having ascertained that the church really desired to build upon his legacy and to continue in the same direction. Had they wanted to radically change direction, it would not have worked. The 15 month hand-over period that we had after the decision had been formally taken proved to be invaluable".^[8]

Alternatively the church might choose to adopt another form of overlapping ministry by calling someone to be an associate with a view to becoming the senior pastor. Certainly, the experience from some organisations, in both the public and private sector, have demonstrated the benefits of having an overlap of senior managers where one manager is retiring or has given sufficient notice of leaving. These benefits include joint working and familiarisation with the work environment whilst enabling the successor to have a good grounding in the organisation before proposing significant change. The retiring pastor could also find the situation beneficial if such transition planning included an opportunity for the retiring minister to reduce the number of contractual hours worked each week in preparation for formal retirement! Sadly, this arrangement of overlapping ministries has not always worked well in church life - so much depends upon the ministers concerned. As Jim Hamilton commented to me: "There are horror stories of situation were with succession planning in mind, the successor has come into a team situation for a time before the minister leaves with a view to smooth transition and the opposite happens because criticism, insecurity, jealousy and a hundred and one problems surface, and either the present minister leaves under a cloud, or the new minister begins on the wrong foot".^[9]

Another option would be to seek to make a 'sequential' appointment, in which they invite a minister from outside the church to follow me as senior minister, with perhaps a gap of two or three months.

A final option is to deliberately make a 'delayed' appointment, calling perhaps in the meantime a full-time 'interim' minister to help the church with the transition. Frank Boyd argues that what he calls 'transitional ministers' can provide all the benefits of an interregnum but with the benefit of leadership.^[10]

Clearly, these are decisions for the church. Hopefully the church, in making its decision, will take advice from others. My strong recommendation to my deacons will be that they not only consult with our regional minister, but also look to appoint a minister with experience to act as a 'moderator', who will not only facilitate, but also inform their discussions. My responsibility for my successor, however, is over the moment I have led the church into the transition process.^[11]

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- [1] Tony Bradley, *Understanding the Interregnum: Making Judgments When Kings Move* (Grove Pastoral Series 67, Cambridge 1996), 1-2.
- [2] See William Bud Phillips, *Pastoral Transitions: From Endings to New Beginnings* (Alban, Bethesda, Maryland 1988) 31.
- [3] Quoted by Bud Phillips, *Pastoral Transitions*, 32-33
- [4] Jossey-Bass, San Francisco 2004.
- [5] *Elephant in the Boardroom* 14-15
- [6] Holy Cow Publishing
- [7] Ed Bratcher, 'Preparing for Retirement' 130 in *Mastering Transitions* (Multnomah, Portland, Oregon 1991) edited by Ed Bratcher, Robert Kemper & Douglas Scott
- [8] Private e-mail 18 April 2009
- [9] Private e-mail 16 April 2009.
- [10] Frank Boyd, *Three Steps Forward*, a sabbatical study privately published in 1997.
- [11] This does not rule out a formal 'hand-over' once the successor has been appointed: see Lyle Schaller, 'Helping your successor succeed', *The Christian Ministry* (May 1982), reprinted in *Leadership* (Summer 1982) 93-100.