

Preparing for Pastoral Transitions

**THIS MONOGRAPH EXAMINES WAYS THAT
CHURCHES, PASTORS, AND DENOMINATIONAL LEADERS
CAN BETTER PREPARE FOR TRANSITIONS.**

**INSIGHTS ABOUT PASTORAL TRANSITIONS BASED ON A CLERGY
GROUP SPONSORED BY TMF'S LEADERSHIP MINISTRY.**



INTRODUCTION

A change in senior pastors is one of the most pivotal moments in the life of a congregation. Much of the attention in a transition is focused on insuring a smooth handoff and helping the new pastor start well. But important preparatory work can be done in the preceding months, especially when the transition is a planned event such as retirement.

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This monograph examines ways that churches, pastors, and denominational leaders can better prepare for transitions. The learnings grew out of a TMF-sponsored group for pastors from large United Methodist congregations, all of whom were preparing for retirement. While the specific content focuses on retirement and large congregations, any church can gain insights that will pave the way for a healthier pastoral transition.

PREPARING FOR SENIOR PASTOR TRANSITIONS IN LARGE CHURCHES

BY MIKE BONEM¹

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 retirement² or a move to a new position, are incredibly complex.

Despite this 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 programs, external ministries, missionaries, and the denomination.

This paper will look at the large congregation as a system that in turn operates within the larger system of the annual conference. Healthy pastoral transitions in large congregations require:

1. **Understanding the complexity of transitions**
2. **Effective preparation within the congregation**
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.

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²For 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.

Three specific factors that make pastoral transitions complex are:

- Shifts among the congregation's multiple stakeholders
- Rise of systemic anxiety
- Loss (or questioning) of congregational identity

While many other factors play a part in the complexity of transitions, these three are particularly prominent.

SHIFTS AMONG THE CONGREGATION'S MULTIPLE STAKEHOLDERS

Every church has multiple stakeholder groups. Some are formal groups (e.g., the finance committee, children's ministry volunteers, a Sunday school class). 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 have. 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 staff-parish relations committee (SPRC). Or in contrast, the church council 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.

RISE OF SYSTEMIC ANXIETY

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.

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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.

LOSS (OR QUESTIONING) OF CONGREGATIONAL IDENTITY

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 bishop is going to appoint a pastor who doesn’t like 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.

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CONGREGATIONAL PREPARATION

The job of congregational 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 monograph. 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/appointment process
- Define roles – for the outgoing senior pastor and for other leadership groups
- 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/APPOINTMENT 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 behind the eight-ball from the start.

Of course, in the United Methodist Church, the bishop and cabinet have the ultimate authority and responsibility for appointing clergy. The real question in large church pastoral transitions is how much, if any, of this authority will be shared with the local church.

A key consideration is that large churches tend to draw people from a variety of denominational backgrounds (including none). Many of the members and leaders in these congregations do not understand Methodist polity. They assume that they will be involved, or even have full authority, in the selection process. Furthermore, a long-tenured pastorate means that the congregation has little if any institutional memory of how pastoral transitions occur.

In recent years, several non-traditional processes have been used to appoint new senior pastors to large UMC churches. These include:

- The bishop³ identifies a small number (typically two or three) of potential successors and invites church leadership⁴ to give input on each.
- An associate pastor in the church is intentionally groomed, typically over several years, as the successor for the senior pastor. This process is done with the bishop's support and may include a period when the two pastors share the lead role (e.g., both as co-pastors or the associate as "senior pastor designate").
- Church leadership is authorized to "search" for potential successors, and then the bishop makes the final decision.
- With the bishop's permission, the church hires a company that specializes in doing searches for senior pastors. The company identifies and screens potential candidates, and then church leaders and the bishop make the final decision.

As more authority is shared with the local church, as in the latter two examples above, clear boundaries are needed before starting the process. Can they look outside their conference, and if so, what are the steps for doing so? When and how can they contact candidates?

The bottom line is that the selection/appointment process needs to be well-defined and communicated. Denominational leaders, the retiring senior pastor, and church leadership need to be involved early in these conversations. Failure to do so will lead to confusion in the short run and is likely to create problems later in the transition process.

³"Bishop" in this section may refer to the bishop, the district superintendent, or the cabinet collectively.

⁴"Church leadership" with significant involvement in the selection/appointment decision will generally be the SPRC and/or the administrative board (or church council). In some cases, a special ad hoc group may be established for this process.

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 retiring senior pastor, the staff, and lay leadership.

Denominational leaders (bishop and cabinet) in the United Methodist Church are responsible for appointing clergy. As discussed in the previous section, this responsibility may be shared with local church leaders in a variety of ways. It is essential to define this sharing early in the transition process. Denominational leaders should also be involved in discussions about the retiring senior pastor's future role (discussed below). Local church leaders generally do not have the experience or emotional distance to handle these conversations on their own.

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

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 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 SPRC) 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 that they will be able to 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, roles in the selection process). Near the end, the communication will focus on status updates and presentation of the new pastor. 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 general updates, desired characteristics for the next senior pastor, plans for any 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.

Several practical steps will help reduce the 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 narrative that the "sky is falling" 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 may need to be reminded of this frequently as they peer into an uncertain future.

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.

DISCERN THE CONGREGATION'S FUTURE NEEDS

Regardless of whether 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/appointment (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.

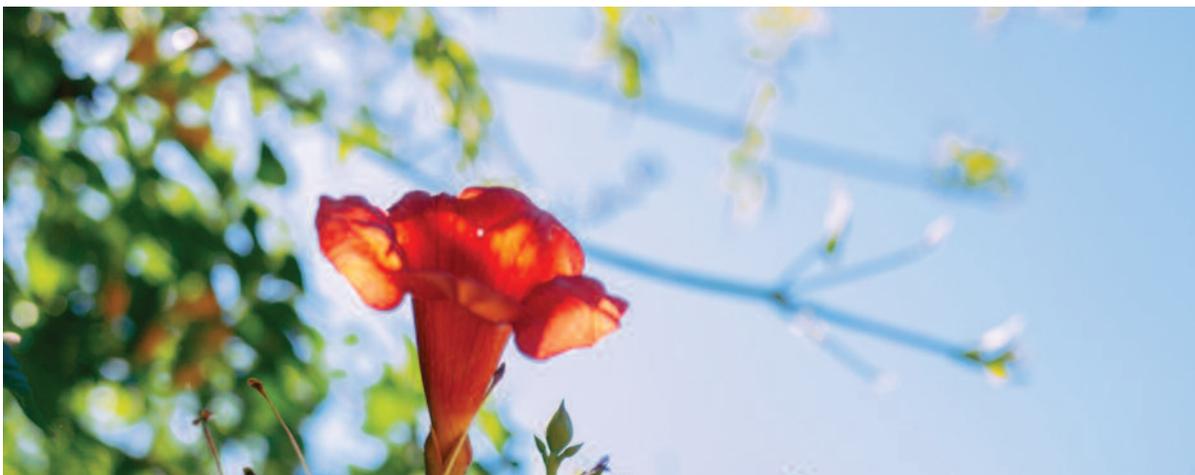
At the other end of the spectrum are churches that act as if the transition won’t require any extra energy or attention. Their plans are full speed ahead. And yet, staff and other leaders won’t have as much capacity during a period of transition.

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 must slow down a little to make the handoff. If they don’t slow down, 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 new appointment 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.**

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** – about a year before retirement:

- ❑ engage formal conversations with church leadership about retirement plans
- ❑ clarify the selection/appointment process with the Bishop/Cabinet and with church leadership
- ❑ begin the “search” process⁵ for the next senior pastor
- ❑ develop a communication plan for the congregation
- ❑ define the congregation’s future needs (as input to the selection process)

■ **PUBLIC PHASE** – about 8 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
- ❑ continue the search process
- ❑ seek congregational input regarding future needs
- ❑ plan budgets and programs for the coming year (including the handoff)

■ **SELECTION PHASE** – about 3 to 6 months before retirement:

- ❑ continue to communicate with leadership and with the congregation
- ❑ complete the selection/appointment 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.

⁵As described earlier in this document, the “search” can be done in a variety of ways. In any of the options, however, it is clear that the selection/appointment of a senior pastor for a large congregation will take longer and will not be identical to the process for smaller churches. The more that the process deviates from the standard appointment process – for example, active involvement of leaders from the church, consideration of candidates from other conferences, use of a search firm – the longer the process will take.

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.

Effective personal preparation includes:

- Initiating the conversation early
- Discerning a post-transition role
- Dealing with transition emotions
- 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 get out of his or her own head and begin to 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 that my leadership effectiveness has diminished and that 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

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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 job 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 also means leaving the church, the 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. There are likely to be feelings of excitement and anticipation, but also ones of 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 emotions. 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 their emotions must 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 be better prepared 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. It's what is needed to keep from responding to the ego-stroking invitation to offer an opinion about the way the new pastor has changed the church's 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?”⁶

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

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⁶*Good to Great: Why Some Companies Make the Leap and Others Don't*, Jim Collins, 2001.

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 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. 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.



Notes

Lined writing area for notes, featuring horizontal lines and a background image of a building and trees.