



## Preparing for Senior Pastor Transitions in Large Churches<sup>1</sup>

Retirement sounds wonderful. And it sounds simple - pick a date, make an announcement a couple of months beforehand, deliver a great farewell sermon, be honored at a reception, and then ride off into the sunset.

Except that it's not that simple, especially when a large church has been led by the same senior pastor for many years. In truth, these transitions, whether due to retirement or a move to a new position, are incredibly complex.<sup>2</sup>

Despite the complexity, these transitions need to be done well. The consequences of poor transitions in large churches are far-reaching. Obviously, the church itself – the members and the staff – will be affected. If the transition is bumpy, some people will leave and others will be demoralized. As a result, the church's ministry impact will diminish, which will have a detrimental impact on its larger community. Finances often decline after a rocky transition, causing the church to reduce its support for internal programming, external ministries, missionaries, and denominational entities.

Healthy pastoral transitions in large congregations require (1) an understanding of the complexity of transitions, (2) effective preparation within the congregation, and (3) effective personal preparation by the senior pastor. There is also much work to be done after a new pastor arrives, but this paper will focus on the essential and often overlooked preparatory work that needs to take place.

### Understanding the Complexity of Transitions

Large congregations are inherently complex organisms. Even in seasons of stable leadership, large congregations have multiple stakeholder groups that have distinct identities and strong opinions. Decision-making processes often rely on intuition, relational capital, and history as much as on formal analysis or structured processes. At the center of this is a senior pastor or a senior leadership team (including the senior pastor) that holds everything together and provides the rest of the system with a sense of confidence and stability.

In difficult times – the departure of a dearly loved staff member, financial crisis, or controversial decision – a congregation is less likely to panic because they trust the senior pastor to steer wisely through the storm. But what happens when the “difficult time” is the departure of the senior pastor? Complexity increases. Three specific factors that make pastoral transitions complex are: (1) shifts among the congregation's multiple stakeholders, (2) the rise of systemic anxiety, and (3) loss (or questioning) of congregational identity. While many other factors play a part in the complexity of transitions, these are particularly prominent.

Every church has multiple stakeholder groups. Some are formal (e.g., the finance committee, children's ministry volunteers, Sunday school classes). Others are less formal but clearly identified based on demographics (e.g., older adults, parents of children, long tenured members). Still others are less obvious but just as significant, such as a group that has been together on several mission trips.

In times of relative stability, every group knows its role and “plays well with others.” But a retirement announcement removes that sense of stability for the congregation. Some stakeholders may try to step into a real or perceived leadership void, exerting more authority



than they should. Others may withdraw, whether out of fear of conflict or uncertainty about what to do.

For example, the finance committee may decide to prepare for a decrease in contributions during the transition. While this is an appropriate role, if they decide that the solution is to reduce expenses by terminating an under-performing staff member, they have overstepped into the domain of the personnel committee or governance board.<sup>3</sup> In contrast, the board may decide to suspend its regular meetings for several months “because we shouldn’t make any decisions until the new pastor arrives.”

In a season of transition, a congregation needs to experience unified, steady leadership. And yet, the presence of multiple stakeholder groups and the nature of those groups can make this hard to achieve.

The second layer of complexity in pastoral transitions relates to and exacerbates the first. Immediately after the retirement announcement (or even before, if rumors get out), anxiety will spread through the congregation. The anxiety around transitions is greatest at the congregation’s “center” – the senior pastor, senior level staff, key leaders, and the pastor’s spouse. These are the individuals who will be most impacted by the transition and who feel that they have the most to lose. They will be pulled into more transition-related conversations – both formal and informal – which will increase the personal anxiety they feel. Because they have significant influence in the congregation in terms of decision-making and relational connections, their anxiety will ripple outward. It will next touch other staff, leaders, and friends, and will eventually make its way to a lesser degree throughout the congregation.

Experts explain in layman’s terms that “anxiety makes people stupid.” Specifically, as people get anxious, they focus more on survival (“fight or flight”) than higher order thinking. They prioritize self-interest more than corporate concerns.

One of the essential characteristics of a healthy, large church is its ability to navigate and negotiate complex decisions among its multiple stakeholders. In the best cases, individuals and groups are willing to set aside their personal interests for the broader benefit of the body. They genuinely seek to discern where God is leading even if it is not their preferred path. This requires our brains and souls to function at their best. So just in the moment when the church faces increased complexity and needs wise leadership, anxiety shifts the collective intellectual and spiritual capacity of its leaders in the wrong direction.

The third factor that increases the complexity of pastoral transitions is a loss of identity for the congregation. Like it or not, the personality and culture of a large church is heavily influenced by the senior pastor. This is less true in congregations that have strong teams of volunteer leaders and those that have multiple worshipping communities with different preachers. But even in those cases, the senior pastor is generally the person that shapes overall priorities, has the final say in decisions, guides the process for making decisions, defines theological positions, and much more.

“We’ve always done it that way” is one of the unofficial mantras in most established churches. In large churches where a senior pastor has served for a decade or longer, that mantra is tied as much to the individual leader as to institutional traditions. Therefore, the imminent departure of that leader raises many questions about future identity: what will we continue to do (or stop doing)? What will we be known for? What will our priorities be? How will we make decisions?

Because these are core questions, the uncertainty about how they will be answered is unsettling for the congregation. When coupled with the presence of different stakeholders and the general anxiety, the congregation is ripe for rumors. A story may circulate that the next senior pastor is unlikely to support traditional worship. Or groups with different theologies that have had an



uneasy truce under the current pastor may see the transition as an opportunity to steer congregational identity toward their positions.

### **Congregational Preparation**

The job of church leaders is not to eliminate the complexity of their large congregations as they enter a season of transition. That would be impossible! Their job is to recognize this complexity and to *prepare* the congregation for what is to come.

Thoughtful and intentional preparation is a central theme of this paper. Just as complexity is unavoidable in large congregations, leadership transitions are inevitable. You can't prevent the transition from occurring, but you can choose how to prepare for one. In many cases, the preparation for a transition is inadequate and too late. To be effective, large churches that are anticipating a senior pastor transition need to:

- Clarify the selection process
- Define roles – for the outgoing senior pastor and for other leaders
- Communicate thoroughly with the congregation
- Address anxiety
- Discern the congregation's *future* needs
- Plan with the transition in mind
- Allow adequate lead time

#### *Clarify the Selection Process*

The question that dominates a pastoral transition is, "Who will our next senior pastor be?" The reality is that the *process* by which the pastor is selected is almost as important as the person. Said another way, if the congregation does not understand and have confidence in the process, the new leader will be at a distinct disadvantage from the start.

Most churches entrust the selection responsibility to a specially chosen search team<sup>4</sup> or the existing governance body, but the process doesn't begin with a blank sheet of paper. In non-denominational and congregational traditions, the church will have by-laws that dictate certain elements of the process. In other cases, denominations have specific rules that govern or guide the selection of a new senior pastor. In some cases, the denomination has full authority for the decision (e.g., appointment of pastors in the United Methodist Church). In others, the denomination must approve a slate of candidates, approve the final candidate, or give the church permission to start the search process (after completing an internal assessment).

A church's core leaders are generally aware of the denominational and governance boundaries for the selection process (or they quickly learn them once it becomes known that a transition is on the horizon). But that alone will not result in the clarity that is needed. Other leaders and members of the congregation will make assumptions based on their experiences in other churches or outside of the church. Evidence of confusion can be seen in comments such as, "Why do we have to get the Bishop's permission?" or "Shouldn't the entire church get to choose between the top three candidates?" In addition, a long-tenured pastorate means that the congregation has little, if any, institutional memory of how pastoral transitions occur.

Even if the general process and boundaries are clear, there are likely to be gray areas. For example, the by-laws may state, "The church will elect a committee to recommend a senior pastor." But how many people will be on the committee? Who decides that number? Is the



“election” an open nomination from the floor in a church-wide meeting or will a slate of candidates be presented? If the latter, who chooses the slate? These are just some of the many gray areas that can surface early, and if unattended, can cause problems later in the transition process.

In order to effectively clarify the selection process and pave the way for a smoother pastoral transition, congregations should:

- Address the gray areas in advance. Before the transition conversation becomes public, church leaders should review the rules that will govern the process (denominational and/or by-laws) and address points where confusion is likely. This may require amending the by-laws, but usually it just means defining the process in greater detail.
- Communicate the process clearly. Information about the selection process should follow soon after the announcement about the pastor’s planned retirement (or at the same time). Clear communication about the process will minimize the number of people saying “no one told us about \_\_\_\_” and maximize the congregation’s confidence in the process.
- Listen for confusion or pushback. No communication plan is perfect. Rather than getting defensive when members express concerns about the process, leaders should treat this as an opportunity to fine tune their communication.
- Specify how the congregation will be involved. In a democratic society, church members assume that they will be involved in some way in the selection process. There are a number of ways to do this at different points in the process (e.g., surveys, focus groups, invitation to submit names of candidates, meeting the recommended candidate, final congregational vote). On the front end of the process, it is important to describe when and how the broader congregation will have a voice in the decision.
- Continually look to God. The above points all focus on the mechanics of the process, but leaders and the congregation need to remember that the process to select a senior pastor should be Spirit-led. This means that decisions that are “obvious” may not be right and that the timing can’t be controlled. The congregation’s most important involvement in the process is through their prayerful support.

Another layer of complexity in the transition occurs when an associate pastor or teaching pastor at the church is *seen* as a potential successor. The phrase “seen as” in the prior sentence is important. The retiring pastor may believe the associate is ready to step into the first chair, but other church leaders may not agree. Or a segment of the congregation may fully support the associate, but that feeling may not be widespread.

This scenario underscores the importance of clarity about the selection process. Questions about an associate as a successor need to be answered at the start of the process. These questions include: Will the associate be a candidate? Do existing rules allow for the associate to become the senior pastor? (Some denominations do not allow internal succession.) Will outside candidates be considered? If the associate is a candidate but is not chosen, what are the expectations about his or her future with the congregation? There are not right or wrong answers to these questions, but a non-answer is certain to create confusion and division in the congregation.

### *Define Roles*

As previously noted, large churches are complex organizations with multiple stakeholder groups. In the shifting dynamics of a transition, it is essential that the roles of key groups be



defined (or redefined). These include denominational leaders, the governing body, the retiring senior pastor, the staff, and lay leadership.

**Denominational leaders**, as noted above, may be highly involved in the transition or may be hands-off. Large churches often view denominational leaders as unwanted “big brothers” so it is essential to define any denominational role early in the process. Even in a congregational governance model, denominational officials can be invited into the process as advisors to leverage their experience with transitions and pastoral selection. Another potentially important role for denominational leaders is in discussions about the retiring pastor’s future role. Local church leaders generally do not have the experience or emotional distance to handle these conversations on their own. Non-denominational churches may look within their networks to find some of the expertise that would otherwise be provided by a denomination.

The **governing body** (e.g., board, elders, church council) plays a central role in the transition process. They will usually be responsible for establishing the process to find the next senior pastor (within the boundaries set in the by-laws) and may select the person who will step into the role.

As important as it is to choose a successor, that is not the only responsibility in this season for the governing body. They should be prepared to work with the retiring pastor to define what his/her post-retirement role will be (discussed later). This should include setting appropriate boundaries on his/her involvement in the congregation, and then making sure those boundaries are followed. A well-intentioned but over-involved former pastor can create chaos for the church and headaches for the new pastor. The board is in the best position to set the boundaries and then intervene if problems arise.

The governing body should also create an overall transition plan. This may include a period of shared leadership between the retiring and new pastors with clearly defined responsibilities. It may include shifts in duties for other staff members. Ensuring financial stability for the church is an important element of the transition. The retiring pastor may have effectively served as the chief fundraiser by maintaining relationships with major contributors. The board does not need to take over the fundraising task or fill the financial gaps personally, but they should make sure that a sound financial plan is in place for the transition.

The transition period is a good time for the governing body to examine its own composition. While the uncertainties of a transition would seem to argue for continuity, this may be the exact time when new leadership should be recruited. If the existing governing body is closely tied to the retiring leader, that could become a problem for the incoming pastor. By the time of the leadership handoff, the governing body should include at least a few members who are independent of the outgoing pastor.

The **retiring senior pastor** faces the most significant role questions, both during and after the transition. One of the most important tasks is for the pastor to set a date for his/her retirement. The lack of a firm date adds anxiety into the congregation and makes it difficult to initiate other parts of the transition process.

Once the transition is publicly announced, he/she may feel like a “lame duck” with nothing to do other than coast toward retirement. However, the senior pastor may perform several important tasks during this season. These include:

- Using the influence of his/her position to ease congregational anxiety.
- Being one of the primary communicators of transition plans, but also making room for other leaders who will still be involved post-transition.
- Helping lay leadership groups navigate and negotiate their roles.



- Shepherding the staff, which may involve reassuring some who are nervous about the future and helping others decide that this is the right time for them to exit as well.
- Making changes that will pave the way for the next senior pastor's success.
- Leading a final initiative, whether a capital campaign or some other major push.

The retiring pastor may have some involvement in selecting his or her successor, but this is a role that is particularly tricky to navigate. The pastor has the best understanding of the skills and attributes that are necessary for the current role. But that understanding may not translate into a clear picture of *future* needs. Likewise, the retiring pastor may bring a unique and valuable perspective on potential successors, but his/her involvement in the selection decision may carry too much influence. In general, retiring pastors should offer limited input, but they should not lead the process or be regular participants in meetings about selection.

During the transition, the retiring senior pastor should also define what his/her post-transition role in the congregation will be. In most cases, it is advisable for the retiring pastor to leave the congregation, at least for a period of time, to give the incoming pastor room. There are some cases where a retiring pastor stays connected with the congregation, either as pastor emeritus (a largely symbolic role) or in some other capacity. If the retiring pastor is to maintain some connection, then the boundaries need to be clearly defined. For example, under what circumstances can he/she do weddings and funerals? These boundaries should be defined in advance based on input or guidance from lay leadership and/or denominational officials. Other post-transition role questions, as well as several other important personal issues for the senior pastor, are explored in the last section of this document.

**Staff members** are the third major stakeholder group to consider during the transition period. In a large church, many congregants feel more connected with individual staff members than with the senior pastor. As noted earlier, transition-driven anxiety among these staff members can quickly spill into the larger body. Addressing their role questions can calm these emotions.

This group's central question is, "How will the transition affect my job?" Even if they're not concerned about losing their jobs, they will be concerned about whether they will relate well to the new senior pastor and whether the transition will mean a new direction for the church or their ministry area. The retiring pastor and designated lay leadership team (generally elders or a personnel committee) should communicate with staff and set realistic expectations, but they should not make hollow promises (i.e., "You will have a job no matter who the next senior pastor is.") Another step to reduce anxiety is to keep staff in the loop as much as possible throughout the process.

**Lay leaders** will also want to know how the transition will impact them. Individuals who have been in the church for a number of years may experience a sense of anticipatory grief or loss. As noted above, some of the official leadership bodies may be confused about their roles in a time of transition and may over- or under-function. In some cases, the church may have been heavily staff-led, causing the leadership teams to be largely dormant. That is why it is essential to clarify their roles in the early phase of the transition process.

### *Communicate Thoroughly*

Effective communication is one of the most important and powerful ways to overcome the potential pitfalls during a senior pastor transition. Whenever information is lacking, rumors will rush in to fill the vacuum. This is not to suggest that every detail of the process needs to be communicated with the entire congregation. That is not practical or appropriate. But a well-designed communication strategy is essential.



Once a retirement date is made public, general updates should be shared on a regular basis. This should be done through verbal announcements, newsletters, and other established channels. A good rhythm for this kind of update is once a month. It's important for leaders to remember that the broader congregation is not living in the middle of transition decisions and is mostly in the dark.

Staff and key leaders are another important part of the communication strategy. The more that they know (within the boundaries of confidentiality), the more easily they can convey calm confidence to the rest of the congregation. Church members will ask them for updates, so they need to be armed with the right information and taught how to respond.

What kinds of things might be communicated during a process that is often long and mostly confidential? In the early stages, the communication should focus on the process (e.g., overview of the steps, selection of the search committee, submission of nominations). Near the end, the communication will focus on status updates, presentation of the recommended candidate, and the congregational vote. The middle, which is often lengthy, is the most challenging time for communication because details of the work cannot be shared. Nevertheless, communication can include generic updates (e.g., number of resumes received, narrowing of the list of candidates), desired characteristics for the next senior pastor, plans for congregational involvement, responses to frequently asked questions, and prayer requests for the process.

The bottom line is that most churches will under-communicate during a transition. A proactive communication strategy is the only way to overcome this tendency.

### *Address Anxiety*

Some anxiety is inevitable during a pastoral transition, and it tends to be greater when the outgoing pastor is beloved and long-tenured. But saying that anxiety is inevitable is not to suggest that it can't be addressed.

Anxiety in transitions is highest at the center of the organization and spreads contagiously to others, so it must be addressed first within the leadership core. Of course, this is difficult because the very people who would normally address such challenges may be part of the anxiety problem. Leaders (staff and volunteers) who have an active spiritual life and safe conversation partners (preferably outside the congregation) are much better prepared for the uncertainty of the transition. This is what can keep them from inventing and dwelling on worst case scenarios as they think about the future.

In addition to this spiritual foundation, several practical steps can reduce anxiety at the core. Leadership meetings should include time and space to talk about the emotions being experienced. These meetings are also a good place to talk about how to respond to questions and concerns from within the congregation. Without this discussion, leaders are more likely to give anxiety-laden responses that have unwanted negative impacts. Healthy leaders – those that are less anxious or at least self-aware and able to regulate their anxiety – need to step up in this season. They may confront anxious behavior or create safe places for needed conversations.

Beyond the core, effective communication and clarity about roles and process (as previously discussed) are essential elements for managing and reducing congregational anxiety. In addition, the congregation can be helped by:

- Naming the anxiety. There is no reason to deny that this is an unusual and anxiety-producing season. Better to acknowledge and then discuss how to deal with anxiety.



- Remembering the broader story. The pastoral transition won't be the first time that the congregation has experienced a significant change. Remembering moments when the church has overcome challenges can replace a "sky is falling" narrative with one of resilience and victory.
- Connecting to God's story. The most important way to address congregational anxiety is on a spiritual level. God's instruction to "fear not" and the reassurance of God's presence run throughout Scripture. Leaders and church members should be reminded of this frequently as they peer into an uncertain future.

### *Discern the Congregation's Future Needs*

Regardless of how the congregation is involved in the selection of a new pastor, discussions about future needs should be part of the transition process. These discussions are important input for those who are responsible for selection (e.g., what kind of pastor do we need?) and for the congregation (e.g., what should we expect post-transition?)

Congregations that are large and reasonably healthy tend to have a default mindset as they face a pastor's retirement, and that mindset is often a problem. It's a mindset that projects current or past needs into the future. The underlying logic is: (1) things are going well overall, so we don't need to make significant changes; (2) our retiring pastor has led well, so this is a good model (leadership style, personality) for our next senior pastor, (3) we would like to reach more young adults; (4) therefore, our next senior pastor should be a 25-year younger version of our current senior pastor.

Each of these statements may have a strong ring of truth that can be supported by compelling evidence. And yet, if the church is unwilling to ask hard questions to examine what its real future needs might be, the next pastor may simply preserve the past. In today's rapidly changing environment, that is rarely a recipe for future congregational vibrancy.

This is not to say that a congregation's past is irrelevant during a transition. "Future needs" should be based on the congregation's DNA. If a church can articulate who they are at their core – which is about culture and values, not programs – then it can discuss how that DNA should be expressed in the future.

A serious exploration of future needs during a transition often encounters two other significant challenges. The church's core leadership may have been together for a long time, and therefore is closely tied to past ways of doing things. The transition is an important time to make sure that new and different voices are invited into the discussion about future needs. Second, as those new voices make suggestions about possible changes, their ideas may be heard as criticism of the current senior pastor and other leaders. Rather than defending the past, these leaders need to encourage vigorous discussion that can truly look to the church's future needs.

### *Plan with the Transition in Mind*

Congregations often fall into one of two traps in their planning processes during the months leading up to a transition period. The first is to allow the transition to become the only priority. Normal programming will continue, but any other ideas and initiatives get put to the side because "we'll be too busy with the transition" or "we don't know what the next senior pastor will want." While church members may be anxious about who the next leader will be, they still want to be part of a vibrant church that is impacting their community with the gospel. Putting all new ideas on hold sends the wrong signal.





At the other end of the spectrum are churches that act as if the transition won't require any extra energy or attention. Their plans are full speed ahead. And yet, staff and other leaders won't have as much capacity during a period of transition.

The passing of a baton in a relay race is often used as an analogy for a pastoral transition. The goal in the handoff is to keep the baton moving around the track as fast as possible. But every track coach knows that the runners can't go full speed during the handoff. If they don't slow down a little, they will drop the baton. That's how leaders should plan during a transition – don't stop initiating new things to keep the church moving, but realize that you will need to slow down to make a smooth, healthy transition.

### *Allow Sufficient Lead Time*

It is clear that preparing adequately and thoughtfully for a senior pastor transition requires time. Sometimes a health crisis or sudden departure makes it impossible to allow this kind of preparation. But when a retirement or some other planned transition is in the works, congregations should allow at least a year for the steps leading up to the actual handoff. In fact, the search process alone often lasts more than a year in a large congregation.

What is happening during that year? Consider the illustrative timeline shown below. This timeline assumes that the retiring senior pastor has already done the personal work to be clear about a retirement date. He or she may have discussed this with church leadership as well. A healthy, proactive process should include the following phases and specific activities:

- *Quiet Phase – a year or more before retirement:* engage formal conversations with church leadership about retirement plans, clarify the selection process with church and denominational leaders, develop a communication plan for the congregation, define the congregation's future needs (as input to the selection process).
- *Public Phase – about 9 to 12 months before retirement:* announce the retirement date and selection process to the congregation, provide additional information for staff and key leadership groups, take steps to address anxiety in the system, seek congregational input regarding future needs, choose the search team, begin the search process, encourage congregational prayer, plan budgets and programs for the coming year (including the handoff).
- *Selection Phase – about 3 to 8 months before retirement:* continue to communicate with leadership and with the congregation, complete the search/selection process, announce the new senior pastor to the congregation, prepare for the current pastor's retirement, address any issues that will allow for a smoother transition for the new pastor.
- *Handoff Phase – the last 2 months before retirement:* continue to communicate transition plans, celebrate the outgoing pastor's retirement, welcome the new pastor and begin the post-handoff part of the transition.

In truth, transition conversations generally start far more than a year before a pastor's retirement. Key leaders are not unaware of the pastor's age (at least roughly). As they wait for the pastor to bring up the "R" word, they will talk among themselves about when and how a transition will occur. Pastors will have private conversations with their spouse or a few close friends. But quiet conversations on their own don't result in healthy transitions. That can only happen with thoughtful and intentional preparation.



## **Personal Preparation for the Retiring Pastor**

The congregational preparation described in the previous section is essential for a smooth transition, but it's not enough. The retiring senior pastor's personal preparation is much more than setting a date and defining his or her role for the final months at the helm. This preparation includes (1) initiating the conversation early, (2) discerning a post-transition role, (3) dealing with transition emotions, and (4) practicing humility. If these vital activities are short-circuited, it will hurt the pastor and the congregation.

### *Initiate the Conversation Early*

For a pastor who is approaching retirement, the first step of preparation is to begin the conversation. It sounds easy, but sometimes it's the hardest step. This does not mean a public conversation that will involve the congregation. Rather, these are very private conversations that can help a pastor untangle the complex thoughts and emotions that swirl around the topic of retirement.

The context and circumstances are different for each senior pastor who is facing retirement. And yet, the central questions are generally quite similar: When is the right time to retire? How will I know if my leadership effectiveness has diminished and it's time to step aside? When should we broaden the conversation with church leaders? What can I do to position the church for a transition? Can I afford to retire? What does post-retirement look like for me?

As noted in the previous section, these are the kinds of questions that need to be addressed long before the retirement countdown begins. They are complex questions that can't be answered quickly. And they are the kinds of questions that a pastor shouldn't try to work out alone.

A pastor's spouse is a vital partner in this conversation. After all, the decisions will directly affect both of them, not just the pastor. But because of this, a spouse brings his or her own fears, anxieties, and blind spots into the conversation. That is why early discussions about retirement also need to include a few trusted friends. These could be long-time leaders in the congregation who have proven to be discerning and discrete. Or they could be other pastors who have been through the retirement process. Or just close friends whose long relationship and deep love for the pastor enables them to "speak the truth in love" in ways that few others can.

"Initiate" is a key word for this step. Congregational leaders may tiptoe around retirement questions, but they are generally hesitant to be direct. They don't want to be seen as trying to push out a beloved leader. The senior pastor is typically the one who needs to get the ball rolling. Those early conversations can take many forms, but two things should be clear: a pastor's preparation for retirement needs to begin early, and it should not be a solo endeavor.

### *Discern a Post-Transition Role*

One of the benefits of modern medicine is that many people can anticipate years of good health, energy, and productivity after they retire. Some pastors look forward to personal pursuits in their retirement years – more time with family, travel, recreational activities. Many pastors, however, are ready to step away from the demands of leading a large church but can't imagine a life of total leisure. They want to find ways to continue using their gifts and experiences for Kingdom-minded endeavors.

For pastors that fall into the latter category, it is wise to begin planning their "encore" ministry before they retire. The encore may range from minimal time commitments to full-time. It may involve doing some of the same things the pastor was doing pre-retirement. For example, a retired pastor may do pulpit supply, serve as an interim pastor, or do pastoral care for another



church. But the encore may be completely different, such as coaching other pastors or serving on the board or in a leadership role for a non-profit ministry.

There are several reasons to begin exploring encore options pre-retirement. A senior pastor's connections are greatest while still on the job, and some of the people in that network can be valuable sounding boards for testing different encore ideas. The pre-retirement season can also be a good time to try small experiments with encore options. Of course, the last thing that a pastor wants to do is to rush into a major encore commitment in this season, only to regret it soon after retiring.

Perhaps the most important reason to consider encore opportunities before leaving is that it changes how retirement is viewed. Retirement can be seen negatively as being “put out to pasture.” Any hint of this mindset will cast a pall over the entire process, making the pastor and congregation less enthusiastic about the transition. That loss of enthusiasm will often translate into a lukewarm embrace of the incoming pastor. On the other hand, when the pastor is excited about whatever is coming next (whether that is purely leisure or some kind of encore), that enthusiasm will spill into the retirement conversations, setting the stage for a more positive transition.

### *Deal with Transition Emotions*

Retiring after a long-tenured pastorate is one of the most difficult transitions a person can go through. In any retirement, a person deals with questions of how to spend their time and how to make the finances work. But for pastors more than any other profession, their career and their identity are intertwined. That means they're not just walking away from a job – they're leaving behind a large part of who they are. If retirement means leaving the church, close relationships that they have nurtured for years will also be lost (or at the very least changed).

Needless to say, the months before and after retirement will stir up a variety of deep emotions – excitement and anticipation, but also anxiety, loss, grief, confusion, and even regret. Those emotions will be compounded as staff and church members seek out their *pastor* to express their own anxieties and other feelings about the upcoming transition.

This is not the time for pastors to share their emotions broadly and frequently. It's appropriate for retiring pastors to say that they love and will miss the congregation. But if they begin to articulate fears about the future or regrets about the transition, they are using their platform to transfer their anxiety to others. Doing so may be justified as honoring the congregation, but it actually enlists congregational sympathy for the pastor and works against a smooth, forward-looking transition.

This is not to say that pastors should “be strong” and push through the emotions they are feeling on their own. While that may have worked in the past, the transition is a season of uncharted waters that will provoke new and deeper emotions for the retiring pastor. Instead, personal preparation should include developing a healthy place to deal with those feelings. Most likely that “place” will be a person or people. It may be a coach or counselor, or some of the same people that were involved in early conversations about retirement. It may be a small, trusted group of other pastors or leaders who are in the same stage of life and are asking the same questions. And of course, the “place” for wrestling with emotions should include a renewed and deepened reliance on their spiritual disciplines.

Pastors have plenty of experiences with church members whose spiritual lives are characterized by “foxhole prayers.” These members have little need for God or the church until they encounter a crisis, and then they suddenly start praying, attending worship, and asking for pastoral counsel. Every pastor knows that these individuals would have been better able to deal with the



crisis (or avoid it) with a more vibrant spiritual life. In the same way, pastors in transition can't predict when the emotions and struggles of the transition will suddenly take hold. But they can prepare for these challenges by laying the right foundation in advance.

### *Practice Humility*

The biggest underlying factor in successful pastoral transitions – and the most understated one – is humility. Humility is what enables the retiring pastor to simply smile and walk away, rather than getting angry or defensive, when someone says how excited they are about the incoming pastor. Humility allows the outgoing pastor to ignore an ego-stroking invitation to comment on the new pastor's changes in strategic priorities or order of worship. Humility reminds retiring pastors it's not about them, but that the goal is a smooth and healthy transition for the church.

Practicing humility is an ongoing challenge in ministry leadership, especially for those serving as senior pastors of large congregations. The applause of colleagues and parishioners, combined with the weekly opportunity to offer life-changing guidance to hundreds or thousands of people, has the potential to make anyone feel proud and self-reliant. But just as with many of the other issues described previously, the pulls on a pastor's ego are different and are magnified in the transition season.

Changes are inevitable when a new senior pastor follows a long-tenured pastor. Sometimes the changes happen quickly, while other times nothing is changed for the first few months. The changes may be small and subtle or they may be major. But whatever the changes are and whenever they occur, the retiring pastor is likely to feel at least a little jab to his or her ego. A little voice will say, "They don't value your years of work. They're tearing down what you built." On top of this, other normal parts of the transition – not performing a funeral service, not being in the loop on important decisions – can be perceived as further slights.

Changes and perceived slights are guaranteed in a transition. The unknown is how the retiring pastor will respond. When given the opportunity to offer an opinion, will he or she speak? When an apparent offense occurs, will he or she give voice to the frustration that has been building?

In those moments, ego says, "Jump in. Your opinion still counts. You have wisdom to offer. You shouldn't be ignored." Even if retired pastors resist the more obvious and inappropriate attempts to draw them in, the ever-present risk is that they will say something as simple as, "I might have done that differently." But even that simple statement can sow seeds of doubt and division that will undermine the new pastor's authority. Great restraint is needed in these and many other situations. When ego says "jump in," humility says, "I need to keep my opinion to myself. It's OK if they do things differently than I would do."

In *Good to Great*, Jim Collins describes a hierarchy of leadership. At the top, Level 5, is a leader who "builds enduring greatness through a paradoxical blend of personal humility and professional will." Level 4 leaders are also successful during their tenure, but they lack this humility and they don't build *enduring* greatness. Collins says that "Level 5 leaders set up their successors for even greater success in the next generation, whereas egocentric Level 4 leaders often set up their successors for failure." Collins explains the mentality of the Level 4 leader: "What better testament to your own personal greatness than that the place falls apart after you leave?"<sup>5</sup>

This highlights not only the importance of humility but also the need for personal preparation. While the most dangerous ego triggers occur post-retirement, the time to set up the success of one's successor is beforehand. Pastors who are preparing for retirement will help the church understand that they are not indispensable. They can help the church realize that changes will be made under a new leader, and that these changes are not an affront to the old ways. Retiring



pastors should make a solemn commitment to support the new pastor and not meddle in church decisions in any way. Their encore plans, the board, and their network of trusted advisors should help safeguard that commitment.

No amount of congregational and personal preparation will guarantee “enduring greatness” for a church in a season of transition. It won’t even guarantee smooth sailing for the first few months after the leadership baton is passed. But it’s far better to prepare thoroughly and thoughtfully than to sail into the uncertainty of a transition simply hoping for calm seas.

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<sup>1</sup> This paper is based on my transition consulting work with pastors and congregations, along with insights from my facilitation of a group of United Methodist pastors who were nearing retirement. The group was sponsored by Texas Methodist Foundation’s Leadership Ministry.

<sup>2</sup> For simplicity, the remainder of this paper will use the term “retirement” to refer to any senior pastor’s departure that is known well in advance of the transition date.

<sup>3</sup> Governance structures vary widely between different churches, with some having multiple committees for administrative (e.g., finance, personnel, property) and ministry functions. Others consolidate decision-making authority in a single body (e.g., elders, church council, board). This paper recognizes the important role played by leadership/governance group(s) during a transition, but is not advocating a particular form of governance.

<sup>4</sup> “Search team” is the generic language used in this paper, even though actual terminology varies across different traditions.

<sup>5</sup> *Good to Great: Why Some Companies Make the Leap and Others Don’t*, Jim Collins, 2001.