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Succession Planning
Essential Elements of Successful Succession Planning

By
Jeffrey D. Lee

A Dissertation Submitted to
the Faculty of Covenant Theological Seminary
in Partial Fulfillment of the Requirements for the Degree of
Doctor of Ministry.

Saint Louis, Missouri

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Abstract

The purpose of this study was to discover how senior pastors create organizational continuity through their succession plans. Churches face significant challenges when senior pastors retire or transition without succession plans.

This study utilized a qualitative design using semi-structured interviews with seven pastors. The seven pastors played key roles in their church's succession planning process. The interviews focused on gaining data, by asking four research questions: How do senior pastors seek to create organizational continuity before their transition? What are the challenges of succession planning? What are essential elements of the succession planning process? What are strategies that could reduce the organizational anxiety that congregation's experience in successions?

The literature review focused on surveying insights and best practices related to successful succession planning in the following fields of inquiry: biblical successions, leadership successions in organizations, leadership successions in churches, organizational change management, organizational systems, and organizational anxiety.

This study concluded that there are ten significant findings and ten actions that can reduce congregational anxiety and enhance the organizational continuity during a succession. The study found that congregations should be understood as emotional systems and that senior pastor transitions cause organizational anxiety. Self-differentiated leaders are essential to a healthy succession planning process, due to the emotional nature of the congregation. Succession plans that create organizational continuity must be aligned with a church's mission, vision, and values.

The most important person in the succession planning process is the transitioning senior pastor. Senior pastors who remove significant barriers for their successor's benefit have more succession success than those that do not. Contrary to popular belief, differentiated senior pastors can remain on staff after their transition in a reduced role. The longer the tenure of the transitioning senior pastor, the longer the succession planning process ought to be.

Ten hiring practices were recommended to alleviate the challenge of finding and hiring a successor: hire a culture fit, hire and develop an internal candidate, hire a young generalist, hire a successor years before their transition, and hire a succession consultant. Within the succession plan, essential elements emerged as key pieces of the succession plan: creating a timeline, teaching team, emergency succession plan, communication plan, and celebration plan for the transition.

To pastors, my brothers in Christ, love your people by preparing them for your end and another beginning.

A healthy pastoral transition is one that enables a church to move forward into the next phase of its external and internal development with a new leader appropriate to those developmental tasks, and with a minimum of spiritual, programmatic, material, and people losses during the transition. A church is not a static institution, but a living organism that is growing and that builds future growth on past learning. Healthy transitions hold on to what is good.

— Carolyn Weese & J. Russell Crabtree,

The Elephant in the Boardroom

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Abbreviations

BCO	Book of Church Order
BFST	Bowen Family Systems Theory
CEO	Chief Executive Officer
CHRO	Chief Human Resources Officer
HBR	Harvard Business Review
ICF	International Coaching Federation
PCA	Presbyterian Church in America
SBL	Society of Biblical Literature
SHRM	Society of Human Resource Management

Chapter 1

Introduction

Wise pastors plan for their end at their beginning. And that end can cause great upheaval for the church.¹ While pastoral tenures vary in length, one constant remains: all tenures have their end. Many churches are not prepared for a change in leadership, nor are they aware of the need to plan for that change.

Influential author, podcaster, and conference speaker, Carey Nieuwhof understands the urgency of this problem, saying, “Of all the issues the church needs to deal with in the next ten years, succession is near the top of the list.”²

Why is succession an urgent issue the church needs to address? Executive Director of Lifeway Research Scott McConnell in his article, “Are More Pastors Quitting Today?”, explains that Covid-19 has heightened pastoral burnout around the country, resulting in many unplanned transitions. Fifteen hundred pastors surveyed in Lifeway’s research are either considering accelerated transitions to find a better church fit or contemplating a transition out of ministry for respite.³ Also, the “Great Resignation”⁴

¹ William Vanderbloemen and Warren Bird, *NEXT: Pastoral Succession That Works* (Grand Rapids, MI: Baker Books, 2014), 22.

² Carey Nieuwhof, “The Looming Pastoral Succession Crisis and Why It’s Already Bad,” CareyNieuwhof.com, May 14, 2018, <https://careynieuwhof.com/the-looming-pastoral-succession-crisis-and-why-its-already-bad/>.

³ Scott McConnell, “Are More Pastors Quitting Today?,” *Lifeway Research* (blog), May 13, 2021, <https://lifewayresearch.com/2021/05/13/are-more-pastors-quitting-today/>.

⁴ Derek Thompson, “The Great Resignation Is Accelerating,” *The Atlantic*, October 15, 2021, <https://www.theatlantic.com/ideas/archive/2021/10/great-resignation-accelerating/620382/>.

following Covid has triggered a cascade inside and outside the church.⁵ Pastors are quitting or retiring early, student enrollment in most evangelical seminaries is trending down,⁶ and the average age of the American pastor is rising. Barna Group, in collaboration with Pepperdine University, conducted a survey of 10,000 pastors across forty denominations and found that the percentage of pastors aged between 56 and 64 grew 15 percent since last surveyed in 1992. Pastors aged 65 and older rose 9 percent in the same time frame.⁷ The evidence indicates that American pastors are getting older. While these statistics may not seem alarming at first glance, when the data of the rising age of the average American pastor is compared with the average retirement age of a senior pastor, 65,⁸ the urgency of succession planning becomes clear.

Even if churches ignore the impact of Covid-19 on pastors and the rising age of American pastors inching toward retirement, the five-to-eight year average pastoral tenure⁹ ought to cause churches to take a serious look at succession planning. But as Dr. Joseph Lucky in his recent dissertation on pastoral succession concludes, it is rare that churches have a formal succession plan written.¹⁰

⁵ William Vanderbloemen, “4 Ways Churches Should Respond To ‘The Great Resignation,’” October 4, 2021, <https://www.vanderbloemen.com/blog/response-to-great-resignation>.

⁶ “ATS Enrollment Data: CTS, TEDS, WTS, GCS,” Data Visualization (Pittsburgh, PA: Association of Theological Schools, February 22, 2023), <https://www.ats.edu/Data-Visualization>.

⁷ Barna Group, *The State of Pastors* (Ventura, CA: Tyndale House Publishers, 2017).

⁸ Vanderbloemen and Bird, *Next*, 22.

⁹ Trevin Wax, “The Myth of the Church Hopping Pastor,” *The Gospel Coalition* (blog), April 12, 2007, <https://www.thegospelcoalition.org/blogs/trevin-wax/the-myth-of-the-church-hopping-pastor/>.

¹⁰ Joseph Lucky, “Succession Planning in Pastoral Leadership: A Qualitative Case Study” (Ashland, OH, Ashland University, 2021), https://etd.ohiolink.edu/apexprod/rws_etd/send_file/send?accession=ashland1630005693155453&disposition=inline.

If pastoral tenures are typically so short, then why are churches caught off guard when pastoral transitions happen? It could be due to the abrupt nature of a moral failure, sudden death, theological shift, job offer, or poor communication and planning between the pastor and the leadership of the church. But the CEO and founder of the Vanderbloemen Search Group, William Vanderbloemen, believes any sudden shock results from a lack of foresight and strategic planning.¹¹

No pastor is immortal, morally impervious to sin, immune to pain, trauma, burnout, retirement, or an alluring offer by another church. Therefore, why are churches so ill prepared to handle pastoral transitions? If transitions are normative in the natural lifecycle of the church, why aren't succession plans commonplace?

According to authors Carolyn Weese and J. Russel Crabtree, "Silence seems to be rooted 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."¹² They saw that many pastors failed to plan for their succession because they were not emotionally or financially prepared for it, so they did not want to accelerate their timeline.

The other underlying concern authors Weese and Crabtree recorded was "low self-confidence" in mission continuity without the pastor at the helm. They said pastors feared "creating a lame duck situation in which effective ministry could become impossible"¹³ resulting in a host of unintended consequences, which they were

¹¹ Vanderbloemen and Bird, *Next*, 21.

¹² Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom: Speaking The Unspoken About Pastoral Transitions*, A Leadership Network Publication (San Francisco, CA: Jossey-Bass, 2004), 14.

¹³ Weese and Crabtree, *The Elephant in the Boardroom*, 15.

unprepared to manage with their limited resources. They also feared the result would lead to a congregation with no alternative but the triple whammy of emotional, organic, and organizational change all at the same time.

William and Susan Bridges in their best-selling book, *Managing Transitions*, call this transitional phenomenon, “getting stuck in the neutral zone.”¹⁴ In this zone, people’s anxiety rises, and motivations fall due to a lack of vision, clarity, communication, and strategic planning. Bridges notes that people often feel disoriented in times of unplanned or sudden transition, resulting in confusion, energy loss, resentment, and self-protective coping strategies because of their sense of free-fall. “This is the psychological no-man’s-land between the old reality and the new one.”¹⁵

What would help lead God’s people out of this psychological no-man’s land? According to Dr. Noel Tichy, author, professor, and succession expert, the answer is a strategic plan that creates continuity between the old and new reality.¹⁶ A wise plan honors the past, protects the mission, vision, values, and key ministries, while building a bridge toward the future.

Author and CEO of HOPE International, Peter Greer in his book, *Succession*, reinforces this assertion, writing that a successful succession preserves the long-term health and vitality of the on-going mission. The mission carries on even if the senior

¹⁴ William Bridges and Susan Bridges, *Managing Transitions: Making the Most of Change* (Hachette Books, 2017), 5.

¹⁵ Bridges and Bridges, *Managing Transitions*, 9.

¹⁶ Noel Tichy, *Succession: Mastering The Make or Break Process of Leadership Transition* (New York, NY: Penguin Group, 2014), 21.

leader does not. And the only way to prepare for that transition is to invest in the leaders who will carry the mission onward.¹⁷

Leadership experts and authors Tom Saporito and Paul Winum express the same sentiment in their book, *Inside CEO Successions*, explaining the power and value that leadership development pipelines and programs can have on mission continuity during leadership transition. They write that companies that invest in high-potential employees by providing significant training opportunities and stretching assignments naturally develop potential successors. They add that successful transitions are often the product of dynamic leadership development programs that instill core company values, while building-up the necessary hard and soft skills needed for the transitioning role. Talent pipelines strategically built within companies consistently turn out great leaders who embody the mission and values of the organization, creating stability and forward progress, even in times of significant leadership transition.¹⁸

Carrying the mission forward through ongoing leadership investments and bridge building is similar to bridge building in organizations and even family businesses.¹⁹ The work of transferring power in many family businesses from one generation to the next is complicated, emotional, and consequential. In both organizations, succession factors are size, governance structure, key relationships, core values, leadership styles, communication channels, and leadership pipelines, which either make or break the

¹⁷ Peter Greer and Doug Fagerstrom, *Succession: Seven Practices to Navigate Mission-Critical Leadership Transitions* (Amazon Kindle Direct Publishing, 2020), 21.

¹⁸ Tom Saporito and Paul Winum, *Inside CEO Succession: The Essential Guide to Leadership Transition* (Hoboken, NJ: John Wiley & Sons Canada, Ltd., 2012), 132-143.

¹⁹ Christopher Polski, “Transition from Founding Pastor to First Successor Pastor: Every Pastor Is an Interim Pastor” (DMin Dissertaton, Saint Louis, MO, Covenant Theological Seminary, 2020).

transition process.²⁰ But as pastor and succession expert Christopher Polski notes in his dissertation on pastoral transitions, “Despite there being a proliferation of resources and experts on the matter of family business succession, research suggests that most senior leaders still have not put the thought or time into the matter that they should.”²¹ The issue of succession even in family businesses is underdeveloped.

Authors Josh Baron and Rob Lachenauer write, “To make a good transition, you need a continuity plan that maps out the path from the current generation of ownership to the next. Picture each generation on opposite sides of a canyon. If you just keep going along as you were, you will go right off the cliff. You need to build a bridge across the chasm.”²²

The bridge they suggest is a strategic plan identifying a clear path to prepare, test, and develop the internal candidate, while also creating a timed glide path for the current leader to exit.²³ If the family firm looks outside of its current set of family members or employees for the next successor, then they suggest establishing a clear and transparent process with the governance board. Continuity is king in transitions.

MIT professor and founder of Harvard’s Family Business Management studies program, John A. Davis, agrees that strategic transition plans must be built for the long-term health and viability of the organization. In his article, “Planning a Family Enterprise

²⁰ Josh Baron and Rob Lachenauer, “Build a Family Business That Lasts,” *Harvard Business Review*, February 5, 2021.

²¹ Polski, *Transition from Founding Pastor to First Successor Pastor*, 6.

²² Josh Baron and Rob Lachenauer, *Harvard Business Review Family Business Handbook* (Boston, MA: Harvard Business School Publishing, 2021), 124.

²³ Baron and Lachenauer, *Harvard Business Review Family Business Handbook*, 131.

Succession,” he notes, “Momentum, or forward movement of a business or family, is an underappreciated force that we need to be very respectful of. If you kill, stall out, or even significantly reduce the momentum in a system, it’s hard to make it up.”²⁴

Davis explains that family firms need to grow their financial assets, develop talent for the whole enterprise, and maintain group unity to stay ahead of company, family office, and family-related challenges. Maintaining momentum must include preparing for and making a transition from one generation of ownership, governance, and leadership to the next. Steady progress towards a successful handoff is a far better strategy than ignoring preparation and taking chances at the end of a generation. He continues, “Both generations need to be running at the same speed for a smooth pass. You need to pass the baton when the next generation is ready to lead — not when you’re ready to leave.”²⁵

Creating a deliberate plan to pass on institutional knowledge, local resources, job specific skills, and a clear understanding of expressed and unexpressed expectations are essential in successful succession planning. But these initiatives pale in comparison to the vital need of developing the next leader’s relational capital in the power transference. Family Firm experts Dr. Will Tabor, professor at Belhaven University, and Dr. James Vardaman, professor at Mississippi State University, emphasize, “Familiarity breeds trust and cooperation as employees need time to become comfortable with a successor. The relational capital created between the successor and employees from these interactions

²⁴ John Davis, “Planning a Family Enterprise Succession | John Davis | MIT Sloan,” *John A. Davis* (blog), February 28, 2019, <https://johndavis.com/what-to-watch-when-planning-a-family-enterprise-succession/>.

²⁵ Davis, "Planning a Family Enterprise Succession."

can be pivotal in fostering acceptance for family succession well before the handoff occurs.”²⁶

Josh Baron and Rob Lachenauer agree. They write, “When high levels of power and trust mainly reside with a few key members of an organization, it is paramount that the process of transferring that power, knowledge, and trust be carefully planned out and widely expressed.”²⁷ Organizational trust takes time to build, but it is easy to lose if mismanaged.

Internationally recognized leadership experts Ronald Heifetz, Alexander Grashow, and Marty Linsky share a similar sentiment, expressing the need for adaptive organizations to double down on their efforts to train high potential talent within an organization. They conclude that talent pipelines are central to an organization’s adaptive potential. High potential employees within the organization need clear on-the-job guidance, action learning opportunities, and feedback to learn where they can make their greatest contribution.²⁸ Succession plans are another clear indicator of how well an organization is developing its leaders. As a litmus test, they often ask executives whether they have identified the two or three people with the capacity to do their jobs better than they can. And if so, what they are doing to nurture and mentor these individuals?²⁹ The answers to these questions are telling.

²⁶ James Vardaman and Will Tabor, “The Key to Successful Succession Planning for Family Businesses,” *Harvard Business Review*, Succession Planning, May 15, 2020, <https://hbr.org/2020/05/the-key-to-successful-succession-planning-for-family-businesses>.

²⁷ Baron and Lachenauer, “Build a Family Business That Lasts.”

²⁸ Ronald A. Heifetz, Marty Linsky, and Alexander Grashow, *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World* (Harvard Business Press, 2009), 104-105.

²⁹ Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership*, 104-105.

As family firms and organizations need to value open communication, leadership development, and continuity during times of significant transition, so does the church. The lack of literature in print or online about clergy relocation, pastoral succession, or pastoral transition suggests that the church does not. Churches ought to be planning for the sudden or eventual departure of their beloved minister and working to build bridges with possible successors well in advance of that day. Succession and continuity planning ought to be commonplace.

Almost every church experiences the reality of multiple pastoral transitions. Vanderbloemen counsels, “Consider these numbers about pastoral succession among US Protestants: The average senior pastor tenure is 8 years, a number that has inched upward over the years. The average senior pastor career is 18 years, which suggests the typical pastor faces succession two or more times. And the average senior pastor plans to retire from full-time active ministry at age 65.”³⁰

Long gone is the practice of pastoring a single church for life until retirement. Therefore, the need to plan for the future pastoral transition of the local church is now. Failure to do so will cost the church momentum, money, and staff, often leading to poor performance by those newly hired, loss of organizational knowledge, and ill-prepared internal leadership.³¹ In organizations of any size, a failure to plan for eventual succession also leads to a loss of organizational momentum, which creates unnecessary financial risk and de-emphasizes leadership development pipelines. This leadership failure also

³⁰ Vanderbloemen and Bird, *Next*, 22.

³¹ Claudio Fernandez-Araoz, Gregory Nagel, and Carrie Green, “The High Cost of Poor Succession Planning,” *Harvard Business Review* 99, no. 3 (June 5, 2021): 98–107, <https://hbr.org/2021/05/the-high-cost-of-poor-succession-planning>.

unintentionally promotes quick or lazy hiring practices and often lowers morale for high performing employees.³² Complicating matters further, the psychological costs, not just the financial costs, of hiring an outside search firm can weigh heavily on a congregation.³³ The unanticipated collateral costs can be significant.

Global managing succession consultants Åsa Björnberg and Claudio Feser understand these additional costs. “Many companies treat the CEO succession as a one-off event triggered by the abrupt departure of the old CEO, rather than a structured process. The succession is therefore often reactive, divorced from the wider system of leadership development and talent management.”³⁴ Organizations can potentially discount good candidates who may not have sufficient time or encouragement to work on areas for improvement. They conclude, “Unpolished talent could be overlooked and companies may gain a damaging reputation for not developing their management ranks. Ideally, succession planning should be a multiyear structured process tied to leadership development.”³⁵

If succession planning was a multi-year process, what might the benefits of time, communication, and leadership development offer the church? Succession is not an event; it is a process. It is a complex process that requires collaboration, time, strategy, and prayer. For the church to make a course correction, best practices are needed to build a solid foundation for the future.

³² Fernandez-Araoz, Nagel, and Green, "The High Cost of Poor Succession Planning."

³³ Weese and Crabtree, *The Elephant in the Boardroom*, 30.

³⁴ Asa Björnberg and Claudio Feser, "CEO Succession Starts with Developing Your Leaders | McKinsey," accessed September 10, 2021, <https://www.mckinsey.com/featured-insights/leadership/ceo-succession-starts-with-developing-your-leaders>.

³⁵ Björnberg and Feser, "CEO Succession Starts with Developing Your Leaders."

Statement of the Problem

Sustained ministry momentum from generation to generation is rare in the life of the church. However, it does not have to be. Much research describes the importance of organizational succession planning in family businesses and corporations but not pastoral succession planning. The unique dynamics of the senior pastor's role in the life of the church and a set of best practices for succession planning have not been significantly explored. There is a need for a set of best practices to guide senior pastors and church leaders through multi-year succession plans.

Purpose Statement

Therefore, the purpose of this study was to discover how senior pastors create organizational continuity through their succession plan.

Research Questions

In order to best ascertain the factors that were most influential, this study focused on the following research questions.

1. How do senior pastors seek to create organizational continuity before their transition?
2. What are perceived challenges of succession planning?
3. What are essential elements of the succession planning process?
4. What are strategies that could reduce the organizational anxiety that congregation's experience in successions?

Significance of the Study

This study has significance for all senior pastors and churches because they all will experience at least one pastoral transition. With the wisdom of many leadership experts, godly scholars, and senior pastors who have led successful pastoral transitions, vital principles and practices can be learned and applied. Through best practices research, continuity of the church's mission, vision, and values can be protected and enhanced.

With more specific research in pastoral succession planning, churches, pastors, and ministry leaders will be able to access more resources, tools, examples, and best practices for the preservation and long-term health of churches in transition. Furthermore, denominational agencies would benefit from the insights derived from this study, as they provide guidelines for churches and ministers considering retirement, relocation, or transition. Greater guidance from a respected denominational agency could lead many churches to consider thoughtful succession practices and processes.

Definition of Key Terms

Presbyterian Church in America (PCA) – A Reformed, Presbyterian, and evangelical denomination founded in the USA in 1973.

Teaching Elder – A seminary trained and ordained minister of the gospel, able to teach, preach, counsel, and moderate the session of a local church.

Ruling Elder – A member of a local church, elected to oversee and shepherd a congregation.

Session – A governing body of a local church, consisting of at least one teaching elder and one ruling elder.

Associate Pastor – A person in ministry leadership with a given title of “pastor” serving a local church under the leadership of a senior pastor.

Pastoral Succession – The intentional process of the transfer of leadership, power, and authority from one leader to another.

Succession Planning – The process of creating a strategic plan for what will happen before, during, and after a leadership departure.

Continuity Planning – The process of building a bridge, transferring (1) knowledge, (2) assets, and (3) roles to the next leader.

Culture – A set of consistent patterns people follow for communicating, thinking, and acting, all grounded in their shared assumptions and values.³⁶

Culture Fit – The ability of a candidate to conform and adapt to the core values and collective behaviors that make up an organization.

Organization – A group of employees, resources, or job positions, tasked with a specific mission, goal, or service.

Leadership Development – The intentional process of identifying and expanding the capacity of individuals to perform in leadership roles within organizations.

Action Learning – A learning experience that includes a problem, an action, and built-in reflection process.

Best Practices – The reproducible methods, actions, or processes with a proven record of effectiveness for a given context.

Anxiety – An emotion characterized by feelings of tension, worried thoughts, and physical changes like increased blood pressure.

³⁶ Michael Watkins, *The First 90 Days* (Boston, MA: Harvard Business Review Press, 2013), 30.

Organizational Anxiety – The collective experience of intense feelings of apprehension, fear, and worry by stakeholders.

Communication Plan – A comprehensive listing of all the audiences, messages, communication types, and vehicles relevant to stakeholders experiencing a change or transition in an organization.

Chapter 2

Literature Review

The purpose of this study was to discover how senior pastors create organizational continuity through their succession plan. Ultimately, this study seeks to provide senior pastors and churches with a set of best practices that will build systematic continuity in senior leader transitions. To provide a broad foundation for this study, the literature review explored several related categories.

First, to establish a biblical framework for succession planning, the researcher explored two positive leadership transitions: Moses and Joshua first, and then Paul and Timothy. This study examined multiple scripture passages to provide biblical principles for successful succession plans, as well as a foundation for the practice of developing succession plans within the life of the church.

Second, to discover key elements in the succession planning process, succession literature was examined. The researcher noted CEO and senior pastor transitions. The examination of this literature covered the key people, timeline, candidate profile, communication plan, internal leadership pipeline, emergency plan, and celebration of the outgoing leader. These key elements were researched as essential succession elements across corporate and religious institutions.

Finally, an exploration of systems literature was examined to discover key leadership traits and decisions that reduced organizational anxiety in leadership transitions. Organizational anxiety was analyzed, defined, and discussed in relationship to planned and unplanned transitions. To study practices that minimize organizational

anxiety during leadership transitions, leadership traits, such as self-differentiation and maintaining a non-anxious presence, were also analyzed.

Biblical Succession

The origin of succession planning does not find its beginning in modernity. It is an intentional process of stewarding knowledge, people, processes, and resources for the sustainable future of God's people and is found in the Bible.

Succession plans have been ordained by God, and he instituted the bridge building process.³⁷ God is stability, and out of the overflow of his being, he gifts stabilizing processes to his people for their collective benefit. God is always working to connect, protect, and provide for his people in every generation.³⁸

The Son of God appeared in resurrected form to the disciples before his ascension, delivering these empowering words in John 20:22-23:

Peace be with you. As the Father has sent me, even so I am sending you. Receive the Holy Spirit. If you forgive the sins of any, they are forgiven them; if you withhold forgiveness from any, it is withheld.³⁹

Biblical scholar Michael Wise notes that these verses might be up for debate in some theological circles, but their implication about the transfer of God-ordained power from one leader to another is clear. Jesus publicly conferred his authority to his disciples,

³⁷ Titus 1:5-9.

³⁸ Psalm 119:90.

³⁹ John 20:22-23.

post resurrection yet before his ascension.⁴⁰ Dr. Larry Gilpin, a pastor and pastoral transition expert, notes that although Jesus' authoritative position is non-repeatable, he gave his disciples direct instructions and responsibilities to carry out after he ascended into heaven.⁴¹ On the eve of his ascension, one of Jesus' main objectives was to publicly transfer power and authority to his successors, so they might continue expanding the kingdom of God.

Jesus' instructions before his departure highlighted the importance of publicly acknowledging transitions. He understood wind-down principles and managed his departure with clarity and grace. The closer Jesus moved towards his transition, the more detailed his instructions became about what would come next for his disciples.⁴² Before he transitioned into the heaven, he publicly commissioned his disciples.⁴³ Jesus' earthly tenure, as the leader of his church, was short in duration, but in the three years of his public ministry, he developed and conferred power upon his twelve successors.⁴⁴

Dr. Mark D. Roberts, a Senior Strategist for Fuller's Max De Pree Center for Leadership, agrees, noting that in the era of the new covenant, Jesus foreshadowed the collegiality that would become the hallmark of the Spirit-filled church by developing his under-shepherds and sending them out two by two, testing their faith, leadership, and

⁴⁰ Michael Wise, "A Biblical Model for Leadership Succession," *National Association of Evangelicals* (blog), n.d., <https://www.nae.org/a-biblical-model-for-leadership-succession/>.

⁴¹ Larry Gilpin, *When Your Long-Term Pastor Leaves Your Church* (Taylors, SC: Great Writing Publications, 2016), 32.

⁴² Weese and Crabtree, *The Elephant in the Boardroom*, 23.

⁴³ Matthew 28:16-20.

⁴⁴ Mark 6:7.

resolve.⁴⁵ Being the Good Shepherd of his flock,⁴⁶ Jesus trained and commissioned his replacements so his people would know who to follow and trust in his physical absence.⁴⁷

By the time of Jesus' ascension into heaven, the people of God were well acquainted with leadership transitions. After the fall of Adam and Eve in Genesis 3, humanity's life-span was reduced to 120 years,⁴⁸ necessitating leadership transitions. Leadership, post-fall, became a temporary assignment. Leaders commissioned by God after the Noahic covenant had shortened tenures, reduced to a few decades.⁴⁹ With less time to lead God's people towards the fulfillment of his creation mandate, leaders then needed to prepare the next generation of leaders to carry the mandate forward.

The Lord, remaining steadfast to his covenants, raised up new leaders to provide transitional grace and mercy towards his unfaithful people.⁵⁰ Positive leadership transitions, such as Moses to Joshua, Elijah to Elisha, Jesus to the twelve disciples, and Paul to Timothy, serve as examples of God's favor for pro-active leadership.

The scriptures also contain cautionary tales, like that of Joshua to Israel's judges, Saul to David, and David to Solomon. These examples illustrate the collateral damage that reactive leadership causes and the negative systemic impact they have on the people of God. To determine best biblical practices for pastoral successions, this study focused

⁴⁵ Mark Roberts, "Why Did Jesus Send Out His Disciples Two By Two?," *Fuller De Pree Center* (blog), September 28, 2016, <https://depre.org/why-did-jesus-send-out-his-disciples-two-by-two/>.

⁴⁶ John 10:11.

⁴⁷ Matthew 28:16-20.

⁴⁸ Genesis 6:3.

⁴⁹ Genesis 25:7, 50:26, Deuteronomy 34:7, Judges 2:8, 1 Kings 2:11, 11:42.

⁵⁰ Judges, 1 & 2 Chronicles.

on positive biblical transitions. The two transitions in view are Moses to Joshua and Paul to Timothy.

The transition from Moses to Joshua serves as a succession model because of its positive results, as well as the amount of data provided. Key details about Moses' call to leadership, character, and leadership transition to Joshua provide ample evidence for the essential people and processes that create a foundation for successful succession planning. Exodus, Deuteronomy, Numbers, and Joshua further detail Joshua's leadership preparation, call to leadership, transfer of power, and post-transition leadership successes.

In the New Testament, Luke and Paul provide significant data about Timothy's selection, development, and transition. Paul, prior to his death, provides important details and insights into his mentoring methodology, preparing Timothy as a successor. Stacy Hoehl, writer and leadership expert, agrees, saying that 1 and 2 Timothy reveal Paul's intentions for Timothy, training and commissioning him for the work of a successor.⁵¹

Biblical Succession: Moses to Joshua

The leadership transition from Moses to Joshua reveals God's intention from generation to generation. God's plan to secure the land of Canaan for his people was made possible through a succession. The Lord, having foreordained the end of Moses' days, prepared Joshua to lead Israel into the promised land.⁵² Deuteronomy 3:27-28

⁵¹ Stacy Hoehl, "The Mentor Relationship: An Exploration of Paul as Loving Mentor to Timothy and the Application of This Relationship to Contemporary Leadership Challenges," *Journal of Biblical Perspectives in Leadership* 3, no. 2 (2011).

⁵² Peter Craigie, *The Book of Deuteronomy*, The New International Commentary on the Old Testament (Grand Rapids, MI: William B. Eerdmans Pub. Co, n.d.), 370.

records God’s strategic plan for his people by sharing with Moses an advanced look at his end and Joshua’s beginning, stating:

Go up to the top of Pisgah and look west and north and south and east. Look at the land with your own eyes, since you are not going to cross this Jordan. But commission Joshua, and encourage and strengthen him, for he will lead this people across and will cause them to inherit the land that you will see.⁵³

God spoke directly to Moses and told him that he would not lead the Israelites across the Jordan into the Promised Land, but that Joshua would.⁵⁴ In humility, Moses received the Lord’s instructions and obeyed by building up the future leader of Israel. Christopher Polski, an expert in pastoral transitions, notes that even though Joshua was to succeed Moses, God had ordained an extended period of time between the revelation of Joshua’s successorship and Moses’ disclosure of God’s ultimate plan for that succession to the people.⁵⁵

This informal transition period would prove to be vital to both. Moses would have time to pass on leadership knowledge to Joshua. NASA CKO Director Roger Forgren agrees with Polski that this knowledge transfer is critical to the future success of one’s successor.⁵⁶

Moses’ ability to act upon the Lord’s instruction with grace and diligence is rare yet critical in the transference of power. Noel Tichy, an expert on leadership transitions,

⁵³ Deuteronomy 3:27-28.

⁵⁴ Deuteronomy 3:23-26.

⁵⁵ Polski, “Transition from Founding Pastor to First Successor Pastor: Every Pastor Is an Interim Pastor.”

⁵⁶ Roger Forgren, “Succession Planning & Knowledge Transfer Presentation,” (presentation slides), Appel Knowledge Services, https://appel.nasa.gov/wp-content/uploads/2020/06/Succession_Planning_and_Knowledge_Transfer_Presentation.pdf.

agrees, noting that a person may have all the traits of a leader, but if he or she doesn't see to the development of new leaders, the organization won't be sustainable.⁵⁷ The Lord instilled that wisdom in Moses, and he humbly mentored his future successor.⁵⁸

God blessed Israel through a smooth leadership transition, providing Israel with leadership unity and missional continuity through Joshua's tenure. The transfer of institutional knowledge began years before, but his positional power and status were not transferred formally until the last days of Moses' life.⁵⁹ When Moses was 120 years old, he officially commissioned Joshua as God's chosen successor before all of Israel.⁶⁰

Moses: A Proactive Leader

Moses is a special character in God's redemptive history. His prominence in scripture is exceeded only by that of the Son of God. Theologian Richard Phillips says that Moses was the only Old Testament figure to fulfill the roles of apostle and high priest as Jesus did and more in the New Testament.⁶¹ Hebrews 3 records that the supremacy of Moses' life and teaching was exceeded only by the life and teaching of Jesus Christ. The author of Hebrews notes this, saying:

For Jesus has been counted worthy of more glory than Moses—as much more glory as the builder of a house has more honor than the house itself... Now Moses was faithful in all God's house as a servant, to testify to the things that were to be

⁵⁷ Noel Tichy, *The Leadership Engine*, 2nd ed. (New York, NY: HarperCollins Publishers, 2002), 30.

⁵⁸ Joshua 1:7.

⁵⁹ Deuteronomy 34:9.

⁶⁰ Deuteronomy 31:1-8.

⁶¹ Richard Phillips, *Hebrews*, Reformed Expository Commentary (Phillipsburg, NJ: P&R Publishing Company, 2006), 84.

spoken later, but Christ is faithful over God's house as a son. And we are his house, if indeed we hold fast our confidence and our boasting in our hope.⁶²

Further distinguishing Moses' unique stature is his appearance at Jesus' transfiguration in Matthew 17. On Mount Tabor, Moses and Elijah appear and are recorded talking with Jesus face-to-face as he is revealed in all of his glory to Peter, James, and John.⁶³ Professor and theologian Dan Doriani notes that Moses and Elijah's appearance represent the Law and Prophets bearing witness that Jesus is the true Messiah, the one who fulfills the Mosaic Law.⁶⁴

Moses' personal history in Exodus 2 and 3 continues to reveal God's miraculous call on his life. Destined for death after birth, Moses was saved by exile. As an infant, Moses was exiled to the river, where the Lord meticulously arranged for Pharaoh's daughter to find him.⁶⁵ She took pity on the Hebrew baby and raised him as her own in the Egyptian palace, until he came of age. In providence, Moses' own mother was called upon to nurse him, receiving wages for her maternal work,⁶⁶ a sweet kindness and vital connection granted to Moses and Jochebed.⁶⁷

After Moses had been instructed in Pharaoh's house for forty years, growing mighty in word and deed, Luke records Stephen reminding his accusers of Moses:

⁶² Hebrews 3:3-6.

⁶³ Matthew 17:2-3.

⁶⁴ Daniel Doriani, *Matthew*, vol. 2, Reformed Expository Commentary (Phillipsburg, NJ: P&R Publishing Company, 2008), 105.

⁶⁵ Exodus 2:5.

⁶⁶ Maxie Dunnam, *Exodus*, The Communicator's Commentary (Waco, TX: Word, 1987), 45.

⁶⁷ Exodus 6:20.

When he was forty years old, it came into Moses' heart to visit his brothers, the children of Israel. And seeing one of them being wronged, he defended the oppressed man and avenged him by striking down the Egyptian. He supposed that his brothers would understand that God was giving them salvation by his hand, but they did not understand.⁶⁸

Stephen, speaking to the High Priest and the Sanhedrin, shared that Moses had tried to save the Israelites by his own hand but failed, not because he was the wrong instrument but because it was the wrong time. Even though Moses was highly educated, politically powerful, and compassionately motivated to lead the people of God out of Egypt, God did not allow Moses to lead his people to freedom by his own strength. God developed his leadership using the humility gained through obscurity, trials, training, and suffering. After forty years shepherding Jethro's flocks in the wilderness of Midian, Moses received his call. Luke records Stephen's speech:

Now when forty years had passed, an angel appeared to him in the wilderness of Mount Sinai, in a flame of fire in a bush. When Moses saw it, he was amazed at the sight, and as he drew near to look, there came the voice of the Lord: "I am the God of your fathers, the God of Abraham and of Isaac and of Jacob... I have surely seen the affliction of my people who are in Egypt, and have heard their groaning, and I have come down to deliver them. And now come, I will send you to Egypt."⁶⁹

Theologian Dennis Johnson explains, in his commentary on Acts, that Moses was commissioned by God to free and lead the Hebrew people but not until the age of 80.⁷⁰ Business and leadership professor Hershey Friedman explains that this waiting period was required because "leadership is about communicating a vision," and Moses had not

⁶⁸ Acts 7:23-25.

⁶⁹ Acts 7:30-32, 34.

⁷⁰ Dennis Johnson, *The Message of Acts* (Phillipsburg, NJ: P&R Publishing Company, 1997), 93-94.

received the needed revelation until his burning bush experience.⁷¹ God provided Moses his leadership vision in that moment:

I have indeed seen the misery of my people in Egypt... So, I have come down to rescue them from the hand of the Egyptians and to bring them out of that land into a good and spacious land, a land flowing with milk and honey. So now, go. I am sending you to Pharaoh to bring my people the Israelites out of Egypt.⁷²

Moses received God's vision at the burning bush with great reluctance, saying, "O Lord, please send someone else to do it."⁷³ Four times Moses challenged God's selection, which reflected Moses' lack of confidence in himself but also his lack of faith.⁷⁴

Friedman states that these two leadership traits would come to mark much of Moses' leadership, blessing and cursing Moses' tenure the next forty years. But Moses' greatest leadership failure wouldn't come until he struck the rock of Meribah twice, thirty-eight years later.⁷⁵

The result of Moses' lack of faith at Meribah barred him from entering Canaan, ending his time as Israel's leader. The Lord said to Moses and Aaron:

Because you did not trust in me enough to honor me as holy in the sight of the Israelites, you will not bring this community into the land I give them.⁷⁶

⁷¹ Hershey Friedman, "Even Great Leaders Make Mistakes: Learning Leadership from Moses" (Journal of Leadership and Management, New York, Baruch College Zicklin School of Business, 2019), <https://ssrn.com/abstract=3338569>.

⁷² Exodus 3:7-10.

⁷³ Exodus 4:13.

⁷⁴ Exodus 3:11-4:13.

⁷⁵ Friedman, "Even Great Leaders Make Mistakes: Learning Leadership from Moses."

⁷⁶ Numbers 20:12.

Moses' public sin at Meribah and old age set the context for a leadership transfer, and so the Lord reassured Moses of his covenant promise to Abraham, saying:

This is the land of which I swore to Abraham, to Isaac, and to Jacob, "I will give it to your offspring." I have let you see it with your eyes, but you shall not go over there. So Moses the servant of the Lord died there in the land of Moab, according to the word of the Lord.⁷⁷

God's promise to free Israel from Egyptian slavery and bondage and to provide them with a land flowing with milk and honey had been partially fulfilled under Moses' leadership.⁷⁸ This partial fulfillment necessitated covenantal continuity as they reached the Jordan River.⁷⁹

In God's omniscience, he prepared Joshua to continue his covenantal plan of redemption. Moses' protégé would lead the people of God across the Jordan into Canaan, and then Joshua actualized God's covenantal promise through military expansion. He led God-ordained battles and conquered many lands, including thirty-one kings.⁸⁰

Moses' behavior as a leader, listening to Jethro's counsel, delegating power to seventy elders,⁸¹ praying to God for a successor,⁸² as well as selecting and empowering young leaders like Caleb and Joshua, revealed his wisdom, foresight, and proactive approach to leadership. His leadership approach, seeking wisdom from God, tribal elders,

⁷⁷ Deuteronomy 34:4-5.

⁷⁸ Deuteronomy 34:4.

⁷⁹ Craigie, *The Book of Deuteronomy*, 367-369.

⁸⁰ Joshua 12:7-24.

⁸¹ Exodus 18:17-23.

⁸² Numbers 25:15-17.

and intentionally developing the next generation of Israelite leadership, yielded positive results, so much so that the scriptures say of Moses:

And there has not arisen a prophet since in Israel like Moses, whom the Lord knew face to face, none like him for all the signs and the wonders that the Lord sent him to do in the land of Egypt, to Pharaoh and to all his servants and to all his land, and for all the mighty power and all the great deeds of terror that Moses did in the sight of all Israel.⁸³

The Lord then brought Moses up the mountain of Abarim.⁸⁴ On the mountain, the Lord instructed Moses to make Joshua his successor and lead Israel to the Promised Land.⁸⁵

The Lord said to Moses, “Take Joshua the son of Nun, a man in whom the Spirit is, and lay your hand on him. Make him stand before Eleazar the priest and all the congregation, and you shall commission him in their sight. You shall invest him with some of your authority, that all the congregation of the people of Israel may obey.”⁸⁶

Moses did exactly as the Lord instructed and took Joshua before Eleazar the priest, and all of Israel, laying his hands on him and commissioned him as the Lord directed, saying:⁸⁷

Be strong and courageous, for you shall go with this people into the land that the Lord has sworn to their fathers to give them, and you shall put them in possession of it.

⁸³ Deuteronomy 34:10-12.

⁸⁴ Numbers 27:12.

⁸⁵ Jerusha Drummond, “Leadership Formation Through Mentoring in the Old Testament,” *Journal of Biblical Perspectives in Leadership* 9, no. 1 (2019), <https://www.regent.edu/journal/journal-of-biblical-perspectives-in-leadership/moses-and-joshua-relationship-leadership-formation-through-mentoring-in-the-old-testament/>.

⁸⁶ Numbers 27:18-20.

⁸⁷ Numbers 27:22-23.

A short time after Joshua's commissioning service, Moses died.⁸⁸ The book of Deuteronomy reveals that the people of Israel were not thrown into disarray or turmoil, losing their senior leader, but instead obeyed Joshua as the Lord had commanded.⁸⁹ A successful succession ensured the continuity of the God's mission under the tenure of Joshua's leadership.

Joshua: The Benefactor of a Planned Succession

The death of Moses marked the beginning of Joshua's command over Israel. The author of the book of Joshua begins his historical record by sharing Moses' charge to Joshua. The charge was a reminder to be strong and courageous as a leader and to never to forget the Book of the Law. Moses had said in his charge that the key to his success would be his obedience to God's law.⁹⁰ Theologian Gordan Wenham further states that the law of God was to be on Joshua's lips day and night as Israel's senior leader.⁹¹

Joshua was blessed because of his covenant faithfulness to God's law and the regular instruction that he received from Moses. Moses spoke to him not only about matters of theology and polity but also military strategy. He worked closely with Moses, observed Moses' life, and was given action learning assignments, proving his leadership capabilities prior to his transition.⁹² An example of one of his assignments can be found

⁸⁸ Deuteronomy 34:7.

⁸⁹ Deuteronomy 34:9.

⁹⁰ Joshua 1:6-9.

⁹¹ Gordan Wenham, *Book of Joshua: The Deuteronomic Theology of the Book of Joshua* (Oxford, England, 1971), 43.

⁹² Numbers 13:8, 16-20.

in Exodus 17. Moses is recorded telling Joshua, “Choose some men to go out and fight the army of Amalek for us.”⁹³

Joshua obeyed his mentor’s command and led the Israelite army into battle, while Moses requested the Lord’s help. As long as Moses’ arms were held high by Aaron and Hur, Joshua and Israel prevailed.⁹⁴ After the victory, the Lord commanded Moses to write down what had happened and to recite it in the ears of Joshua.⁹⁵

Pastoral transition scholar Larry Gilpin notes that one of the keys to Joshua’s transition success was intentional training from his mentor. Joshua directly benefited from Moses’ knowledge transfers and proximity to God’s anointed leader.⁹⁶

The long-term experiential learning that Joshua gained working alongside Moses pre-commission reduced the friction of his transition. Relational trust had been established personally and publicly between Moses and Joshua, empowering Joshua’s relationship with Israel.⁹⁷ Succession authors Peter Greer and Doug Fagerstrom agree with Gilpin’s assessment that one of the keys to a successful succession is the transference of trust privately and publicly. They explain that the more public the figure, the more public or formal the transfer of trust ought to be.⁹⁸

⁹³ Exodus 17:9.

⁹⁴ Exodus 17:11.

⁹⁵ Exodus 17:14.

⁹⁶ Gilpin, *When Your Long-Term Pastor Leaves Your Church*, 30.

⁹⁷ Gilpin, *When Your Long-Term Pastor Leaves Your Church*, 30.

⁹⁸ Greer and Fagerstrom, *Succession*, 144.

Joshua was fortunate that the Lord had instructed Moses to make his commissioning service public. The public service afforded Israel an inside look at the relational trust between Moses and Joshua, as well as the formal transfer of power between a mentor and mentee. Academic authors M. Poorthuis and J. Schwartz express note an additional benefit: the transfer of power remained clean and bloodless, not common at the time.⁹⁹

Another aspect that led to the success of Joshua's succession was his faithfulness to continue the work Moses had begun. Weese and Crabree note that the role of a new leader is to discover how he can complete the work of a previous leader or take it to a higher level.¹⁰⁰ They note that the continuation of this labor shows honor, respect, and value for what has preceded their tenure.¹⁰¹ Under Moses' leadership, the journey to the Promised Land remained incomplete, but under Joshua's leadership, this journey was completed. Israel crossed the Jordan River and took possession of the land.¹⁰²

Moses' success was unparalleled in the Old Testament, and the favor of God continued to rest upon Israel through Joshua's leadership. Unfortunately, that same level of leadership success and missional continuity disintegrated after Joshua's death. Joshua failed to replicate Moses' proactive approach to leadership, training young men, praying

⁹⁹ J. Schwartz and M. Poorthuis, *Saints and Role Models in Judaism and Christianity: Divine Versus Human Leadership, An Examination of Joshua's Succession*, vol. 7 (Boston, MA: Brill Academic Press, n.d.), 26.

¹⁰⁰ Weese and Crabtree, *The Elephant in the Boardroom*, 6.

¹⁰¹ Weese and Crabtree, *The Elephant in the Boardroom*, 7.

¹⁰² Joshua 23:1-10.

for a future successor, and intentionally building up a future successor, which led Israel into successive cycles of leadership failures, recorded in detail in the book of Judges.¹⁰³

Author and senior pastor Eric Geiger observes that Joshua's tenure ended very differently than Moses, and the people of God suffered as a result. He explains that leaders who do not develop future leaders are either short-sighted or selfish because the lack of intentionality always hurts those left behind.¹⁰⁴ The lack of data in scripture regarding Joshua's leadership develop plan is evidenced in Judges 2:7-10:

And the people served the Lord all the days of Joshua, and all the days of the elders who outlived Joshua, who had seen all the great work that the Lord had done for Israel... And there arose another generation after them who did not know the Lord or the word that he had done for Israel.¹⁰⁵

Old Testament biblical commentator Dale Ralph Davis believes the consequences of failing to prepare the next generation for leadership to be catastrophic.¹⁰⁶ He notes that Judges narrates the faithfulness of God and the repercussions of Israel's cyclical failure to develop godly leaders. Family Business experts Josh Baron and Rob Lachenauer agree with Davis that this type of leadership failure haunts future generations. They state that to navigate any significant transition requires a continuity plan and a clear successor to build a bridge between successive generations.¹⁰⁷

¹⁰³ Judges 2:6-3:6.

¹⁰⁴ Eric Geiger, "Lessons from Moses Equipping Joshua," *Christian Leadership Alliance* (blog), August 10, 2015, <https://christianleadershipalliance.org/blog/2015/08/10/moses-equipping-joshua-eric-geiger/#/program/e0610f3c5a66d2aceff81924becccd70>.

¹⁰⁵ Judges 2:7, 10.

¹⁰⁶ Dale Ralph Davis, *Judges: Such A Great Salvation*, Focus on the Bible Commentary Series (Great Britain: Christian Focus Publications, 2000), 34.

¹⁰⁷ Baron and Lachenauer, *Harvard Business Review Family Business Handbook*, 98.

Joshua unfortunately did not replicate what he experienced with Moses. After Joshua's death, Israel drifted from the Lord and lived in chaos.¹⁰⁸ The author of Judges, looking back on Joshua's death, describes the next generation as a people who did not know the Lord. The results of their disobedience led to generations of apostasy.

Biblical Succession: Paul to Timothy

The Bible references many leadership transitions between the time of Joshua and the Apostle Paul, but many either failed or lack significant documentation. To discover best succession practices, data-rich examples like Paul's transition to Timothy are key.

The literature documenting the life and leadership of Paul is extensive, making his leadership transition data rich. Luke's record of Paul's missionary journeys in Acts and Paul's letters to Timothy recount Paul's intentional effort to mentor and develop Timothy as a successor.¹⁰⁹ Other Pauline letters also provide glimpses into Paul's proactive approach to develop Timothy.

The leadership transition from Paul to Timothy, when compared to Moses' and Joshua's transition, provides a rich analysis of commonalities. While differences exist, they are minor. One distinction would be Moses' and Joshua's transference of power, which was spiritual and civil in nature, whereas the scriptures record Paul's transference to Timothy as spiritual only.

First, Paul's pedigree and training will be examined. Second, Paul's intentional mentorship of Timothy will be explored and compared to Moses' mentorship of Joshua.

¹⁰⁸ Geiger, "Lessons From Moses Equipping Joshua."

¹⁰⁹ Hoehl, "The Mentor Relationship."

Then a few similarities between Paul's and Moses' lives, successor development methodology, and farewell speeches will be examined in summation.

Paul: A Proactive Leader

The Apostle Paul is one of the most documented and celebrated leaders in scripture.¹¹⁰ Leadership expert Mark Green notes that while leadership in the first century was often tied to social status or political position, Paul's impact on Roman, Greek, and Jewish culture broke through all their cultural conventions. He suggests a better definition of leader would be "one who can influence, motivate, and enable others to contribute toward the effectiveness of their organization,"¹¹¹ a definition Paul embodied.

While Paul's childhood is not as documented as Moses', he writes that he was a Jew, was born in a Hellenistic city, Tarsus.¹¹² Tarsus was a free city, a cultural and intellectual center in the Roman empire. The city contained several schools dedicated to rhetoric and philosophy.¹¹³ It is likely that Paul attended one of these schools, given his passion for rhetoric and his use of quotations from Menander and Aratus.¹¹⁴

Pauline scholar Rudolf Knopf writes that growing up in Tarsus afforded Paul a distinct advantage later in life, for he was able to navigate two adversarial cultures.

¹¹⁰ Mark Green et al., "Assessing the Leadership Style of Paul and Cultural Congruence of the Christian Community at Corinth Using Project Globe Constructs," *Journal of Biblical Perspectives in Leadership* 2 (2009), https://www.regent.edu/acad/global/publications/jbpl/vol2no2/Green_etal_JBPLV2N2_final.pdf.

¹¹¹ Green et al, "Assessing the Leadership Style of Paul and Cultural Congruence of the Christian Community at Corinth Using Project Globe Constructs."

¹¹² Acts 9:11.

¹¹³ Richard Pratt, "Pauline Studies: Tarsus," *Thirdmill* (blog), 2011, <https://thirdmill.org/paul/tarsus.asp>.

¹¹⁴ Matt Slick, "Did Paul Quote Pagan Philosophers?," *Christian Apologetics and Research Ministry* (blog), 2016, <https://carm.org/defending-the-faith/did-paul-quote-pagan-philosophers/>.

Similar to Moses' origin story, Paul grew up in a Hellenistic culture yet maintained his Jewish heritage, so he could navigate both.¹¹⁵ Paul admits this advantage during a speech to a Jewish crowd and a Roman tribune.¹¹⁶ Speaking to the mixed audience, Paul said:

I am a Jew, born in Tarsus of Cilicia, but brought up in this city, educated under Gamaliel and was thoroughly trained in the law of our ancestors, being zealous for God as all of you are this day.¹¹⁷

In his speech, Paul confirms the city of his birth and his formal training under Gamaliel the Elder, grandson of Hillel. Pauline professors Bruce Chilton and Jacob Neusner explain that Paul would have received a first-rate education from Gamaliel, since the Talmud depicts Gamaliel as a brilliant and highly respected Pharisee. He was honored by all the Sanhedrin and given the title of *Nasi*, or “prince” in Hebrew.¹¹⁸

Author and professor David Friedman describes Gamaliel as a doctor of Jewish law, president of the Great Sanhedrin, and an exceptional teacher, which the Apostle Paul would have greatly benefited from.¹¹⁹ For Paul, his association with Gamaliel would have granted him an elevated status among his peers. Jewish scholars Solomon Schechter and Wilhelm Bacher comment that being mentored by Gamaliel, whom the Mishnah claims was one of the greatest teachers in all of Judaism, would have set any man apart.¹²⁰

¹¹⁵ Rudolf Knopf, “Paul and Hellenism,” *The American Journal of Theology* 18, no. 4 (1914), <https://www.journals.uchicago.edu/doi/pdf/10.1086/479456>.

¹¹⁶ Acts 21:40-22:21.

¹¹⁷ Acts 22:3.

¹¹⁸ Bruce Chilton and Jacob Neusner, “Bulletin for Biblical Research: Paul and Gamaliel,” *Penn State University Press* 14, no. 1 (2004), <https://www.jstor.org/stable/26422691>.

¹¹⁹ David Friedman, *At the Feet of Rabbi Gamaliel* (Messianic Jewish Publishers, 2013), 20.

¹²⁰ Solomon Schechter and Wilhelm Bacher, “Gamaliel,” in *Jewish Encyclopedia* (The Kopelman Foundation, 1906), <https://www.jewishencyclopedia.com/articles/6494-gamaliel-i>.

The Apostle Paul himself wrote of his pedigree to the church of Philippi:

If someone else thinks they have reasons to put confidence in the flesh, I have more: circumcised on the eighth day, of the people of Israel, of the tribe of Benjamin, a Hebrew of Hebrews; in regard to the law, a Pharisee; as for zeal, persecuting the church; as for righteousness based on the law, faultless.¹²¹

Equipped with passion, a pedigree, and an experience with the risen Christ,¹²²

Paul had a firm foundation in the law, the gospel, and leadership, making him an ideal mentor for Timothy.¹²³ It is likely Paul's experience, under Gamaliel's tutelage, shaped how he mentored Timothy. Mentoring experts Vineet Chopra and Sanjay Saint state that a mentor cannot give what he has not first received. They explain that all good mentors have first been mentored themselves, experiencing the benefit of the mentor-mentee relationship.¹²⁴ The New Testament doesn't provide evidence of the specific methodology Gamaliel used with Paul, but it is likely that Paul's capacity to mentor Timothy was shaped by what he had experienced himself as a Pharisee.

Transition expert Stacy Hoehl observes that Paul recognized the importance of replicating what he had received earlier in his religious career, so he proactively chose Timothy.¹²⁵ Mentorship experts Chopra and Saint note that choosing the right candidate is not easy. They emphasize that a successful mentorship relationship requires a teachable

¹²¹ Philippians 3:4-6.

¹²² Acts 9:1-19.

¹²³ Hoehl, "The Mentor Relationship."

¹²⁴ Vineet Chopra and Sanjay Saint, "6 Things Every Mentor Should Do," *Harvard Business Review* (blog), March 29, 2017, <https://hbr.org/2017/03/6-things-every-mentor-should-do>.

¹²⁵ Hoehl, "The Mentor Relationship."

candidate who is curious, engaged, responsible, well-thought of, and willing to be challenged to be great.¹²⁶

The gospel writer Luke records in Acts that Timothy was a young man with these qualities. He states that Paul had heard from faithful brothers in Lystra and Iconium of Timothy, so on Paul's second missionary journey, he visited Timothy to see for himself what kind of man he was.¹²⁷ After Paul met him, Luke notes, Paul wanted him to accompany Silas and himself to strengthen previously established churches.¹²⁸

Acts 16:1-3 records that Paul began Timothy's training at once. Timothy's first action learning assignment was costly: circumcision. The challenge, as painful as it was, would give Timothy more credibility before the wider audiences that Paul and Timothy would engage. According to New Testament commentator Derek Thomas, the reasoning for Timothy's circumcision lies in Paul's understanding of *adiaphora*. He states that Paul knows that Timothy was not required to be circumcised or remain uncircumcised. Rather, Thomas notes, the decision was a proactive response to the leadership required in Jewish settings.¹²⁹ Timothy's lineage was a considerable obstacle for cross-cultural work. His mother, Eunice, was Jewish, but his father was Greek, a point of contention for zealous Jews.¹³⁰

¹²⁶ Chopra and Saint, "6 Things Every Mentor Should Do."

¹²⁷ Theopulos, "Paul and Timothy," Fuller Seminary Staff Article, n.d., <https://www.fuller.edu/next-faithful-step/resources/paul-and-timothy/>.

¹²⁸ Acts 16:1-5.

¹²⁹ Derek Thomas, *Acts*, Reformed Expository Commentary (P&R Publishing Company, 2011), 452.

¹³⁰ 2 Timothy 1:5.

In an earlier letter to the Galatian church, Paul refutes the need for any Gentile to be circumcised to be a faithful follower of Jesus Christ,¹³¹ but Timothy was gifted for more costly service, and Paul, desiring for Timothy's unhindered leadership in all contexts, lay his first leadership challenge before him. Hoehl comments that Paul's action, circumcising Timothy, seems to contradict his statements in Galatians 2:3-4 but confirms the need to eliminate any restriction on reaching a wider ministerial audience. In preparing Timothy for life-long ministry, Paul made sure that his protege was equipped for the task.¹³²

In 1 Corinthians 9:19, Paul explains this leadership quality, stating:

Though I am free and belong to no man, I make myself a slave to everyone, to win as many as possible. To the Jews I became like a Jew, to win the Jews.¹³³

Executive Coach Andrew Neitlich shares that the one of the most important factors of successful coaching relationships is the ability of the coach to challenge others in a positive and psychologically safe environment. Neitlich observes that a great coaching relationship is characterized by the willingness to receive challenge as personal investment and not an attack on their character or competence.¹³⁴ Author and ICF certified coach, Keith Webb, agrees with Neitlich, that leadership soft skills are vital to

¹³¹ Galatians 5:2.

¹³² Hoehl, "The Mentor Relationship."

¹³³ 1 Corinthians 9:19.

¹³⁴ Andrew Neitlich, *Coach!*, 1st ed. (Sarasota, Florida: Center for Executive Coaching, 2016), 78.

issuing a positive challenge in the right way and for the right reason to effect the desired developmental growth.¹³⁵

Luke records the result of Paul's challenge and Timothy's acceptance but not Paul's specific leadership approach. Luke does say, however, that Timothy's willingness to be circumcised led to churches growing in number and maturity.¹³⁶ The Lord blessed Paul's leadership and Timothy's willingness to suffer to the sake of reaching the lost.

Paul recognized Timothy's leadership potential and continued to challenge him with development assignments. In Acts 17:14, Paul separated from Timothy and Silas and told them to meet him in Athens. In the meantime, Timothy and Silas were to nurture the young congregation established in Berea. They were to minister there until they found safe passage to Athens.¹³⁷ Luke records in Acts 19:22 that Paul wished to visit Macedonia and Achaia, where he had previously sent Timothy and Erastus to minister.

Details of the Timothy's ministry activities in Macedonia are not recorded in the book of Acts, but Tichy notes how providing such action learning assignments is valuable in developing successors. He says that successors must be thoroughly challenged with observable goals and objectives. Designing action learning assignments with real-time business challenges, concepts, tactics, and strategies is vital to assessing candidates' character, creativity, and resolve. He notes that the success or failure of the assignment be weighed for or against a candidate's profile.¹³⁸

¹³⁵ Keith Webb, *The COACH Model: For Christian Leaders*, 2nd ed. (New York, NY: Morgan James Publishing, 2019), 133.

¹³⁶ Acts 16:5.

¹³⁷ Thomas, *Acts*, 133.

¹³⁸ Tichy, *Succession: Mastering The Make or Break Process of Leadership Transition*, 67.

Timothy must have weathered Paul's action learning assignments well during his time apart from Paul, because Paul, in his letter to the church in Philippi, states:

I hope in the Lord Jesus to send Timothy to you soon, so that I too may be cheered by news of you. For I have no one like him, who will be genuinely concerned for your welfare. For they all seek their own interests, not those of Jesus Christ. But you know Timothy's proven worth, how as a son with a father he has served with me in the gospel. I hope therefore to send him just as soon as I see how it will go with me.¹³⁹

Paul affirms Timothy's character and value to the Philippian church. He also goes out of his way to reference how dear his relationship with Timothy is. Dennis Johnson, professor and biblical commentator, explains that these powerful endorsements for Timothy provide critical insight into Paul's personal assessment of and affection for Timothy.¹⁴⁰ Mentoring expert Anthony Tjan agrees with Johnson, in that public statements, like the one that Paul made about Timothy, are deeply effective, for the mentee and the organization. Tjan observes that the best mentors go beyond simple upskilling and check-the-box procedures and put their relationship with their mentee above their organizational objectives. Mentoring relationships that make the greatest long-term impact on an organization have a base-line chemistry to them.¹⁴¹

The vote of confidence that Paul gave Timothy would have enriched his relationship with him and also empowered Timothy's status in that church. Whether Paul was thinking of his succession in that moment or not, his public profession of Timothy's

¹³⁹ Philippians 2:19-23.

¹⁴⁰ Dennis Johnson, *Philippians*, Reformed Expository Commentary (Phillipsburg, NJ: P&R Publishing Company, 2013), 170.

¹⁴¹ Anthony K. Tjan, "Career Coaching: What the Best Mentors Do," *Harvard Business Review* (blog), February 27, 2017, <https://hbr.org/2017/02/what-the-best-mentors-do>.

competency was key in building relationship capital with his audience. Weese and Crabtree explain the vital importance of public proclamations like this. They say that leaders reduce friction and grease the wheels of the transition process by simply honoring their successor when they speak publicly or privately about them. They conclude that positive statements about a successor integrate the past and the present, building an invisible bridge between tenures.¹⁴²

It is likely that succession was not on the forefront of Paul's mind when he first began his Christ-centered ministry, but as he aged, matured, and became intimately acquainted with death, his leadership priorities changed. He had many travel companions, including Silas, Barnabus, John Mark, Apollos, Titus, and Onesimus to name a few, but Timothy stood out. Hoehl comments that as Paul gained confidence in Timothy's competence, he employed him in tougher assignments. One of the most challenging ministerial environments for Timothy was the church in Ephesus. Paul had spent a great deal of time ministering there and was now concerned about the spread of false doctrines among its members. After hearing about the deteriorating condition at Ephesus, Paul commissioned Timothy to counter their errors, correct the congregation's methods of interpretation, and return the church to the true gospel.¹⁴³

Paul gave Timothy clear instructions concerning the management of heresy. He reminded Timothy of his obligation to the true gospel, stating:

¹⁴² Weese and Crabtree, *The Elephant in the Boardroom*, 34.

¹⁴³ Hoehl, "The Mentor Relationship."

This charge I entrust to you, Timothy, my child, in accordance with the prophecies previously made about you, that by them you may wage the good warfare, holding faith and a good conscience.¹⁴⁴

Author and theologian John Stott says that Paul is likely calling Timothy to remember his ordination by charging him to maintain the purity of the gospel. Paul uses militaristic language like *parangelia* in his instructions, but spiritual warfare, not physical warfare, is in view. Stott comments that Paul is commanding Timothy to use the sword of the Spirit, which is the Word of God, and not an actual sword to fight the good fight.¹⁴⁵

Paul, like Moses, equates his missional work to warfare against idolatry and false teaching. But the main distinction between Paul's charge to Timothy and Moses' charge to Joshua is that Joshua's charge was both military and spiritual in nature,¹⁴⁶ whereas, Timothy's was purely spiritual or doctrinal.¹⁴⁷

In Deuteronomy 31, Moses charges Joshua with the task of military warfare, dispossessing the Canaanites from their land, but Paul, in both of his letters to Timothy, charges him to wage spiritual warfare against false teaching that strikes at the vitals of the faith. In Paul's second letter to Timothy, he tasks him with the responsibility to:

Preach the word, be ready in season and out of season; reprove, rebuke, and exhort, with complete patience and teaching.¹⁴⁸

¹⁴⁴ 1 Timothy 1:18.

¹⁴⁵ John Stott, *The Message of 1 Timothy & Titus*, The Bible Speaks Today (Leicester, England: InterVarsity Press, 1996), 43.

¹⁴⁶ Deuteronomy 31:1-8.

¹⁴⁷ 2 Timothy 4:1-8.

¹⁴⁸ 2 Timothy 4:2.

Paul, as mentor, gave his protégé the proper strategy to fight the good fight. He gave specific instructions on how to be a faithful leader to God’s unfaithful people in idolatrous times. Pastor and Ph.D. student Jeff Medders outlines the importance of those instructions, saying that Timothy would face hostile audiences, like Paul, thus making his instructions invaluable guides for navigating the doctrinal chaos of the early church. Additionally, he adds that the most valuable instruction that Timothy received from Paul was neither written nor spoken but observed in Paul’s life.¹⁴⁹

Timothy, like Joshua, had the privilege of watching and observing his mentor’s way of life. Drummond says that in the Old and New Testaments, the word “mentoring” isn’t mentioned, but the concept of relational mentoring is prevalent.¹⁵⁰ Hoehl agrees with Drummond’s assessment that relational mentoring is not only the predominant method of mentoring in scripture but also the most effective.¹⁵¹

Leadership development expert Russ Moxley agrees that the experiential mentorship model is powerful in succession training, but he also shares that another developmental method supersedes all others. He emphasizes that personal hardships are more important to the development of well-rounded leaders than training, coaches, mentors, or challenges. Moxely sees hardships as unplanned opportunities for deep

¹⁴⁹ Jeff Medders, “8 Lessons Paul’s Residency Program,” *Acts 29* (blog), August 9, 2021, <https://www.acts29.com/8-lessons-from-pauls-residency-program-part-3/>.

¹⁵⁰ Drummond, “Leadership Formation Through Mentoring in the Old Testament.”

¹⁵¹ Hoehl, “The Mentor Relationship.”

growth, resilience, and character formation.¹⁵² Following in Paul's footsteps, Timothy would have experienced both in preaching and teaching the gospel in the first century.

Paul was regularly acquainted with hardships, being blinded by the risen Christ, shipwrecked, stoned, beaten, betrayed, mocked, imprisoned, stalked, and hunted. Timothy, laboring alongside Paul during his third missionary journey, would not only have witnessed these hardships but would also have faced some of them himself. The scriptures do not record the details of Timothy's ministerial hardships traveling with Paul, but Timothy would have witnessed crowds mocking, spitting, ignoring, stalking, and seeking to imprison Paul. Paul intimately understood the future hardships Timothy would face, saying to his protege:

Do not be ashamed of the testimony about our Lord, nor of me his prisoner, but share in suffering for the gospel by the power of God.¹⁵³ Share in suffering as a good soldier of Christ Jesus.¹⁵⁴

Moxley says that suffering hardships provides a different kind of developmental experience because hardships are not planned or easily controlled.¹⁵⁵ Hoehl agrees, stating that one of Paul's objectives was to motivate Timothy to endure the necessary hardships when bearing witness to the name of Christ. She notes that in Paul's letters to Timothy, Paul openly shared difficult truths with Timothy, yet he often paired those truths with gentle reminders of his eternal reward in Christ. Paul would remind Timothy

¹⁵² Cynthia McCauley, Russ Moxley, and Ellen Van Velsor, *The Center for Creative Leadership: Handbook of Leadership Development* (San Francisco, CA: Jossey-Bass, 1998), 197.

¹⁵³ 2 Timothy 1:8.

¹⁵⁴ 2 Timothy 2:3.

¹⁵⁵ McCauley, Moxley, and Velsor, *The Center for Creative Leadership*, 196.

of God’s fulfilled promises, present work, and future promises, to comfort him through the sovereignty of God.¹⁵⁶ Moxley observes that this kind of honest and supportive environment is critical for a transformative leadership development experience.¹⁵⁷ The Apostle Paul understood this principle, balancing the sharing of truth in love, while actively modeling it in his own relationship with Christ.

Timothy: The Benefactor of a Mentored Relationship

Paul instructed and developed Timothy as a leader, to teach the gospel of Jesus Christ so that he would replicate what he had seen and heard.¹⁵⁸ The Apostle Paul knew his time was drawing to an end, and therefore, wrote his farewell letter to Timothy,¹⁵⁹ providing detailed instructions on what to teach and how to lead in his absence.¹⁶⁰

Hoehl observes that Timothy was blessed to have been trained by Paul and to have had his public blessing as his successor. Paul made it clear in his farewell letter that Timothy was to continue what he had begun. Paul said:

What you have heard from me through many witnesses, entrust to faithful people who will be able to teach others as well.¹⁶¹

In this sense, Timothy is clearly an inheritor of Paul’s mantle, as a teacher and as a leader to Christian leaders. On the other hand, Hoehl mentions, Paul does not ask

¹⁵⁶ Hoehl, “The Mentor Relationship.”

¹⁵⁷ McCauley, Moxley, and Velsor, *The Center for Creative Leadership*, 201.

¹⁵⁸ 1 Timothy 4:11-16.

¹⁵⁹ 2 Timothy.

¹⁶⁰ 1 Timothy 5:9-16.

¹⁶¹ 2 Timothy 2:2.

Timothy to take up Paul's apostolic office.¹⁶² Nowhere in the scripture does Paul refer to Timothy as the next apostolic heir.¹⁶³ This distinction is critical because it separates the Catholic and Protestant view of apostolic succession. Paul tells Timothy to follow the pattern of the sound words he has heard from him,¹⁶⁴ but he does not command him to travel to Spain in his place or to carry on his calling to reach the Gentiles.

Biblical commentator William Mounce agrees with Hoehl that Paul is only charging Timothy to preserve the reliability of the gospel. He notes there is no chain of apostolic succession constructed from Paul's letter to Timothy in a formal sense. Informally, however, he says, the succession of entrusting the gospel and church leadership to qualified believers is being promulgated.¹⁶⁵

Hoehl notes that what Paul saw in Timothy is what pastors today need to look for in their potential successors. She notes that Timothy was a young, faithful, and teachable man, in whom the Spirit of God was working. She says that Paul recognized his potential, tested it, and spent time developing it. Furthermore, she notes that Paul understood the importance of equipping a successor to carry on the gospel message after his life and ministry were over so that church leadership structures would continue. To leave his earthly ministry without establishing a means for its continuation would have contradicted his overarching message to Timothy. Paul clearly charges Timothy to preach the Word and to discharge all the duties of his ministry faithfully until his end, reminding

¹⁶² Hoehl, "The Mentor Relationship."

¹⁶³ "Paul and Timothy."

¹⁶⁴ 2 Timothy 1:13.

¹⁶⁵ William Mounce, *Pastoral Epistles*, vol. 46, Word Biblical Commentary (Nashville: Thomas Nelson, 2000), 165.

Timothy to lead as he did and to develop his own successor as he did.¹⁶⁶ Tichy agrees with Paul's approach to organizational continuity, saying that building an effective leadership pipeline is essential to the ongoing cultivation of any organization or non-profit. Continuity demands development.¹⁶⁷

Summary of the Biblical Framework for Succession Planning

Succession planning is not a product of modernity but rather a God-given process of transferring power, knowledge, and position from one leader to another.¹⁶⁸ It is an opportunity for faithful stewardship and humility, recognizing that the mission of God is bigger than any one leader's tenure. Moses and Paul recognized the grandeur of their God-ordained mission and faithfully prepared successors to carry the mission forward after their death. In Psalm 90, Moses prayed that the people of God might learn to number their days, so that they might gain a heart of wisdom, and carry God's eternal perspective of life with them.¹⁶⁹

The leadership tenures of Moses and Paul provide positive examples for biblical successions. While their tenures are separated by hundreds of years, there are many striking similarities worth noting. The most obvious is that as both matured as leaders, their actions became increasingly future-focused. Instructing the next generation of God's people took center stage, as God gave each of them their curtain call.

¹⁶⁶ Hoehl, "The Mentor Relationship."

¹⁶⁷ Tichy, *Succession*, 85.

¹⁶⁸ Vanderbloemen and Bird, *Next*, 10.

¹⁶⁹ Psalm 90:12.

Moses and Paul share Israelite ancestry, yet neither was born in Israel. Born a Levite, Moses was trained and educated in the Egyptian court for the first forty years of his life.¹⁷⁰ Paul, a Benjamite, was born in the Hellenistic city of Tarsus before being trained in the famed Jerusalem school of Gamaliel. Both men were foreign born and highly educated, which provided them an appreciation and understanding of Hebrew and Gentile cultures. God did not waste their education but employed it for holy use.

Table 1: Comparison of Paul and Moses' Life

<u>Events</u>	<u>Paul</u>	<u>Moses</u>
Nationality	Tribe of Benjamin, Roman Citizen	Tribe of Levi, Egyptian Prince
Birthplace	Tarsus	Egypt
Education	Gamaliel (President of Sanhedrin)	Egyptian Court
Personality	Zealous: Hunted Christians, Bold	Zealous: Killed Egyptian, Meek
Occupation	Pharisee, Tent Maker, Missionary	Prince, Shepherd, Leader
Writings	5 Books in the Old Testament	13 Letters in the New Testament
Commissioned	Road to Damascus	Burning Bush
Mission	Missionary to the Gentiles	Free & Lead Israelites
Leadership	Missionary to Gentiles	Leader of Israel
Death	Martyrdom, Age 56-60	Natural Causes, Age 120
Successor	Timothy	Joshua

As young men, Moses and Paul describe themselves as zealous in nature. In Exodus 2, Moses records himself killing an Egyptian man who was beating another Hebrew slave to free him from his bondage.¹⁷¹ Paul, in Philippians 3, notes that he was

¹⁷⁰ Exodus 2:1-10.

¹⁷¹ Exodus 2:12.

more zealous than his peers, being an active persecutor of the church.¹⁷² Paul's companion, Luke, even records evidence of Paul's pre-conversion zeal, noting his presence and encouragement of those who were stoning Stephen to death.¹⁷³

Another similarity that separates Paul and Moses from many leaders in scripture is their intention to instruct the people through their extensive writing. Both men set aside time to record significant events in the life of God's people so that future generations would recall God's truth and God's faithfulness. Paul wrote thirteen letters to the people of God that have been canonized in the New Testament, and Moses wrote most of the first five books of the Old Testament. Empowered by the Holy Spirit, both wrote what the Lord conveyed to them, to build the faith of God's people and their successors.

A critical similarity also lies in their personal encounters with God, who commissioned them to carry the name of the Lord forward in missional proclamation. Moses wrote in Exodus 3 about his experience with God, appearing as a theophany in the burning bush on Mount Horeb. Moses notes that the Lord spoke to him through the fire and commissioned him to tell Pharaoh of God's name and God's command to deliver his people out of slavery and bondage.¹⁷⁴ In Acts 9, Luke records that Paul was surrounded by a blinding light, hearing only the voice of the risen Lord saying to Ananias that this man was a chosen instrument of God to carry God's name before the Gentiles, kings, and the children of Israel.¹⁷⁵ In a similar fashion, Paul and Moses commission their

¹⁷² Philippians 3:6.

¹⁷³ Acts 7:58.

¹⁷⁴ Exodus 3:10.

¹⁷⁵ Acts 9:15.

successors to continue the mission of God in their absence, with one main difference.

Both leaders describe their successor's ministry as waging warfare, but Timothy's mission is spiritual in nature,¹⁷⁶ while Joshua's mission is both military and spiritual.¹⁷⁷

A key leadership development tool that the Lord used to mature Moses and Paul was personal hardship. Moxley says that well-rounded leaders significantly benefit from experiencing diverse challenges that reveal personal limits and deeper self-awareness.¹⁷⁸ The Lord sovereignly allowed Moses, a Hebrew prince of Egypt, to be exiled into the wilderness of Midian for forty years before using Moses in powerful ways at the age of 80.¹⁷⁹ Paul, previously a persecutor of God's people, experienced years of harsh persecution. He was whipped, beaten, stoned, shipwrecked, stalked, left for dead, cold, naked, hungry, imprisoned, and betrayed many times during his missionary journeys. Both men experienced deep hardships and therefore were acquainted with their limitations. Leadership author and pastor Pete Scazzero writes that leaders who understand their limits often emerge from their hardships with more emotional stability and purity of soul. He observes that as they are weathered into quiet and contemplative leaders, ego diminishes, enabling future focused actions to take center stage.¹⁸⁰

¹⁷⁶ 1 Timothy 1:18.

¹⁷⁷ Deuteronomy 31:3-6.

¹⁷⁸ McCauley, Moxley, and Velsor, *The Center for Creative Leadership*, 212.

¹⁷⁹ Exodus 2:15.

¹⁸⁰ Peter Scazzero, *The Emotionally Healthy Leader: How Transforming Your Inner Life Will Deeply Transform Your Church, Team, and the World* (Zondervan, 2015), 134.

Table 2: Farewell Discourses

<u>Common Elements</u>	<u>Paul</u>	<u>Moses</u>
1. Imminent Departure:	2 Timothy 4:6-7	Deuteronomy 31:1-2
2. Directives:		
a. Be Strong	2 Timothy 2:1	Deuteronomy 31:7
b. Laying on of Hands	2 Timothy 1:6	Deuteronomy 34:9
c. Conduct Holy Warfare	2 Timothy 2:3	Deuteronomy 31:3
d. Share God’s Word	2 Timothy 4:2	Deuteronomy 31:10-13
e. Guard God’s Word	2 Timothy 1:14	Deuteronomy 32:46-47
3. Post-Death Prediction of Rebellion	2 Timothy 3:1-5	Deuteronomy 31:29
4. Final Words		
a. God is With You	2 Timothy 1:14	Deuteronomy 31:8
b. Instructions	2 Timothy 4:9-22	Deuteronomy 33:1-29

Sensing the end their leadership tenure, Paul and Moses imparted lasting wisdom and final instructions to their successors. In Deuteronomy 31-34 and in 2 Timothy, Moses and Paul share their farewell discourse to their successors. Recording their parting instructions provides individual benefit and collective benefit for the people of God.

Both discourses share four common elements: (1) death is near, (2) ongoing ministerial work to carry out after their deaths, (3) the people of God will rebel against their leadership, and (4) the Lord will be with them as their leader. These elements cap their instruction to their successors and mark the last element of their succession process.

Key Elements in Succession Planning

The Society for Human Resource Management describes succession planning as “the future-focused practice of identifying the knowledge, skills, and abilities to perform certain functions, and then developing a plan to prepare a single or multiple individuals to

potentially perform those functions.”¹⁸¹ In the examination of succession literature, seven key elements surfaced. These seven elements describe the future-focused practices that successful organizations and churches engaged in during the succession process.

The elements discovered include key people in the succession planning process, a timeline, a successor profile, the need for an emergency succession plan, an internal leadership pipeline, a communication plan, and a public ceremony or celebration commemorating the outgoing leader and formalizing the transfer of power to the incoming leader. These core elements were discussed by transition and succession experts and were instrumental in the reduction of organizational anxiety, transitional friction between leaders, and enhanced the continuity of the transition. To discover common elements in successful successions, the researcher came across additional elements, but many of them were not practiced across entity types. Example of this are Noel Tichy’s addition of CHROs (Chief Human Resources Officers) and William Vanderbloemen’s addition of spouses. Both groups are significant in their own context but did not bear the same weight in all the succession contexts. The key people in all the entity types were the outgoing leader, board, and the transition consultant, as an objective third party.

Key People

Tichy, a student of Peter Drucker’s managerial and leadership principles, states that the development and selection of an organization’s next leader by the present

¹⁸¹ SHRM Staff, “Engaging in Succession Planning,” *The Society of Human Resources Management* (blog), 2023, <https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/engaginginsuccessionplanning.aspx>.

generation is the single most important decision any organization can make. He defines the “present generation of leaders” as most important in the succession process.¹⁸²

While the outgoing leader, the board of directors, and the transition consultant are key people, the assumed fourth key person in the success process is the succession candidate, but because of the uncertain outcome at the beginning, most experts did not include the final selection. In most cases, candidates were not notified of their status as candidates until the process was formalized between the board and the outgoing leader.

For most of the succession experts, the most significant person in the succession planning process was the outgoing leader. Weese and Crabtree observed in their research that the key player in any church succession was always the outgoing senior pastor due to his disproportionate power and relationship capital. They noted that the senior pastor position had the ability to gracefully stabilize the ship in transition or sink it quickly.¹⁸³ Vanderbloemen agrees with Weese and Crabtree, stating that senior pastors and elder boards are the central players in the succession process. He also admits that the senior pastor position has the unique ability to steer the direction of the board, making it even more vital to the process. He observes that elder boards offer ongoing stability, but senior pastors ought to own the process because in the end, the success of pastoral transitions rises and falls on the shoulders of the outgoing pastor.¹⁸⁴

The two succession experts who slightly disagree with Vanderbloemen, Weese, and Crabtree are Saporito and Winum. They state from their internal RHR research, 48

¹⁸² Tichy, *Succession*, 53.

¹⁸³ Weese and Crabtree, *The Elephant in the Boardroom*, 48.

¹⁸⁴ Vanderbloemen and Bird, *NEXT*, 57.

percent of the directors they interviewed mentioned the responsibility of the succession planning process belonged to the outgoing CEO, but that their personal conclusion was that the board of directors was the central group in the succession process. They noted their position was more significant than the outgoing leader's because they were the bridge between tenures.¹⁸⁵ The board, as they see it, acts as a safeguard for organizational continuity, protecting it from the possibility of being hamstrung by an outgoing CEO's last act, naming a clone, without consensus, as king. They state that such an act could unfairly restrict the direction of the organization and simply maintain the status quo.¹⁸⁶

Authors Peter Greer and Doug Fagerstrom note the vital role that boards play, stating that they are the guardians of an organization's mission, and therefore protect the organization from mission drift. They observe that leadership transitions are key moments when mission drift can occur and that the board must select a candidate who fits the culture, mission, vision, and values of the organization for sustained continuity.¹⁸⁷

Weese and Crabtree concur that the role of the board is second only to the outgoing leader in any succession. They agree with Greer and Fagerstrom that the board has the responsibility of overseeing and executing the strategic transition plan.¹⁸⁸

Saporito and Winum take a stronger stance, acknowledging that the board of directors must be fully involved in the transition process as the central player but also state that it

¹⁸⁵ Saporito and Winum, *Inside CEO Succession*, 80.

¹⁸⁶ Saporito and Winum, *Inside CEO Succession*, 73.

¹⁸⁷ Greer and Fagerstrom, *Succession*, 98.

¹⁸⁸ Weese and Crabtree, *The Elephant in the Boardroom*, 51.

is a best practice that one of one board members, with a great relationship with the CEO, drive the process.¹⁸⁹

The third instrumental person in succession planning is a transition or succession consultant. Michael Timms, a succession expert, notes that in larger organizations, hiring a transition consultant adds objectivity and specialized process knowledge. These people bring a deep understanding of the systemic impact that internal or external moves might have on the larger system. He observes that consultants and HR officers also act as guard rails for boards and CEOs who have closer emotional proximity to the transition.¹⁹⁰

Weese and Crabtree assent that the third key member of a succession team is a transition consultant. They say that regardless of an organization's governance structure, an objective third party is needed to help the outgoing leader and board dodge common pitfalls. Particularly in churches, which are highly emotional systems, they conclude that the transition process is too critical to the ongoing health of the organization to leave it up to well-intentioned volunteers. A third type of voice is needed to act as a resource to negotiate issues of confidentiality, control, or personal biases.¹⁹¹

Saporito and Winum, agree with Weese and Crabtree that a succession consultant is essential for a smooth succession process. They explain that in their internal research, consultants often offered out-of-the-box thinking, questions, suggestions, and support. They agree that their role, as a bridge between invested parties, is worth the expense.¹⁹²

¹⁸⁹ Saporito and Winum, *Inside CEO Succession*, 47.

¹⁹⁰ Michael Timms, *Succession Planning That Works* (Victoria, Canada: FriesenPress, 2016), 139.

¹⁹¹ Weese and Crabtree, *The Elephant in the Boardroom*, 152.

¹⁹² Saporito and Winum, *Inside CEO Succession*, 47.

Creating a Succession Timeline

Once an informal or formal succession team has been established, experts agree that one of the first orders of business ought to be creating a rough draft of the succession timeline. Vanderbloemen states that writing down action items, milestones, and transition dates provides clarity and alignment between the outgoing leader, board, consultant, and the stakeholders in the organization. He says that ambiguity often leads to confusion, and confusion leads to lost organizational momentum.¹⁹³

Another misstep to avoid is starting, planning, and executing a succession in less than a year. Vanderbloemen and Bird note that microwavable succession plans often lead to microwavable results, which they contrast with the exceptional results that come from slow-cooking, crockpot plans. They say that a successor must be accepted and incorporated into the church's culture to establish a solid foundation for effective leadership and ministry.¹⁹⁴ Bronner and Chand agree that a hastily planned succession can result in crowning an outsider hobbled by cultural or industry ignorance, or an insider who knows the business but can't lead.¹⁹⁵ They advise to avoid these missteps by creating a multi-year succession timeline.

Weese and Crabtree agree with Vanderbloemen, Bird, Bronner, and Chand's assessment about time and offer a further detail to consider. They say that the size of a church or an organization ought to impact the timeline of the planned succession because, as they observe, the larger the organization, the more complex the transition often is,

¹⁹³ William Vanderbloemen, "12 Things Failed Succession Have in Common," *Vanderbloemen* (blog), n.d., <https://www.vanderbloemen.com/blog/avoid-failed-successions>.

¹⁹⁴ Vanderbloemen, "12 Things Failed Succession Have in Common."

¹⁹⁵ Bronner and Chand, *Planning Your Succession*, 54.

requiring more time to plan a smooth succession. Larger organizations have more information embedded into them that must be articulated, disseminated, and proactively communicated to the incoming successor. Sizeable entities also often have more stakeholders, programs, and processes to take into consideration, adding complexity to the transfer process. They suggest the more lead time a successor has to on-ramp, and the outgoing leader has to off-ramp, the easier it will be for the organization and incoming leader to analyze, understand, and lead the organizational system.¹⁹⁶ Vanderbloemen says the only caveat to planning for a longer off-ramp for outgoing leaders of larger organizations is if leaders have been low-performers, outstaying their welcome. In those situations, he suggests establishing an abbreviated timeline to stop the bleeding.¹⁹⁷

When it comes to the duration or length of a succession timeline, the experts generally suggest at least two to three years from inception to formal transfer of power and position. Saporito and Winum, however, suggest for CEO successions, that the formal succession process start anywhere between three to ten years before the outgoing CEO passes the torch. They suggest that possible candidates be identified and hired into the organization's developmental program for observation and stretch assignments. Over the two to three years, the CEO and board evaluate and score their succession candidates, keeping track of their developmental progress. Within nine to twelve months of a succession hand-off, they state that the board should interview and vet all viable candidates to weed out misfit candidates. At the six-month mark, Saporito and Winum suggest that the board select a successor and announce their selection to the various levels

¹⁹⁶ Weese and Crabtree, *The Elephant in the Boardroom*, 142.

¹⁹⁷ Vanderbloemen and Bird, *Next*, 50.

of stakeholders and the press. The final three months of the outgoing CEO's tenure then parallels the incoming CEO's role change.¹⁹⁸

They suggest that a succession best practice is to work alongside the newly selected CEO, transferring knowledge, bridging key relationships, removing barriers, or completing previously unfinished tasks together, to create a cleaner slate for the new CEO. After the transition is completed, healthy ongoing leaders offer to keep an open line of communication with their predecessor, establishing a connection to the past, but also requesting insights into the future.¹⁹⁹

Bronner and Chand don't offer a specific timeframe like Saporito and Winum, but they suggest that one of the best ways a senior leader can set up his successor is by simply adhering to a definite departure date. Lingering beyond that specified date often causes confusion and complexity in an organizational system.²⁰⁰

Developing an Emergency Succession Plan

Another suggestion that succession experts provide is creating an emergency succession plan. Vanderbloemen and Bird emphasize that it is important to formulate an emergency succession plan and communicate the various pieces to the proper parties. They observe that many pastors have wills, life insurance plans, and advanced directives

¹⁹⁸ Saporito and Winum, *Inside CEO Succession*, 93.

¹⁹⁹ Saporito and Winum, *Inside CEO Succession*, 94.

²⁰⁰ Bronner and Chand, *Planning Your Succession*, 81.

in place, so they ask, “Why don’t they also have those types of contingency plans in place for their church?”²⁰¹

These types of short-term plans, Vanderbloemen and Bird suggest, offer organizational coverage and clarity if a senior pastor, or organizational leader, takes another job unexpectedly, is fired for cause, dies suddenly, or retires without advanced notice.²⁰² Greer and Fagerstrom agree that creating an emergency succession plan is critical for every organization. They observe that these plans not only reduce situational anxiety but also provide immediate next steps to key organizational leaders. Emergency succession plans communicate who the next leader up is, the interim role, scope of power, and the action steps needed to find a permanent replacement.²⁰³

Weese and Crabtree concur that crisis transition plans are critical to organizational stability. They state that the existence of a crisis transition plan does not assume that the pastor is considering leaving or retiring but wisely acknowledges the finite nature of the role. They state that it is a best practice to plan for the unplanned, so that if the unplanned happens, order prevails.²⁰⁴

They also suggest a few additions to Greer and Fagerstrom’s emergency succession plan structure, noting that a well-designed crisis transition plan contains a safety plan, command structure, organizational chart, continuity of service plan, communication plan, and description of changing roles. They suggest that a safety plan

²⁰¹ Vanderbloemen and Bird, *Next: Pastoral Succession That Works*, 33.

²⁰² Vanderbloemen and Bird, *Next: Pastoral Succession That Works*, 49.

²⁰³ Greer and Fagerstrom, *Succession*, 125.

²⁰⁴ Weese and Crabtree, *The Elephant in the Boardroom*, 142, 190.

provide mental health resources for the staff if there is a sudden death or moral failure. Creating a new command structure and organizational chart provides organizational clarity around any shifting roles and titles. The continuity of a service plan acts as a guard rail stating and preserving core activities, programs, and mission of the organization. And the communication plan ensures the transfer of just-in-time information to staff, lay leaders, congregants, denominational bodies, friends of the church, and any media communities to reduce confusion, rumors, or additional organizational anxiety.²⁰⁵

Developing a Successor Profile

With an emergency succession plan in place, experts agree that another vital step early in the succession planning process is creating a successor profile. Korn Ferry transition experts Victoria Luby and Jane Stevenson state that successor profiles be created to align potential candidates with organizational needs, strategies, and long-term priorities. They note that once those future-focused organizational needs and strategies are clarified internally, the top priorities of the organization be linked to desirable candidate experiences, competencies, and personal traits to map out an aligned profile.²⁰⁶

Saporito and Winum share that sentiment, suggesting that outgoing CEOs and boards map the current and future environments that successors will face. These projections provide a blueprint for the specific traits the organization will need from its new leader.²⁰⁷ Timms concurs, but he also suggests that boards create talent profiles for

²⁰⁵ Weese and Crabtree, *The Elephant in the Boardroom*, 143.

²⁰⁶ Victoria Luby and Jane Stevenson, “7 Tenets of a Good CEO Succession Process,” *Harvard Business Review*, December 7, 2016, <https://hbr.org/2016/12/7-tenets-of-a-good-ceo-succession-process>.

²⁰⁷ Saporito and Winum, *Inside CEO Succession*, 90.

their high potential candidates. These individual candidate profiles serve as a benchmark, comparing and contrasting candidate biographies, educational backgrounds, job performance ratings, job histories, certifications, strengths, weaknesses, and supervisory comments. Cataloging and comparing these talent profiles with the successor profile streamline the selection process.²⁰⁸

Saporito and Winum also observe that in many successful organizations, the best succession candidates are often similar in character and values when compared to the outgoing leader but dissimilar in skillset. They observe that succession clones are often capable leaders, able to maintain the status quo, but are more likely to fail at strategically leading the organization into the future. A successor ought to embody the mission, vision, and values of the organization and also be equipped to lead the organization into the future. This capacity often requires successors to be agile problem solvers and have future-focused skillsets aligned to the future strategies of the organization.²⁰⁹ Bronner and Chand agree, stating that senior leaders who focus on finding potential successors who have problem-solving skills because those successors will have a higher capacity to adapt to future challenges.²¹⁰

Larry Gilpin, an expert in pastoral transitions, agrees, stating the 80/20 rule. He says that what churches often need is not a successor with 20 percent of the

²⁰⁸ Timms, *Succession Planning That Works*, 194.

²⁰⁹ Saporito and Winum, *Inside CEO Succession*, 51.

²¹⁰ Bronner and Chand, *Planning Your Succession*, 65.

characteristics as the outgoing pastor but rather one with 80 percent. The additional 20 percent in an ideal candidate would fill the outgoing leader's knowledge or skills gaps.²¹¹

Bronner and Chand also state that cultural compatibility can be the difference between succession success and failure. A candidate profile, they say, must align with core organizational beliefs, values, and strategies.²¹² Saporito and Winum agree with Bronner and Chand that potential successors must be great culture fits because hiring a successor signals informal information to the rest of the organization. That successor either affirms and embodies the attitudes, beliefs, and values of the organization or does not, signaling the possibility of more change coming to the organization.²¹³

Weese and Crabree suggest that all organizations, including churches, must have accurate assessments of their organizational culture to be successful in transitional hiring. They propose that potential successors must be great culture fits, because an organization's DNA is much stronger than any individual leader. The selection process must proceed strategically, taking into account a candidate's fit in the wider system, which is why successor profiles must map and reflect an accurate picture of the organizational culture.²¹⁴

²¹¹ Gilpin, *When Your Long-Term Pastor Leaves Your Church*, 79-82.

²¹² Bronner and Chand, *Planning Your Succession*, 54.

²¹³ Saporito and Winum, *Inside CEO Succession*, 52.

²¹⁴ Weese and Crabtree, *The Elephant in the Boardroom*, 133.

Building an Internal Leadership Pipeline

The experts suggest the easiest way to find great culture fits is to grow them internally. Timms notes that leadership development programs should be understood as turbo-boosters, not the engine, in the succession process. He observes that the board of directors and outgoing CEO are the succession engine but that the individualized leadership development programs boost their candidates' transition readiness. He suggests that organizations creating custom leadership development programs ensure their future leaders can meet the unique requirements of the organization. Building customized programs help fill crucial knowledge or skills gaps within leading candidates. By tailoring individualized leadership development programs to succession candidates, candidates are more likely to be prepared for the challenges that they and the organization will face. Timms states that these individualized plans ought to challenge candidates with problem-solving exercises and team assignments over at least a year or two, to give boards and outgoing leaders time to calculate the potential ROI of the candidates.²¹⁵

Bronner and Chand agree with Timms and note that having a leadership development focus can grow the type of successors an organization needs. Developing a well-designed internal leadership development program becomes an 'incubator for the leadership qualities required in succession candidates.'²¹⁶ Vanderbloemen agrees that churches and organizations that do not develop their leadership bench often suffer long-term results. He states that pastors and business leaders must not fail to identify the leadership potential in their staff. No matter how far away succession may seem, he

²¹⁵ Timms, *Succession Planning That Works*, 180.

²¹⁶ Bronner and Chand, *Planning Your Succession*, 63.

emphatically states, it is never too early to acknowledge and develop the strengths of your team members.²¹⁷

Das Narayandas, Business Administration Dean at Harvard, concurs that internal leadership development programs develop excellent candidates. He states that his reasoning is based upon the neuroscience of learning, which says the distance between where a skill is learned (the locus of acquisition) and where it is applied (the locus of application) greatly influences the probability of that skill being put into effective practice. He observes that it is much easier to use a new skill if the locus of acquisition is similar to the locus of application, which is called near transfer.²¹⁸

Leadership experts know the benefits of proximity that internal development programs bring, as well as the higher rates of employee retention they bring. Bronner and Change say that senior leaders who pour time and effort into developing their staff's leadership capacity are more likely to retain their staff and grow potential successors who are fit and ready for service. Leaders who do this are also more likely to attract more competent leaders, which in turn creates a deeper bench.²¹⁹

Vanderbloemen and Bird share that sentiment, saying too many churches don't have leadership development pipelines and therefore are starved for gifted leaders. They suggest that the best way to find viable succession candidates is to grow them from within. They agree with Tichy that developing a system in which many people at many levels are offered next steps in their own leadership development will lead to the

²¹⁷ Vanderbloemen, "12 Things Failed Succession Have in Common."

²¹⁸ Das Narayandas, "The Future of Leadership Development," *Harvard Business Review*, March 2019.

²¹⁹ Bronner and Chand, *Planning Your Succession*, 63.

development of viable successor candidates in time. A church-wide culture of leadership development will not only help churches in their current mission but in the development of potential successors.²²⁰

Saporito and Winum agree with developing an internal pipeline, because they have observed in many CEO successions that a best practice is to have more than one internal candidate considered for the top spot. They mention that a recurring theme with board chairs and CEOs was the need to benchmark a few internal candidates against each other to nuance final decisions about a best fit candidate.²²¹

They also state that the most successful successions occur because internal candidates were groomed, tested, and selected over a long period of time. They say that the best outcomes come from internal leadership development programs that take into account the systemic impact of leadership transitions. They note that the reality is that a CEO succession is not simply a singular transition but often a cascade of transitions, two to three levels deep. This systemic impact can energize younger internal leaders, creating upward mobility for them, and even reinforce the positive impact of the transition itself.²²²

Jim Collins, leadership expert and author, agrees, showing how ten of his eleven good-to-great CEOs came from inside the organization.²²³ The conventional wisdom is to surround a genius with a thousand helpers, but he found that great companies hired and

²²⁰ Vanderbloemen and Bird, *Next*, 35.

²²¹ Saporito and Winum, *Inside CEO Succession*, 92.

²²² Saporito and Winum, *Inside CEO Succession*, 78.

²²³ Jim Collins, *Good to Great* (New York, NY: HarperCollins Publishers, 2001), 32.

developed the right people for the right jobs. Level 5 leaders were humble, willful, and cultivated people, often high potential insiders, with opportunities to grow.²²⁴

Senior pastor, CEO, and senior leader successions are never simple, but the anxiety they bring can be reduced through best practices. Bronner and Chand state that internal leadership development programs offer higher quality internal candidates. They observe that internal candidates often fare much better than external candidates in most successions, because they know the culture, embody the culture, and often have the relationship capital to mobilize the organization's people, resources, and trust. But they also note that external candidates could be preferred in rare cases, if an organizational course correction or total overhaul is needed. In these instances, when a significant change is needed, external candidates can be preferred.²²⁵ Saporito and Winum concur, stating the clear advantages for organizations that cultivate their own talent for succeeding generations, but in instances where an organization needs a shock to the system, external candidates are preferred instruments of change. External candidates, they note, must have emotional strength, mental agility, conviction, and charisma to withstand the strong headwinds they will likely face.²²⁶

Developing a Communication Plan

Transparency builds trust within organizations. Whether the organization is a church, family business, or corporation, its succession planning process sends signals to

²²⁴ Collins, *Good to Great*, 35.

²²⁵ Bronner and Chand, *Planning Your Succession*, 53.

²²⁶ Saporito and Winum, *Inside CEO Succession*, 146.

its stakeholders. What type of signal it sends is dependent upon the level of transparency or secrecy it uses in the succession process. Human resource experts Marie LaMarche and Kim Ruyle suggest that healthy organizations create buy-in through transparent succession plans. They say that once an organization creates a leadership development program, a transparent succession process can fuel the proactive development of its internal leaders by communicating its strategy, timeline, and priorities.²²⁷ McKinsey & Company's senior editor, Rama Ramaswami, agrees with LaMarche and Ruyle's assessment, stating that providing clarity around the process reduces tension and rumors within the organization.²²⁸

To provide organizational clarity around the succession process, Vanderbloemen states that a communication plan is paramount. He observes that the higher the public visibility of the church or the organization, the more likely the public is to report every misstep it observes, making a communication plan central to the succession process.²²⁹

Bronner and Chand agree with Vanderbloemen, stating that stakeholder engagement is absolutely necessary. They also say that the context in which communication is shared and received is important as well. For example, stakeholders will react to communication around a planned succession very differently than an abrupt one.²³⁰ A planned succession provides time to process the organizational and personal

²²⁷ Marie LaMarche and Kim Ruyle, "Should You Tell Employees They're Part of a Succession Plan?," *SHRM: HR Talent* (blog), January 7, 2015, <https://www.shrm.org/hr-today/news/hr-magazine/pages/010215-succeesion-planning.aspx>.

²²⁸ Rama Ramaswami, "Leading Off," *McKinsey & Company*, 2022, <https://www.mckinsey.com/~media/mckinsey/email/leadingoff/2022/03/21/2022-03-21b.html>.

²²⁹ Vanderbloemen, "12 Things Failed Succession Have in Common."

²³⁰ Bronner and Chand, *Planning Your Succession*, 48.

loss, whereas an abrupt change provides no notice or calculation of the loss and grief that stakeholders will experience.²³¹

Saporito and Winum agree with Bronner and Chand that communication plans are crucial in aligning an entire organization during the succession process. They note that strategic information needs to reach the right stakeholders at the right times. When information flowing from an organization is either inconsistent or not flowing at all, it impacts the organization. A smooth transition avoids having its leaders trying to piece together information from their peers, who do not know the full story. These scenarios cause instability, rumors, and unnecessary friction in the transition process.²³² Communication manages these risks and in so doing reduces the organizational tension that comes with significant leadership change. These plans originate from the succession timeline, parallel it, and state the stakeholders' degree of information to be provided, the vehicle of the information, and the dates when communication ought to be received.

Elizabeth Johnson, a change management expert, notes that the proximity of impact must also be considered when significant change is occurring inside an organization.²³³ For instance, the board and senior pastor of a pastoral staff ought to notify the staff they work alongside before they notify the congregation. The reason is stakeholder proximity and impact. Both groups of stakeholders will be impacted by the senior leader's transition but in varying degrees.

²³¹ Gilpin, *When Your Long-Term Pastor Leaves Your Church*, 76.

²³² Saporito and Winum, *Inside CEO Succession*, 167, 176.

²³³ Elizabeth Johnson, "How to Communicate Clearly During Organizational Change," *Harvard Business Review*, Change Management, June 13, 2017, <https://hbr.org/2017/06/how-to-communicate-clearly-during-organizational-change>.

CEO and author Peter Greer suggests an additional note in the communication plan. He states that writing his resignation letter, sealing it, and keeping it in his office desk has reminded him that he is replaceable and that one day he will transition from his current position. He says that the simple practice of writing the letter helped him to communicate his vision and future wishes for his organization. In working backwards to himself, the most impacted stakeholder, he discovered greater clarity for leading his organization.²³⁴

Celebrate The Succession

The last essential element that church leadership and organizational leadership experts expressed is finishing strong through celebration. James Kouzes and Barry Posner, leadership experts and best-selling authors, say that public celebrations of accomplishments build commitment throughout an entire organization. They not only impact the individuals being celebrated but all of those observing the celebration. The public celebration affirms employees' contributions. Public ceremonies, they note, serve as a collective reminder of why people remain with an organization and of the values and visions they share.²³⁵

Vanderbloemen agrees and observes that healthy successions always plan to end on a high note. He states that it is important that the staff, board, and congregants celebrate publicly and privately the tenure, accomplishments, and impact of the outgoing

²³⁴ Greer and Fagerstrom, *Succession*, 40.

²³⁵ James Kouzes and Barry Posner, *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*, 6th ed. (Hoboken, NJ: John Wiley & Sons Inc., 2017), 276.

pastor, as well as the pastor's spouse. He also qualifies that personal goodbyes and thank yous for the outgoing pastor and spouse should be individualized. This inclusion takes stock of individual contributions to the life of the church and celebrates them. He also suggests a best practice for retiring pastors is sending them on a dream trip, commissioning a professional photo or portrait of the outgoing pastor, as well as bringing in any mentors or significant people in the life of the outgoing pastor, to celebrate the pastor in transition.²³⁶

Not only is celebration important in senior pastor successions but it is also key in CEO successions. Saporito and Winum state that when it is necessary to have a clean break from the outgoing leader, it is best done before a new leader comes on, but in most cases, it is a best practice to overlap the outgoing and incoming leaders' tenures by at least a few months to transfer institutional knowledge and celebrate the transition. Healthy transitions, they observe, often have an outgoing leader excited to invest in the incoming leader, helping establish his credibility and knowledge inside and outside of the organization.²³⁷ Greer and Fagerstrom agree that in the healthiest transitions, leaders respect, honor, and celebrate one another on their way out and on their way in. They say that cheering on a successor publicly and privately is essential to a smooth transition.²³⁸ But they also note that one way an outgoing leader can unintentionally dishonor a successor is by leaving messes for that successor to clean up. They state that honorable leaders do not delay difficult decisions but address them in advance of their planned

²³⁶ Vanderbloemen and Bird, *Next*, 174.

²³⁷ Saporito and Winum, *Inside CEO Succession*, 152.

²³⁸ Kouzes and Posner, *The Leadership Challenge*, 275.

succession. Leaders who navigate healthy succession do everything in their power to set up their successor for success.²³⁹

Summary of Key Elements in Succession Planning

As the researcher examined CEO and church succession literature, he discovered the leadership experts included seven common elements in their successful succession processes. Those elements were identifying the key stakeholders in the succession process, the development of a succession timeline, the creation of a successor profile, the need for an emergency succession plan, the positive impact of an internal leadership development program, a detailed communication plan, and a public ceremony or celebration. These core elements are not exhaustive or industry specific but rather reflect the common elements found in the cross-industry research on succession planning. Additional elements were discovered in the researcher's reading but were not included due to a lack of cross-industry consensus. In an effort to discover best practices in pastoral succession planning, the researcher also learned about the organizational anxiety that key leadership transitions bring.

Leadership Traits That Reduce Organizational Anxiety

This study of systems literature focused on select elements of Bowen's Family System Theory to discover the systemic impact of a leader's self-differentiation and non-anxious presence on the succession planning process. System experts note that these key leadership traits naturally reduce anxiety when an organization is experiencing change,

²³⁹ Greer and Fagerstrom, *Succession*, 147.

transition, or trauma. As transition expert Vanderbloemen emphatically states, pastoral transitions cause system-wide anxiety throughout the church staff and congregation.²⁴⁰

In this review of systems literature, the researcher explored four areas of inquiry. First, the researcher explored the nature of church congregations as emotional systems. Second, organizational anxiety was defined in relation to its systemic impact. Third, Bowen's theory of differentiation and non-anxious presence was examined as it relates to the reduction of organizational anxiety. Lastly, the researcher summarized key findings.

Congregations As Emotional Systems

Author and congregational systems expert Ronald Richardson, states that church congregations are a family system, made up of multiple families, groups, or triangles. The family system is logical and emotional in its makeup. Anytime there is a family disruption, crisis, or significant change, anxiety results from the change and permeates throughout the system.²⁴¹

Individuals within the family system resist loss in the process of change more than the change initiative itself. Therefore, reducing the sense of loss and grief in the change process is paramount to restoring equilibrium and maintaining missional continuity. William Bridges, in his seminal work on managing transitions, calls this second phase of transitions, navigating the "neutral zone."²⁴²

²⁴⁰ Vanderbloemen and Bird, *Next*, 173.

²⁴¹ Ronald Richardson, *Creating a Healthier Church: Family Systems Theory, Leadership, and Congregational Life* (Minneapolis, MN: Augsburg Fortress, 1996), 41.

²⁴² Bridges and Bridges, *Managing Transitions*, 5.

Successions are intentional change initiatives aimed at reducing organizational time in the neutral zone, but as system experts note, most pastors are not well-differentiated leaders and lack the capacity to accomplish smooth transitions.²⁴³ Leadership expert Robert Creech suggests leaders can grow in that regard by spending ample time learning about themselves, their family of origin story, their own anxieties, as well as taking ownership of their leadership failures and successes.²⁴⁴ Pastor and family systems author Jack Shitama agrees, stating that pastors must do their own emotional work to bring to balance to an emotionally imbalanced congregation.²⁴⁵

Bowen Family System author and expert Roberta Gilbert observes that church congregations and organizations show many of the same characteristics as families. Each is an emotional system and when given enough anxiety, will exhibit conflict, distance, cutoff, over-functioning, under-functioning, and triangulating. That is because congregations, like families, are emotional systems, she notes.²⁴⁶

Just as parents set the emotional tone for their family, leaders in churches and organizations set it for theirs. Gilbert states that high level leaders communicate openly, treat others as equals, set boundaries, and contact anxious people to calm them. As the

²⁴³ Jack Shitama, *Anxious Church Anxious People: How to Lead Change in an Age of Anxiety* (Earleville, MD: Charis Works, 2018), 41-59.

²⁴⁴ Robert Creech, *Family Systems and Congregational Life: A Map For Ministry* (Grand Rapids, MI: Baker Academic, 2019), 32-35.

²⁴⁵ Shitama, *Anxious Church Anxious People*, 16-23.

²⁴⁶ Roberta Gilbert, *Extraordinary Leadership: Thinking Systems, Making a Difference* (Falls Church, VA: Leading Systems Press, 2006), 19.

leader moves to higher levels of emotional functioning, so goes the group of emotional individuals who he or she leads.²⁴⁷

Creech agrees with Gilbert, stating that leadership is emotional work, not solely logical. Effective leaders naturally generate emotional turmoil in the system. The leader's job is to communicate before, during, and after any change initiative, to produce as little negative emotional impact as possible. Creech observes this capacity to lead an emotional system requires an emotionally attuned leader.²⁴⁸

Leadership coach and church consultant Tod Bolsinger agrees with Creech's assertion that pastors function far better in their capacity to lead change when they are emotionally differentiated and attuned to the needs of others. But Bolsinger also observes that churches, seminaries, and nonprofit organizations are notorious for saying they need change and then resist the leader they hired to bring it. He notes that change brings anxiety, and organizational anxiety often results in self-preservation and survival.²⁴⁹

Bolsinger also notes that when churches experience organizational trauma or loss, hopeful energy wanes within the system. He says it is critical that leaders within the church exemplify empathy toward to the needs of the congregation so they can help them resist despair and cynicism. The capacity for leaders to attune to the emotional system in which they are connected is critical to move forward through their transition.²⁵⁰

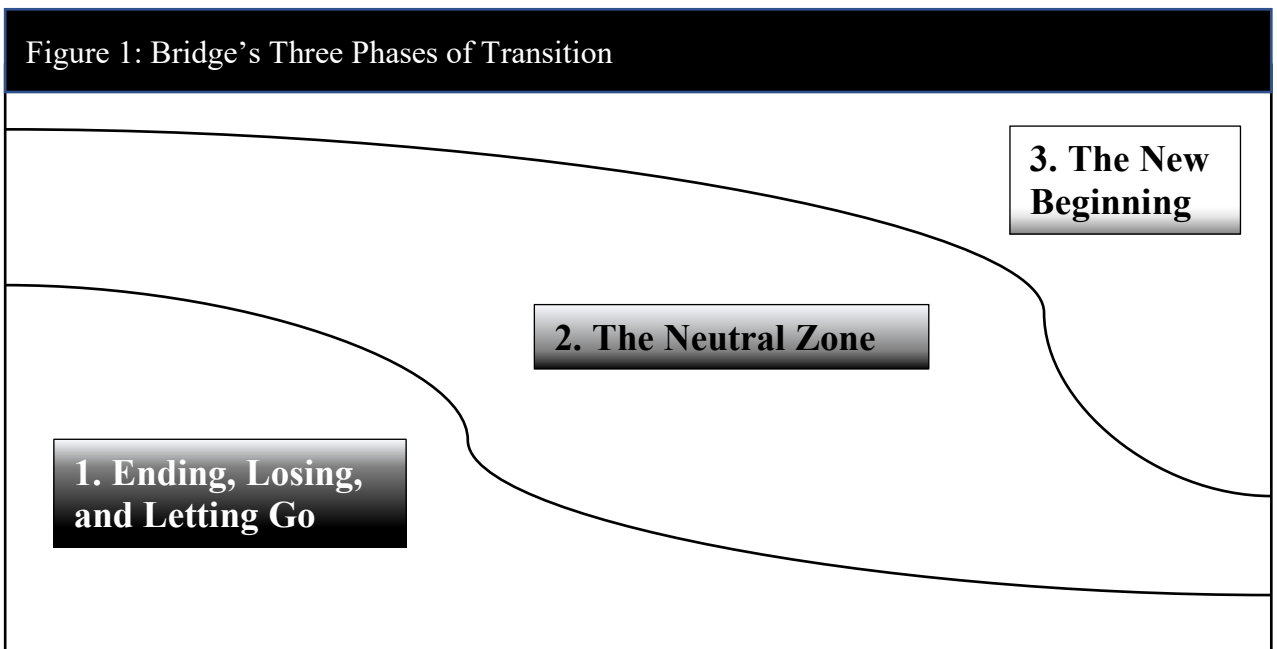
²⁴⁷ Gilbert, *Extraordinary Leadership*, 23-29.

²⁴⁸ Creech, *Family Systems and Congregational Life*, 34-35.

²⁴⁹ Tod Bolsinger, *Tempered Resilience: How Leaders Are Formed in The Crucible of Change* (Downers Grove, Ill: InterVarsity Press, 2020), 26-27.

²⁵⁰ Bolsinger, *Tempered Resilience*, 29.

Best-selling author and change consultant William Bridges agrees with Creech and Bolsinger, stating that organizations are complex psychological systems. He says when they experience a significant transition, like an acquisition, split, or a senior leader transition, psychological realignments and repatterning take place within the system.²⁵¹ He notes that the key to navigating successfully is to engage the people within the organization through all three phases of the transition.



Bridges states that the three phases of organizational transition are: (1) Ending, Losing, and Letting Go, (2) The Neutral Zone, and (3) The New Beginning.²⁵² Letting go is the first phase of any transition, and it is the emotional process of calculating the change as loss and grieving that loss. The second phase, the neutral zone, is the in-between space, where the old system, old leader, or old way of doing things is gone, and

²⁵¹ Bridges and Bridges, *Managing Transitions*, 3.

²⁵² Bridges and Bridges, *Managing Transitions*, 3-5.

the new is not fully operational yet. The third phase is the new beginning, where people develop the new identity, experience, new energy, and buy-in to the vision or leader that necessitated the change.²⁵³

Organizations going through significant change either succeed or fail based on their leadership's capacity to attune to the needs of the people as they pass through the multiple phases. Bridges observes that most organizations pay little to no attention to endings, nor do they acknowledge the neutral zone. He says that leaders often make the mistake of jumping to phase 3, the new beginning, without addressing, acknowledging, or leading through phases 1 and 2.²⁵⁴ Failing to show empathy as the organization struggles through phase 1 and 2 can be a costly mistake.

Empathy is required to help colleagues mourn and grieve the loss that change brings. Bridges states that a non-anxious presence provides stability during the "psychological no-man's-land" of the neutral zone.²⁵⁵ He suggests that leaders use symbolic actions frequently during all three phases to show appreciation to their people. Bridges also notes that organizational celebrations during phase 3 help reduce the sense of loss inside an organization. These intentional acts can mark organizational turning points, capping a season of change and grief, and ceremonially ushering in the future.²⁵⁶

²⁵³ Bridges and Bridges, *Managing Transitions*, 4-5.

²⁵⁴ Bridges and Bridges, *Managing Transitions*, 7.

²⁵⁵ Bridges and Bridges, *Managing Transitions*, 8-10.

²⁵⁶ Bridges and Bridges, *Managing Transitions*, 177-181.

Leadership Transitions Cause Organizational Anxiety

Richardson states that Bowen's Family Systems Theory (BFST) labels the sense of threat that people or systems experience as anxiety. He observes that anxiety is an uncomfortable feeling that is less tangible and more amorphous than fear. It is a feeling of lack of control or deep imbalance. He notes that churches can experience this organizational anxiety most acutely when change, leadership transitions, or moral and theological threats impact the system.²⁵⁷

He observes that anxiety, at its most basic level, is about the threat of a lost sense of identity. Richardson believes this threat of loss can happen to individuals as well as churches and organizations.²⁵⁸ He says that in human beings, as well as in systems of humans, there is an innate biological and organizational response to threats. The body, as well as groups of bodies, exhibit fight or flight responses when challenged by formidable threats.²⁵⁹

Leadership authors Herrington, Taylor, and Creech agree with Richardson, stating that leadership transitions can cause an identity crisis in some churches. They say that these transitional periods of crisis are often marked by widespread feelings of instability, loss, grief, and threat.²⁶⁰ Creech observes that anxiety is inherently relational and that anxiety is an invisible force at work within all congregational systems, rarely accounted for by pastors and church leaders. What is needed, he observes, is a highly differentiated

²⁵⁷ Richardson, *Creating a Healthier Church*, 42-44.

²⁵⁸ Richardson, *Creating a Healthier Church*, 48.

²⁵⁹ Richardson, *Creating a Healthier Church*, 41.

²⁶⁰ Jim Herrington, Trisha Taylor, and Robert Creech, *The Leader's Journey: Accepting the Call to Personal and Congregational Transformation* (Grand Rapids, MI: Baker Academic, 2003), 97.

leader strong enough to resist the pull of the system and who can hold on long enough to see the new change through to the other side.²⁶¹

Shitama approves of Creech's and Friedman's conclusion, that what churches and organizations need are differentiated leaders. He believes that because of today's rapid change, there is an underlying sense of anxiety in society, which grows when there is a significant transition, trauma, or change initiative within an organization. He notes that leaders who are not well differentiated often look for quick fixes to soothe the chronic anxiety but fail because they lack the qualities necessary to calm the masses.²⁶²

Gilbert states that the result of anxious leaders is an anxious organization. Anxious organizations are different animals from what they are in calmer times. She observes that organizations today often need only a catalytic event to trigger systemic anxiety. Gilbert agrees with Richardson, that leadership transitions are nodal events, frequently resulting in organizational anxiety.²⁶³

Vanderbloemen concurs, stating that transitions force church staff members and employees to come to terms with the possibility of large changes. He notes that a singular change might impact an aspect of the life of the church but a transition in the senior pastor role might impact multiple areas of ministry including preaching, leadership, the office environment, work relationships, order of worship, budget priorities, and

²⁶¹ Creech, *Family Systems and Congregational Life*, 36-37.

²⁶² Shitama, *Anxious Church Anxious People*, 2-3.

²⁶³ Gilbert, *Extraordinary Leadership*, 134.

ministerial programs. The nature of the transition, which brings with it many unknowns, can easily cause staff anxiety.²⁶⁴

Edwin Friedman and Jack Shitama observe that churches and organizations often react to anxiety-inducing transitions in four ways.²⁶⁵ The first reaction is congregational blaming, the system's propensity to assign blame to someone or something for the change.²⁶⁶ Second, some congregations react with a herding mentality. These congregations discourage self-definition and focus on togetherness, adding internal pressure to conform to norms when an alien or outside anxiety impacts the group.²⁶⁷ Third, congregations blame outside forces for one's own condition as a way to mitigate anxiety. Blame displacement perpetuates congregational feelings of victimization and helplessness.²⁶⁸ The fourth reaction to congregational anxiety is the quick fix mentality. The quick fix mentality alleviates the immediate symptoms of pain, change, or difference, without implementing a long-term strategy, planning process, analysis of the emotional state of the entity, or long-term impact of the Band-Aid fix. Congregations who react with this mentality have a low threshold for systemic pain and look for quick positive change, without weighing the long-term consequences.²⁶⁹

²⁶⁴ Vanderbloemen and Bird, *Next*, 173.

²⁶⁵ Edwin Friedman, *A Failure of Nerve: Leadership in the Age of the Quick Fix*, 3rd ed. (New York, NY: Church Publishing, 1999), 69-96.

²⁶⁶ Shitama, *Anxious Church Anxious People*, 42-46.

²⁶⁷ Shitama, *Anxious Church Anxious People*, 47-49.

²⁶⁸ Shitama, *Anxious Church Anxious People*, 49-52.

²⁶⁹ Shitama, *Anxious Church Anxious People*, 52-55.

In conclusion, Heifetz, Grashow, and Linsky state that adaptive leadership requires an understanding of organizational resistance. They agree with Shitama, Creech, and Gilbert that people don't resist change or transition; they resist what they are losing because of the change. They state that identifying the potential losses people may experience in leadership transitions, and helping them survive them, through empathetic responses, competence, and shared responsibility, goes a long way to reducing the organizational friction that is stirred up by transitions.²⁷⁰

Differentiation of Self and Non-Anxious Presence

Two pastoral traits that reduce organizational and congregational anxiety are Murray Bowen's theory of differentiation of self and Edwin Friedman's non-anxious presence. Both traits focus on a leader's own journey of self-discovery, gaining self-awareness, clarity around their family of origin story, and the developmental skills of self-regulation and relationship management.

Bowen defines differentiation of self as the capacity to name one's beliefs and values and also understand one's own need for others, while maintaining a sense of calm and clear-headedness in the face of conflict, criticism, rejection, and change.²⁷¹

Creech says the leader working on differentiation will be better able to provide a steady hand to a congregation facing a significant change like a succession or transition in leadership. Such leaders will offer their congregations a better chance to thrive and

²⁷⁰ Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership*, 96-101.

²⁷¹ Murray Bowen, "Differentiation of Self," *The Bowen Center for the Study of the Family* (blog), n.d., <https://www.thebowncenter.org/differentiation-of-self>.

serve effectively when the culture around them is anxiously spinning into regressive reactivity.²⁷² Gilbert agrees, stating that as leaders work on being more self-differentiated, the more differentiated those inside the system are likely to become.²⁷³

Bolsinger agrees with Gilbert and Creech, stating that the emotional competency of pastors is probably the most important factor in pastoral effectiveness. The cornerstone of emotional intelligence is self-awareness and self-definition. Self-awareness leads to empathy, and empathy fuels connections, which is the backbone of building adaptive teams in a rapidly changing world.²⁷⁴ Leading any group through major change is disruptive. But leaders who develop an internal sense of self, resilience, and the adaptive capacity to focus on the mission of the group will have a greater likelihood of leading that group through the change.²⁷⁵

Herrington, Taylor, and Creech agree with Bolsinger, noting self-differentiation requires an inside-out change that focuses on being, rather than doing. To become more differentiated, leaders must start to see the anxiety in themselves and in the systems around them. To attain this awareness and sense of calm, leaders must better understand where, with whom, and in what circumstances they become anxious. Developing this internal capacity is critical to replicate this capacity in a system experiencing anxiety.²⁷⁶

²⁷² Creech, *Family Systems and Congregational Life*, 33.

²⁷³ Gilbert, *Extraordinary Leadership*, 108.

²⁷⁴ Bolsinger, *Tempered Resilience*, 63.

²⁷⁵ Bolsinger, *Tempered Resilience*, 4.

²⁷⁶ Herrington, Taylor, and Creech, *The Leader's Journey*, 79.

Shitama concurs, stating the basic concept of leadership differentiation is a leader taking primary responsibility for his or her own self-awareness and self-management goals, while staying in touch with the rest of the organism. He says, like a human body, if one's head is properly oriented, the body will usually follow. He also states that there may be initial organizational resistance, but, if the leader can stay in touch with the change champions and the resisters, the body will usually go along.²⁷⁷

Scaling emotional skills is critical for churches and organizations, but it cannot happen if the leaders are not first emotionally skilled themselves, says Richardson. Organizational self-regulation is possible, but only if the leaders of the organization are self-regulated themselves. Leaders must do their own self-work to be able to transfer that work into the system.²⁷⁸ Herrington, Taylor, and Creech state that leaders with a clear understanding of who they are and who they are not are more likely to replicate this trait inside their organization. System differentiation starts by leaders individually becoming more self-differentiated.²⁷⁹

Leadership is an emotional process, rather than a cognitive phenomenon, and well-differentiated leadership drives healthy institutions, Friedman observes.²⁸⁰ A well-differentiated leader is less likely to become lost in the anxious emotional processes swirling about.²⁸¹

²⁷⁷ Shitama, *Anxious Church Anxious People*, 9.

²⁷⁸ Richardson, *Creating a Healthier Church*, 47-50.

²⁷⁹ Herrington, Taylor, and Creech, *The Leader's Journey*, 106.

²⁸⁰ Friedman, *A Failure of Nerve*, 14.

²⁸¹ Friedman, *A Failure of Nerve*, 15.

Table 3: Edwin Friedman’s Comparison of Differentiated Leadership

Poorly Differentiated Leadership	Well-Differentiated Leadership
Focuses on technique	Concerned with one’s own growth
Works with symptomatic people	Works with motivated people
Betters the condition	Matures the system
Concerned to give insight	Concerned to define self (take stands)
Seeks symptomatic relief	Seeks enduring change
Quick to quit difficult situations	Challenged by difficult situations
Sees problems as the cause of anxiety	Sees problems as the focus of pre-existing anxiety
Has a reductionistic perspective	Has a universal perspective
Likely to create dependent relationships	Likely to create intimate relationships

Edwin Friedman defines a non-anxious presence as a person’s ability to comfort any system of people around them, no matter what that system of people might be experiencing.²⁸² He says that what counts in organizations, churches, and families is the leader’s presence and being, not technique and know-how. Just as a head disproportionately influences all parts of a body, so too do leaders in any system. A non-anxious presence is not easily thwarted by sabotage during organizational disharmony.²⁸³

Creech concurs and notes that the process of becoming a less anxious leader is not through deep-breathing exercises but rather is the product of becoming a better-differentiated person. He says that self-work, identification, and regulation is a lifelong project of becoming progressively less emotionally fused to others so that one can remain calm in relationship with them, while exchanging less and less of one another’s anxiety. Simply put, a non-anxious presence is the personal capacity to be the calmest person in

²⁸² Friedman, *A Failure of Nerve*, 18.

²⁸³ Friedman, *A Failure of Nerve*, 18-19.

the room.²⁸⁴ Leaders need to stay connected to the anxious congregation, managing their own internal anxiety, to be a calm, non-anxious presence amid systemic turmoil. He says the capacity to hold tight in the turmoil is significant, to see the system through the final phases of change.²⁸⁵

Richardson agrees, noting that churches function best when their leaders are properly balanced emotionally, because when anxiety strikes the system, they can calm the entire system. The calmer the leader or leaders are, the greater the calming effect will be on the entire congregation.²⁸⁶ Herrington, Taylor, and Creech say that the leader's main job is to create an emotional atmosphere in which greater calmness exists – to be a less anxious presence among many who are anxious.²⁸⁷

Shitama concurs, stating that a non-anxious leader must contain his or her own anxiety while staying emotionally connected to the congregation. He says self-regulation is vital to expressing a non-anxious presence during organizational change, transitions or trials.²⁸⁸ It requires leaders to be quiet, intentional, and deeply reflective about their own internal anxiety, pinpointing where it is coming from, so that leaders can offer the same capacity to their people.²⁸⁹

²⁸⁴ Creech, *Family Systems and Congregational Life*, 39, 45.

²⁸⁵ Creech, *Family Systems and Congregational Life*, 37.

²⁸⁶ Richardson, *Creating a Healthier Church*, 42.

²⁸⁷ Herrington, Taylor, and Creech, *The Leader's Journey*, 78.

²⁸⁸ Shitama, *Anxious Church Anxious People*, 13.

²⁸⁹ Shitama, *Anxious Church Anxious People*, 16.

Creech agrees that non-anxious leaders focus on their own lives, their own thinking, their own roles and responsibilities, their own part to play, the log in their own eye, rather than on the failures of others. He says self-management is indispensable for a leader in anxious settings.²⁹⁰

Summary of Leadership Traits That Reduce Organizational Anxiety

Church congregations, like organizations, are emotional systems. As an emotional system, congregations experience varying levels of anxiety when change, trauma, or transitions occur. To calm an anxious group, leadership experts agree that a specific kind of leadership is needed. Leaders who are well-differentiated and who possess a non-anxious presence are more likely to have a calming effect on their congregational system than leaders who are not. Leadership techniques and strategies are not valid replacements for highly differentiated leaders.

Bolsinger aptly states that leading change through pastoral transitions requires the capacity to help others feel accompanied in the transformational journey. Only highly differentiated leaders have the internal capacity to attune to the needs of their people. Emotional attunement is the way to develop and harness the capacity to make major adaptations to work environments, build trust, and find the grit to stay with the transitional changes that accompany pastoral transitions.²⁹¹

Great teams, churches, and organizations run on psychological safety that is built through non-anxious leaders who exhibit empathy, good listening, and clear

²⁹⁰ Creech, *Family Systems and Congregational Life*, 53.

²⁹¹ Bolsinger, *Tempered Resilience*, 67.

communication. Empathy is particularly vital because it enables leaders to support and care for congregations and organizations. This leadership capacity ultimately lessens organizational anxiety, encourages collaboration, and helps people move forward through seasons of change.²⁹²

Summary of Literature Review

In light of the literature examined, succession, leadership, and systems experts have a significant amount of wisdom to offer pastors, elders, and board members who are either in the process of or planning to navigate a leadership transition. Leadership transitions are notoriously difficult to navigate, but as the experts noted, essential elements and leadership traits can reduce the systemic anxiety that successions cause.

First, to establish the biblical practice of succession planning, the researcher analyzed two successful transitions. The leadership transitions from Moses to Joshua and Paul to Timothy support and encourage the modern practice of succession planning.

Second, corporate and church succession literature was examined to discover essential elements in the succession planning process. Seven common elements were discovered as key pieces to a successful succession plan. More elements were discussed by succession experts, but many failed to receive peer support.

Third, congregational systems experts discussed the impact that leadership transitions can have on an organization. They defined organizational anxiety and noted some of the impacts that system-wide anxiety can have on an organization. The experts also noted two leadership traits that significantly reduce organizational anxiety.

²⁹² Bolsinger, *Tempered Resilience*, 64.

Finally, experts in all the surveyed fields provided conclusions about how organizations like churches can plan for leadership transitions. The experts noted that the rational and emotional aspects of the organization needed to be accounted for and suggested a proactive leadership approach to reduce the impact of the systemic change.

Chapter 3

Methodology

The purpose of this study was to discover how senior pastors create continuity through their succession plan. The assumption of this study was that pastors who have developed a succession plan and implemented that plan in their transitions would have experiential knowledge, wisdom, resources, and suggestions for best practices building organizational continuity throughout the transition process. To examine these areas more closely, the following research questions guided the qualitative research:

1. How do senior pastors seek to create organizational continuity before their transition?
2. What are perceived challenges of succession planning?
3. What are essential elements of the succession planning process?
4. What are strategies that could reduce the organizational anxiety that congregation's experience in successions?

Design of the Study

Sharan B. Merriam, in her book, *Qualitative Research: A Guide to Design and Implementation*, defines a basic qualitative study as research most interested in “how people interpret their experiences, how they construct their worlds, and what meaning they attribute to their experiences.”²⁹³ Merriam identifies four characteristics of

²⁹³ Sharan Merriam and Elizabeth Tisdell, *Qualitative Research: A Guide to Design and Implementation*, 4th ed. (San Francisco, CA: Jossey-Bass, 2016), 6.

qualitative research: “focus on process, understanding, and meaning; the researcher is the primary instrument of data collection and analysis; the process is inductive; and the product is richly descriptive.”²⁹⁴ A qualitative approach, as opposed to a quantitative, statistical approach, enabled the researcher to explore the intertwined, relational nuances in church leadership transitions.

This study employed a qualitative research design and conducted semi-structured interviews as the primary source of data gathering. This qualitative method provided for the discovery of more comprehensive and descriptive data from participant perspectives in the narrow phenomena of continuity creation within succession planning.²⁹⁵

Participant Sample Selection

This research required participants able to communicate in depth about their experiences during their church’s pastoral transition. The ability to reflect, analyze, and articulate both pre- and post-transition “bridge building” factors was significant in the selection. Therefore, the purposeful study sample consisted of people from the population of pastors who have planned, written, and implemented a succession plan.²⁹⁶

Participants were chosen for a “maximum variation sample” on a few criteria to provide for common patterns in the data collected.²⁹⁷ Participants varied in age from 35 to 73 and lead pastoral tenures ranging from 15 to 42 years, which provides a wide

²⁹⁴ Merriam, *Qualitative Research*, 15-18.

²⁹⁵ Merriam, *Qualitative Research*, 110.

²⁹⁶ Merriam, *Qualitative Research*, 96.

²⁹⁷ Merriam, *Qualitative Research*, 98.

spectrum of best practice data. For minimum variation in issues of theology and gender, which are not a focus in the study, the participants were all men and held to Reformed theology.

The final study was conducted through personal interviews with seven Presbyterian pastors. They were invited to participate via an introductory letter, followed by a personal phone call. All expressed interest and gave written informed consent to participate. In addition, each participant signed a “Research Participant Consent Form” to respect and to protect the human rights of the participants.

There is a minimal risk level to each participant. Participants are asked to reveal personal information regarding individual viewpoints, background, experiences, behaviors, attitudes, and beliefs.

The seven research participants have been pastors of large churches ranging from 600 to 5,000 or more members. The participants have all assisted in the succession planning process of churches much larger than the average sized church in the United States. Six of the seven participants are active pastors and one is retired. Three of the seven participants were former senior pastors who co-authored their succession plans.

Finding positive examples of senior pastor successions was difficult. The research participants were selected for their knowledge, experience, and emotional intelligence in order to gather best practice data.

The research may have been inconvenient for participants by causing a delay or intrusion into their activities. Topics and questions raised were potentially emotionally, culturally, and psychologically sensitive. In order to alleviate the inconvenience and potential anxiety, that might have resulted from asking the research questions, the

research participants determined the day and time of the research interviews to suit their schedule and desired level of privacy. An email with the Research Participant Informed Consent Form was sent to each participant to confirm the confidential nature of the research interviews.

**RESEARCH PARTICIPANT INFORMED CONSENT FORM
FOR THE PROTECTION OF HUMAN RIGHTS**

I agree to participate in the research which is being conducted by (*Jeff Lee*) to investigate (*Succession Planning*) for the Doctor of Ministry degree program at Covenant Theological Seminary. I understand that my participation is entirely voluntary. I can withdraw my consent at any time without penalty and have the results of the participation, to the extent that they can be identified as mine, returned to me, removed from the research records, and/or destroyed.

The following points have been explained to me:

- 1) The purpose of the research is to investigate best practices creating continuity in senior pastor transitions.
- 2) Potential benefits of the research may include improved awareness of the importance of leadership pipelines, practices, and systems, as well as best practices developing emergency succession plans, and strategically planned transitions. Though there are no direct benefits for participants, I hope they will be encouraged by the experience of sharing their experiences with an eager listener and learner.
- 3) The research process will include video and audio recordings of 7 Pastors being asked questions by the researcher.
- 4) Participants in this research will participate in-person or via Zoom interview for 60 - 90 minutes.
- 5) Potential Discomforts: Topics or question raised are probably politically, emotionally, culturally, spiritually, or psychologically sensitive.
- 6) Potential risks: Minimal. Participants are asked to reveal personal information regarding individual viewpoints, background, experiences, behaviors, attitudes, or beliefs.
- 7) Any information that I provide will be held in strict confidence. At no time will my name be reported along with my responses. The data gathered for this research is confidential, and will not be released in any individually identifiable form without my prior consent, unless otherwise required by law. Audiotapes or videotapes of interviews will be erased following the completion of the dissertation. By my signature, I am giving informed consent for the use of my responses in this research project.
- 8) Limits of Privacy: I understand that, by law, the researcher cannot keep information confidential if it involves abuse of a child or vulnerable adult, or plans for a person to harm themselves or to hurt someone else.
- 9) The researcher will answer any further questions about the research, now or during the study.

Printed Name and Signature of Researcher

Date

Printed Name and Signature of Participant

Date

Research at Covenant Theological Seminary which involves human participants is overseen by the Institutional Review Board. Questions or problems regarding your rights as a participant should be addressed to: Director, Doctor of Ministry; Covenant Theological Seminary; 12330 Conway Road; St. Louis, MO 63141; Phone (314) 434-4044.
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Data Collection

This study utilized semi-structured interviews for primary data gathering. The open-ended nature of interview questions facilitates the ability to build upon participant responses to complex issues to explore them more thoroughly.²⁹⁸ Ultimately, these methods enabled this study to look for common themes, patterns, concerns, and contrasting views across the variation of participants.²⁹⁹

The researcher performed a pilot test of the interview protocol to evaluate the questions for clarity and usefulness in eliciting relevant data. Initial interview protocol categories were derived from the literature but evolved around the explanations and descriptions that emerged from doing constant comparison work during the interviewing process. Coding and categorizing the data while continuing the process of interviewing also allowed for the emergence of new sources of data.³⁰⁰

The researcher interviewed seven pastors individually, either in-person, or through Zoom for sixty to ninety minutes each. Prior to the interview, the participants received an email about optional interview dates and times. To accommodate participant schedules, the researcher gave each participant multiple windows of time within a two-month period from which to choose. The researcher video and audiotaped the interviews with a digital recorder. By conducting one interview a month, the researcher completed the data gathering in the course of seven months. Directly after each interview, the

²⁹⁸ Merriam, *Qualitative Research*, 124-125.

²⁹⁹ Merriam, *Qualitative Research*, 110-111.

³⁰⁰ Merriam, *Qualitative Research*, 203-210.

researcher wrote field notes with descriptive and reflective observations on the interview time.

The interview protocol contained the following questions and possible probing questions.

1. In what ways did the senior pastor prepare the church for his transition?
 - Who were some key participants in the planning process?
 - What role did the staff play in the planning process?
 - How was a succession timeline established?
 - How was outside counsel involved in the strategic planning?
 - How was the succession communicated to the congregation?
2. What are some perceived challenges of succession planning?
 - How did the church's leadership identify those key values?
 - How did the church maintain the priority of those values in the transition?
 - How did the church identify key values, programs, staff, or traditions that the congregation valued?
 - How did the succession plan reinforce and protect the mission critical values, programs, staff, or traditions?
3. What are some essential elements of the succession planning process?
 - How was the succession plan communicated?
 - Who were key people in the planning process?
 - Was outside counsel utilized?
 - How were potential candidates identified?

- How were potential candidates examined for mission, culture, and value fit?
 - What role did leadership development play in the succession plan?
4. What are some strategies that could reduce the organizational anxiety that congregation's experience in successions?
- Who were some leaders who brought a sense of calm in the process?
 - Describe some of their leadership traits.
 - What decisions did the senior pastor or church leadership make that comforted the congregation?
 - What strategies reduced congregational anxiety?
 - What decisions or strategies increased congregational anxiety?

As the interviews unfolded, the researcher developed more pointed probes to gain a better understanding of the key points. This process allowed for the emergence of new sources of data as the project unfolded.

Data Analysis

As soon as possible and always within one week of each meeting, the researcher personally transcribed each interview using computer software to play back the digital recording on a computer and typed out each transcript. The software allowed for the complete transcript to be typed out in its entirety, while ensuring accuracy, fluidity, and grammatical precision. This study utilized the constant comparison method of routinely analyzing the data throughout the interview process. This method provided for the

ongoing revision, clarification, and evaluation of the resultant data categories. According to Merriam, the categories constructed during data analysis should meet several criteria:

- Categories should be responsive to the purpose of the research.
- Categories should be exhaustive.
- Categories should generally be mutually exclusive.
- Categories should be sensitizing.
- Categories should be conceptually congruent.³⁰¹

After the interviews and observation notes were fully transcribed into computer files, they were coded and analyzed using categories. The analysis focused on discovering and identifying (1) common themes, patterns, and personal experiences across the variation of participants; and (2) congruence or discrepancy between the different groups of participants.

Researcher Position

In qualitative inquiry, the researcher is the responsible for defining and collecting the data to be analyzed. The researcher plays a significant role in data processing, and therefore should note key biographical and philosophical commitments.

First, the researcher is an evangelical Christian, who believes the Bible is the authoritative, infallible, inerrant, and inspired word of God. The researcher's understanding of the church, the church's mission, a pastor's role in the life of the church, and the moral and ethical imperative of pastoral leadership originates from the Bible.

³⁰¹ Merriam, *Qualitative Research*, 212.

Additionally, the researcher is a son of a pastor who witnessed firsthand the impact of having no succession plan on a succeeding pastor, his family, the church's mission, and the congregation as a whole. The researcher is also currently a church consultant and an Evangelical-Free pastor, who previously served as a PCA pastor to two local congregations in Virginia and one permanent agency of the PCA as a missionary over a fourteen-year period.

These experiences suggest some biases affecting the position of the researcher, but the researcher believes that these experiences have made him more sensitive to and aware of the issues being addressed.

Study Limitations

Due to limited time and resources, participants interviewed for this study were pastors of congregations ranging from 600 to 5,000 members. Therefore, they possessed a unique understanding, perspective, and experience of senior pastor transitions. Some of the study's findings may be generalized to other pastoral transitions but will be limited in scope due to the participants' criteria and context. Readers who desire to generalize some of the particular aspects of these conclusions on pastoral succession and continuity planning should test those aspects in their particular context. The results of this study may also have implications for churches in writing an emergency succession plan, in addition to a planned succession. As with all qualitative studies, readers bear the responsibility to determine what can be appropriately applied to their context.

Chapter 4

Findings

The purpose of this study was to discover how senior pastors create organizational continuity through succession planning. The assumption of this study was that senior pastors who have developed a succession plan and implemented that plan in their transitions would have experiential knowledge, wisdom, resources, and suggestions for best practices in building organizational continuity and reducing congregational anxiety throughout the transition process. To examine these areas more closely, the following research questions guided the qualitative research:

1. How do senior pastors seek to create organizational continuity before their transition?
2. What are challenges of succession planning?
3. What are essential elements of the succession planning process?
4. What are strategies that could reduce the organizational anxiety that congregations experience in successions?

Introductions to Participants and Context

The researcher selected seven prominent church leaders integral to their church's successful succession process to participate in this study. All names and identifiable participant information have been changed to protect their identities. Four churches are represented by the seven participants, and all the participants noted that their church experienced a successful transition.

Each of the four churches had prominent senior pastors in their mid to late 60s retiring or transitioning from decades of full-time ministry. Half the transitioning senior pastors remained on staff post-transition in reduced roles, and the other half received an emeritus status, continuing ministry through alternative means. All the transitioning senior pastors remained present in the life of their church, post transition, either as an employee or faithful Sunday attendee. Each of the four churches examined had senior pastors who were well self-differentiated.

Participant #1 – Patrick

Patrick is the Pastor of Discipleship at Skyline Church, which is located on the east coast. In his free-time, he enjoys exercising, reading history, and is a member of the church's teaching team. He is currently working on his Doctor of Ministry degree, studying practical theology. He is in his late-thirties and joined his church's staff a little more than a year before the church completed their 22-year succession plan. Before Patrick accepted his pastoral call, he was made aware of the planned transition and was considered by outside observers to be a succession candidate. Patrick knew the transitioning senior pastor, Peter, and the selected successor, Ben, before joining the church. He is still on staff providing stability, encouragement, and support to Peter and Ben, who are working well together.

Participant #2 – Jim

Jim is a former business executive in his late 60s who assisted with the design and development of Skyline Church's succession plan. He served as its executive director. Through research, travel, and personal experience, Jim carefully collaborated with Peter, the former senior pastor, key leaders at his church, and a variety of notable pastors

around the United States to craft detailed aspects of a multi-year transition plan. His close relationship with Peter and key leaders on staff enabled him to influence their multi-year transition process. Jim remains on staff in a reduced role, post-transition. His reduced role was part of the church's strategic transition plan to reduce some of the older staff's power and authority, coinciding with the timing of the senior pastor's transition. These additional transitions created more space for new and younger leaders to rise within the church.

Participant #3 – Peter

Peter is the former senior pastor of Skyline Church. He is in his late 60s and faithfully served his church for over four decades, serving hundreds of staff and thousands of congregants. He stepped down as the senior pastor in 2019 but remains on staff at the church. Peter has purposefully diminished his presence and scope of authority on staff to create space for Ben, the new senior pastor, to lead and grow. Peter is a life-long learner, humble, wise, and practical in nature. He has a robust knowledge of organizational leadership and spends some of his time consulting pastors and churches around the country.

Participant #4 – Edwin

Edwin is the senior associate pastor at Parrish Church, which is located in the mid-west. He is in his early 60s, has an M.B.A and a Masters of Divinity. He served with Murray, the former senior pastor, in a co-pastor model and currently serves alongside the new senior pastor, Mark. Edwin led in the research, planning, and execution of their multi-year succession plan and continues as a gifted administrator, leader, and mentor to the church's staff.

Participant #5 – Murray

Murray is the former senior pastor at Parrish Church. He served in that role for over two decades. He is currently in his late 60s and works at the same church in a part-time role, ministering to the elderly. He enjoys hiking, reading, and spending quality time with his wife, children, and grandchildren. Edwin assisted Murray in his succession planning process, partnering, planning, executing the plan. Murray is a gentle and wise leader.

Participant #6 – Tim

Tim served as the senior pastor of Grace Reformed Church for over four decades. He retired as pastor emeritus in 2019 and continues to share his pastoral wisdom with young ministers around the country, including his successor, Kevin. Tim is in his early 70s, grew up as a pastor's kid, became a pastor himself, and has a son who is a pastor. He has preached sermons on five continents, and his sermons have been viewed and read in countries as far as China, Poland, and Australia. Tim has been deeply involved with his denomination and the denomination's seminary for many years. His family has made a generational mark there, and he continues to further that legacy.

Participant #7 – Max

Max is the executive director at Redemption Church. He is in his early 60s and has served as the moderator of his denomination, as well as the COO of a large denominational agency. He has served pastors, churches, and missionaries all over the world for many years. He currently lives with his wife in the north east and has three grown children, and three grandchildren. Max assisted Jack, the former senior pastor,

with his succession plan, equipping not one but three successors to align their succession plan with their theological vision. Instead of the church becoming a mega-church, Max and his pastoral staff planted three churches to actualize their vision for impacting their city.

Creating Organizational Continuity

The first research question asked, “How do senior pastors seek to create organizational continuity before their transition?” The first set of protocol questions for this RQ were as follows: In what ways did the senior pastor prepare the church for transition? What role did the senior pastor play in the succession planning process? What values shaped the succession process the most? What pre-transition decisions positively impacted the succession planning process? How did the church identify what would stay the same and what would change during the succession planning process? What strategies should a church put in place before a succession planning process? What role did the church’s mission, vision, and values play in the creation of the succession plan?

The following themes emerged from the participants’ answers: the role of the outgoing senior pastor, process alignment, and organizational flexibility.

The Role of the Outgoing Senior Pastor

All the participants either explicitly or implicitly shared that the outgoing senior pastor was the most significant person in the succession planning process. It was understood that the outgoing senior pastor not only approved of the succession planning process but significantly participated in lifecycle of the process.

The Key Driver of the Succession Planning Process

Patrick stated with conviction that Peter drove the succession planning process 100 percent at Skyline Church. He mentioned that Peter had additional help from friends, mentors, consultants, and the church's senior leadership team but emphasized that he had things planned out twenty years in advance. Jim agreed with Patrick's assessment that Peter was the prime driver of the succession process. He said, "From all of my research, visiting twenty significant churches around the country, it became clear that these things only work when the senior pastor is owning and driving the transition process." Jim also added, "The transitioning senior pastor also has to be treated well in the process," noting the disproportionate power the transitioning senior pastor has to heal or wound the congregation in the process.

Jim shared that Peter was deeply influenced and mentored by men in the Leadership Network, along with Peter Drucker, considered to be the father of modern-day management. He said their voices, among others, likely shaped his own thoughts about his long-term transition, which turned out to be twenty-two years long. Peter concurred, mentioning that he wanted to drive the transition planning process because he had thought extensively about it through the years. Peter said, "I knew if I started planning for my eventual transition early on, we'd have a longer-off ramp to plan it out well." He noted that he had seen too many transitions go wrong, and those memories motivated him to do a better job.

Max noted that Jack had contacted Peter and a few other senior pastors about their church's succession plan and understood that he was integral to the entire process. Max

shared that by the time he came on staff, he knew that Jack had been thinking about his transition in terms of the church's transition years before a constructed a long-term plan came to life. Max mentioned that Jack's theological vision for the church was a key lens through which the succession process was being viewed.

Tim admitted that he drove the transition process at Grace Reformed Church and wanted the congregation to know that he was not getting pushed out. He stated that he said from the pulpit that the succession plan was his idea and that he was looking forward to stepping back. Tim emphasized that he had seen too many pastors stay too long for financial reasons and lack of self-awareness and did not want to repeat that narrative.

Discussing Succession Planning Years in Advance

All the participants mentioned that a critical piece of their church's transition success was due to the fact that the senior pastor had discussed the need to create a succession plan many years in advance of initiating the process. Patrick mentioned that by the time he had come on staff, Peter had been openly discussing his transition plan with staff for about fifteen years. He added that the church didn't know the specifics of his plan but that they knew there was a plan in place. Peter reinforced Patrick's experience, stating, "I started thinking about my transition twenty-two years before formally passing the baton on to Ben." Peter said that he's the type of guy who sets goals and to accomplish them, works backwards step-by-step to reach them.

Edwin noted that he and Murray began discussing the need for a successor around 2016, which turned out being a handful of years in advance of their formal transition. He said, "The issue naturally came up as we began looking to the future of Parrish Church,"

adding that “Murray’s age and health played a role in those discussions, but really it was our long-term strategic planning that necessitated succession conversations.”

Max mentioned that at Redemption, Jack had been talking about the theological vision of the church since its inception, but that formal succession discussions began around 2009 or 2010. Max said, “Informally we had been discussing our future transition plan for years, but we began to bring the process to life around 2010,” which turned out to be about seven years in advance of the transition date. He said, “We wanted to avoid an abrupt change so we planned the transition to happen in phases over many years.”

Diminish Presence Overtime

Three of the participants emphasized the importance of the outgoing senior pastor, slowly diminishing his public presence and authority as a key factor of their transition’s success. Patrick said, “Peter intentionally diminished his voice over time, to make space for the church to hear more voices from the pulpit.” He added that even after the transition, as he remained on staff in a smaller role, he didn’t publicly set foot on stage for at least six months. Jim agreed that Peter’s decision to slowly fade into the dark was brilliant. Jim mentioned that the year before Ben was formally selected as Peter’s successor, each led 50 percent of the time to transition the elders and internal staff to a new voice. Jim said, “It not only showed support for Ben, but it also showed any possible dissenters that the current senior pastor was 100 percent for his successor.” Jim noted, “Peter masterfully faded his very public status for the good of Ben and the church, and it was a beautiful sight to see because most leaders don’t have the emotional intelligence to do that.”

Max reiterated the benefit of this intentional action stating that Jack purposefully started preaching less, for the same reasons as Peter. Max mentioned that Jack understood that to reach more pockets of the city, diverse voices would need to be heard from the pulpit to attune to the needs of the people. Max also added that the congregation needed to be slowly weaned off Jack's voice since he's a once-in-a-generation communicator.

Edwin and Murray stated that they took the same approach in their transition process but mentioned that empowering the other members of their teaching team was the main motivator. Murray said it was a joy to be less essential to the operation, stating that their staff believed in a shared responsibility of the future of the church. Murray said, "It wasn't all on me, therefore our team leadership model shared the load of collective preaching, teaching, and decision making." He said that he had begun to reduce the centrality of his senior pastor position before the transition process began but that the transition process deepened his efforts.

Retain the Former Senior Pastor in a Reduced Role

Some churches made the strategic decision to retain their outgoing senior pastor on staff by transitioning them to reduced roles. Participants noted the benefits as retained institutional capital and leadership stability for staff and congregants. Both senior pastors are self-differentiated individuals, who have a deep knowledge of themselves, their family of origin, and exemplified high degrees of self and social regulation. These two senior pastors understood the consequences of remaining on staff and worked to avoid real and perceived connections of conflict of interest.

Peter mentioned that one aspect of his transition plan was to find a different role for him on staff. He said, “The plan was for me to stay on staff but in a reduced role.” He added that the leadership team planned a six-month sabbatical for him to just be gone for a while, providing space for the new pastor to settle in. But Peter said when he returned, the idea was to simply assist another ministry within the church but not have a prominent role publicly. Peter emphasized that the only way this can happen is for a former senior pastor to be 100 percent for the successor and to cheer him on 100 percent of the time. He added, “My diminished presence, along with some older staff, who have remained, but also transitioned to reduced roles, provided staff stability, while maintaining cultural capital and trust in the system, which allowed younger leadership to truly take the helm, with a safer and longer on-ramp.”

Murray said the same, sharing that he wanted to stay on staff in a reduced role to allay the fears of the older generation, as well as tend to their generational needs. Edwin concurred, saying, “Nobody wanted to lose Murray, not even Mark.” Murray had a wonderful friendship and relationship with Mark, and that made his retention possible.

Process Alignment

Several of the participants noted that their church’s mission, vision, and values provided guidance in the succession planning process.

Alignment with Mission, Vision, and Values

All the participants mentioned that their church's mission, vision, or values deeply impacted their succession planning. Participants either mentioned it explicitly or alluded to the fact in various aspects of their plan.

Patrick mentioned that every year, Peter reminded the staff and congregation about our church's mission, vision, and values. He added, "Peter did that to remind the church where they were headed and how all of the ministry operations, events, plans, and programs fit into that vision." Peter said, "Our church always had a ministry plan and when it came time to begin writing a succession plan, we knew it had to be aligned with our ministry plan and vision." He added that a directionless or non-aligned church cannot successfully hire another senior pastor if it doesn't know where it wants to go.

Max said, "The vision of Redemption was baked into the culture of the church, and so the succession plan flowed directly out of it. Jack did a great job keeping the theological vision front and center in the change process, explaining how the transition fit in the church's larger objective." Max mentioned that Redemption was always committed to church planting and multiplication, and the decision to incorporate that DNA into the succession plan was well received even though it meant navigating three new churches and three successions, rather than one.

Tim added that at Grace Reformed, the session reflected on their history and then created a legacy document to aid the church and the eventual successor. He said, "We wanted to write down our history, theological views, and values in order to protect the church from hiring a man who didn't value the same things that we did." Tim explained that they discussed the convictions they wanted to continue, as well their corporate

weaknesses, so that the search committee could speak honestly with candidates about who they were and more specifically what they were looking for. Peter described this phenomenon as matching the “non-negotiables” of the church to the transition process.

Hire Potential Successors with Mission, Vision, and Values in View

Some churches mentioned that their mission, vision, and values impacted their hiring practices. Jim said, “At Skyline, we have a clearly defined mission statement, vision statement, and set of values that our succession plan had to align with, as well as our candidate search.” He knew that stability and missional continuity demanded they hire a candidate who embodied their existing mission, vision, and values. Jim also mentioned that a potential successor had to have had a track record of living our four values: integrity, faith, truth, and love.

Peter affirmed Jim’s statements, noting that they knew Ben was the right guy for Skyline because he loved and embodied the culture of their ministry. He said, “Ben told us plainly that he didn’t want to change the culture of the church but that he loved the current culture and wanted to sustain it into the future.” Peter noted that the senior leadership team thought that would work well, and he said, “It certainly reduced the level of change that could have occurred if we had brought in an external successor who didn’t buy in to what we’ve been doing for forty-two years.”

Murray agreed, saying “For Parrish to hire a new successor, he had to fit the mold of the church.” Mark, Murray’s successor, came on staff ten years before becoming the senior pastor, and Edwin and Murray mentioned that Mark embodied the church’s values, making his selection unanimous among the session and search committee.

Organizational Flexibility

All the participants mentioned that the succession planning process was an intense change process that required creativity and flexibility on the church's part. Several participants noted that team leadership dynamics aided their capacity to create, manage, and sustain ministry continuity throughout the process.

Create a Planning Team

All the participants mentioned that they had informal and formal discussions about their church's transition plan with a small group of trusted individuals years before creating a succession timeline. All the churches had some form of planning team established. Jim said, "I had learned from a few churches that it might be wise to create a planning team to discuss significant parts of the transition plan years in advance of the actual transition. This planning team wasn't large and consisted of a few senior staff and trusted leaders who had experience with transitions. Each year we would review our long-term succession plan and emergency succession plan to make sure names and processes were updated and aligned to our mission, vision, and values."

Edwin, Murray, and Tim mentioned that their succession planning team was their elder-led session. They all made note that their succession planning discussions originated from their long-range church planning discussions. In both of these churches the participants stated that there was a high degree of transparency, trust, and respect among the members of the session, which created a psychologically safe environment to discuss succession planning years in advance without reprisal.

Creating a Teaching Team

Several participants mentioned that they had created a teaching or preaching team to prepare for their succession planning process. All the participants mentioned the beneficial impact that team teaching and preaching had on the congregation.

Patrick mentioned that Peter had created the teaching team at Skyline to provide the congregation with a greater diversity of voices and to diminish congregational dependence on his voice. Jim said, “It was one the best moves we made pre-transition.” The teaching team model provided Peter breaks, it enabled the congregation to hear multiple voices, and it afforded opportunities to evaluate internal candidates over a long period of time. Peter affirmed Patrick’s and Jim’s thoughts, adding that the decision was a result of their transition planning discussions. Peter said, “Having a teaching team, rather than a main preaching pastor, created more stability for the church as a whole, and we made that change years in advance of my transition, but when it came time for my transition, we discovered that it was a key stabilizer for our church, and it still is today.”

Edwin and Murray agreed, sharing that if the church has a few pastors on staff, there ought to be a shared sense of responsibility between the pastors of the church, preaching, teaching, and leading, rather than a single person assuming that sole responsibility. Murray mentioned, “We discovered the beauty of team leadership because I’m not a strong natural leader, and I need to have people around me who have exceptional leadership capabilities, otherwise my narrow band of gifts will not help our larger ministry.” He said that their pastoral staff flourished as a teaching team because they were doing joint exegesis, brainstorming sessions, and pulpit rotations. Edwin

concluded, stating that their team leadership model created a collective ownership of the future and not just of the pulpit, which provided many internal benefits.

Max mentioned that they took the same approach at Redemption years before Jack's transition. He said, "As Jack was planning his official transition and helping the church transition from one church to three churches, he intentionally shifted his preaching model to reduce the centrality of his preaching on Sundays. He began preaching at all three of their church locations, alongside the three newly hired lead pastors. Max mentioned that their model worked well, but many visitors traveling to hear Jack were not pleased with the variability. Max said, "We would not advertise where Jack would be preaching on a Sunday but that he would preach in partnership with the lead pastors at one of the newly formed churches each Sunday."

Tim was the only participant who maintained a majority of the church's preaching responsibilities prior to transition. Tim mentioned that he preached the large majority of the sermons and believed the other two staff members were not strong orators at the time. Tim admitted that Kevin probably preached five or six times a year prior to his selection.

Flexibility with the Organizational Chart

All the participants either explicitly stated or implied that the organizational chart was rearranged as a part of the succession planning process. Several noted a willingness on the part of the staff and session to be flexible with staff roles and job descriptions post-transition. Edwin mentioned that establishing the team leadership model shifted the culture of leadership at Parrish, enabling the conversation around rearranging the organizational chart to suit the strengths of the various pastors. He said, "We could

shuffle the job descriptions of the pastors within reason, basing them on their individual strengths and experiences because we were truly a team, that was co-dependent on one another.”

Max mentioned that the process of discussing a decentralized church transition model necessitated another conversation around flexible staff roles and responsibilities. He said, “The scale of change going from one church to three churches made static job descriptions impossible.” Max admitted that the change process required a high degree of organizational flexibility rethinking the organizational chart, roles, and responsibilities.

Creative and Adaptive Problem Solving

All the participants mentioned unique contextual challenges that arose due to their transition and that creative problem-solving skills were required to solve them. Some provided examples. Murray mentioned that prior to his transition, Parrish Church was growing rapidly, and due to the growth, they were planting a daughter church. Murray shared with his session that he desired to leave Parrish temporarily to help establish their daughter church. Murray said, “Our team leadership approach came in clutch in this situation and really allowed me as the senior pastor to go assist our church plant for time and then to come back.” He stated their organizational flexibility and relational trust enabled them to be adaptive to a wide range of problems. Murray said that by the time of his transition, their team model had been thoroughly tested and seasoned. He noted that their internal principle to hold on to staff, develop them, and their willingness to change their job descriptions within reason led to an incredibly stable environment pre- and post-transition.

Tim mentioned that to prepare his congregation for the eventual end of his four-decade ministry, he had created a sermon series to talk about the transition and the future of the church. Tim said, “I wanted the church to hear that the next pastor will likely sound, think, and act differently than me and that it would be ok.” He noted that his intention was to slowly prepare them for the inevitable transition that would occur within the next year. Tim shared, “I needed to be candid with the congregation about the change process and prepare congregants to not be unduly upset.” Tim recognized that his church was not adaptive to change and that his church would likely struggle under a younger leader if the change was quick and abrupt.

Strategic Staff Transitioning to Create Space

Some churches experienced widespread staff transitions that coincided with the senior pastor transition. Patrick mentioned that Peter had been transitioning out key leaders from his generation to make room for newer leaders. Patrick said, “He was strategic in how he did it. He didn’t move too fast, or too many people, but thoughtfully added new faces and voices to the leadership team to smooth out the eventual succession process.” Jim added that he was one of the older staff members and that he had a voice in the process and agreed that reducing the authority and scope of some of the older leaders was vital to transition process. He said, “Not only did we need to make room for newer and younger leaders on the senior leadership team, staff and session, but we also had the challenge of having a bloated workforce.” Jim described that they took intentional steps to reduce the church staff through attrition over a few years before Peter’s transition. This

reduction lowered their staff overhead, anticipating a common drop of 20 percent in giving and attendance when a senior pastor transition occurs in the life of a church.

Summary of Creating Organizational Continuity

The first research question asked, “How do senior pastors seek to create organizational continuity before their transition?” The following themes emerged from the participants’ answers: the role of the outgoing senior pastor, process alignment, and organizational flexibility. The role of the outgoing senior pastor included recognition that the each is the key driver in the succession planning process and that it is vital that each discuss succession planning years before their transition. Outgoing senior pastors must also diminish their presence on staff, ramping down their roles and responsibilities, in parallel with new senior pastors ramping up theirs. It is also possible to create additional organizational stability by retaining former senior pastors post-transition if they are self-differentiated.

Process alignment included aligning the succession planning process with the church’s mission, vision, and values, as well as ensuring that the hiring process of best-fit candidates incorporated them. Organizational flexibility included creating a planning team, a teaching team, flexibility with the organizational chart, becoming creative and adaptive problem solvers, and strategically transitioning additional staff to create more space for the new senior pastor.

Challenges to Succession Planning

The second research question asked, “What are the challenges of succession planning?” The second set of protocol questions for this RQ were as follows: What personal challenges did the senior pastor experience, planning and executing the succession plan? What external challenges did the senior pastor experience, planning and executing the succession plan? What issues did the church staff run into during the succession planning process? What barriers did the church leadership remove for ease of transition for the new senior pastor? What barriers were identified but remained for the incoming pastor to overcome post-transition? What challenges expended the most resources? Was counsel utilized to help problem solve challenges, issues, or barriers?

The following themes emerged from the participants: an organizational sense of loss, additional challenges, and contextual challenges.

An Organizational Sense of Loss

All the participants mentioned that the discussion, planning, and executing of the succession plan was disruptive to the life of the church. A collective sense of loss and anxiety was experienced by the congregation due to the change management process.

Change Equals Loss

All the participants mentioned communal feelings of loss and uncertainty in the succession process, but they did not change course because of the communal sense of loss, and instead they recognized the cost of change and continued through the process to completion. Patrick mentioned that there was a lot of sadness at Skyline when Peter made

it official that he was stepping back. He said, “We were not rocked to the core but we certainly had some key people leave, some were angry, and there was a lot of sadness, because of the change.” Edwin explained that Parrish expressed the same feelings about Murray’s transition during their town hall meetings during the succession process. Edwin said, “That sense of loss would have been stronger than it was for many older congregants if Murray hadn’t stayed on staff post-transition in a new role.”

Loss of DNA in Transition

Several participants alluded that the succession planning process caused either staff or congregational anxiety. A commonly experienced fear was the loss of the church’s DNA with the loss of their long-tenured senior pastor. Max mentioned that at Redemption, this feeling was pervasive. He emphasized that the decentralizing of the entire church system from one church to three naturally brought lots of hesitancy. He said, “As we pursued our desired end state of the transition process, the concern about losing our church DNA came up frequently from the staff and the session. Max mentioned that Redemption had a culture that was thoughtfully created and curated over time and that it was something they collectively wanted to hold on to in the transition.

Loss of Voice

All the participants expressed a thoughtful inclusion of multiple voices in the succession planning process, which created a communal sense of buy-in, but some mentioned that specific complaints of not being heard arose in their succession planning process. Each instance was unique but expressed the common fear of not being heard.

Patrick explained that the succession planning process at Skyline was inclusive of senior leadership voices, outside voices, expert voices, the session, and staff, but one voice he recognized wasn't heard as well as it could have been was the congregation's. He said, "I think we missed was giving the congregation a voice during the process. When we had a congregational meeting to announce Peter's successor, we never gave the congregation a real chance to ask any questions." He explained that Peter seemed nervous, and when it came time for congregational questions during the congregational meeting, Peter shut that part of the meeting down by jumping in lightning quick. Patrick noticed, "There were a few people who were raising their hands to ask a question about the process, but then Peter quickly stood up and moved on, which was something I worried might bite us in the butt later." He added that they needed to let the room breathe and hear their thoughts since it impacted their lives as well.

Tim mentioned a different challenge, explaining that he was the source of that problem. He said, "I made the decision not to participate in the hiring process of the new senior pastor. I was worried that the length of my tenure would impact seeing what the church needs now, rather than what it needed when I was originally hired." He added, "The world is a lot different than when I started in the pulpit, and I regret that decision to be silent because I likely wouldn't have made the choice that our search committee made.

Additional Challenges

All the participants mentioned that the succession planning process created the need for additional organizational changes. Several noted a domino effect that they experienced due to the succession planning process.

Denominational Polity

All the participants mentioned that their denominational polity was a hindrance to their succession planning process. Most churches honored the denominational process provided for them but worked around the obstacles created by the prescribed steps.

Peter mentioned that the biggest challenge was sticking to the rules of the Book of Church Order (BCO). He said, “The BCO calls for the creation of a pulpit committee, which is commonly filled with well-meaning congregants and church leaders who have never been on a pastoral staff or been senior pastors themselves.” He explained that the BCO expects these congregants to be able to analyze and suggest a best-fit candidate for a position they know little about. Jim agreed, mentioning that the current process is deeply flawed. He said, “Most committees do not have the proper training or coaching to do the job that a pastoral head-hunter or professional search firm could do.” Peter expanded on the challenge saying, “Pastors are not taught how hire, fire, or search for their future replacements; therefore, we’re systematically set up for failure.”

Tim agreed, noting that his biggest challenge with the succession planning process was the denominational structuring of the hiring process. He said that his denomination calls him to elect a search committee filled with diverse congregants and leaders, who are tasked with the job of searching for, evaluating, and installing his replacement. He said, “These people have never been senior pastors and do not fully understand the unique nature of the role.” He explained that he didn’t fault them for their lack of knowledge and understanding but assented that the polity sets them up for failure asking them to accomplish a task they will rarely get right. Tim said, “My biggest regret was not speaking into the process more and sharing what I know.” Tim and several of the

participants noted that the democratic process looked good on paper but was nothing more than a hindrance to finding a best-fit candidate.

Senior Pastor Transitions Multiply Change

Several participants mentioned that planning the transition of the senior pastor triggered successive changes in other areas of the church. Patrick noted that the session made several systematic changes because of the succession process. Edwin mentioned, “When we started looking at our succession plan in 2016, nobody wanted to retire, so we knew it would require more flexibility and creativity shifting the organizational chart around when the transition came in order to retain most of us, but we were ok with that.”

Max realized that decentralizing their entire church ministry model from one big church with multiple worship sites down to three separate churches would stir up a lot of anxiety about job safety. Max said, “I could empathize with them because my role as a central administrator was going to be significantly changing too.” Max added that there weren’t many layoffs, but there was a lot of communication and creativity to rewrite or adjust job descriptions for staff members.

Tim shared that their staff experienced an additional change, which turned out to be messy but necessary. He said, “We had an associate pastor who had been with the church for two decades and knew he had been underperforming for years, so we came to the conclusion that we needed to let go of him in preparation of the senior pastor transition.” Tim explained that the session didn’t want to saddle a young new pastor with a long-term associate who wasn’t pulling his weight so they decided to clear the decks for him. He said it was painful process but a necessary one for the future state of the church.

Hiring Potential Successors

All the participants mentioned that their church experienced challenges in the hiring process. Patrick mentioned that Skyline had hired a few potential successors during the twenty-two-year span of succession planning. Peter added that they had hired between seven and eight potential candidates during that span, watching and evaluating them over their tenure. Peter said, “It was a trial-and-error process that took place many years, and to be honest the process could have failed if Ben hadn’t been the guy.”

Max mentioned that Redemption’s biggest challenge was phase one of the transition process, which was the hiring of three new lead pastors. Max said, “It was a lot of intense change, hiring and empowering three lead pastors of three different congregations all at once. We knew it would be an intense change management process examining our internal candidates, while conducting searches for potential external candidates.” He expanded, saying that the real challenge was tripling everything they did.

Lack of Clarity for Staff

Some participants noted a lack of job description clarity during the succession planning process. Patrick noted that they had a robust organizational chart with droplines, depicting clear lines of authority and scope, but even with that, there was still a lack of clarity about shifting roles post-transition. Patrick admitted, “My role was one of those that lacked clarity, and the transition brought more ambiguity regarding my authority, role, and set of responsibilities.” He said, “If there had been more clarity, that would have lowered the temperature.” Max shared a similar perspective noting that as they were

addressing a thousand moving parts in their church decentralization process, that updating many job descriptions slipped through some cracks early on.

Contextual Challenges

Each of the participants mentioned contextual challenges that pertained to their specific succession planning process.

Decentralizing One Church to Three Churches

Max mentioned that Redemption's biggest challenge was taking a centralized church operation and fully decentralizing it over the span of a few years. He said, "We had to decentralize hundreds of community groups, finances, services, fee-based ministries, staff, and more." He noted that even with years of intentional planning, it was incredibly hard to do.

Depreciation of Assets

Some churches discussed their depreciating assets as challenges for the incoming successor. Jim said, "One barrier that we wanted to address before the transition was our church building." He likened their church building to a car, which slowly depreciates and falls apart over time. He said they "created a separate sinking fund years before the transition to fix up old, breaking, or deteriorating parts of their facilities. Jim explained that they did not want to hand tie or sabotage the incoming pastor with a building that was a ticking time bomb.

Murray mentioned the same challenge but admitted his failure to address it years before the transition. He said, “For twenty plus years, I was sending money out of the church towards good things, but I failed to take care of the infrastructure of our church during that same time period.” Murray expanded his thoughts, saying, “As I stepped down, I realized that I was gifting Mark millions of dollars of repairs. I didn’t see it. How did I miss this?” Murray noted that it was a humbling misstep handed down to Mark.

Fee-Based Ministries

Some churches mentioned that they had fee-based ministries attached to their church, adding an additional challenge prior to their senior pastor succession. Jim noted that Skyline had two major fee-based ministries with a substantial connection between those ministries and the church. He said, “We didn’t want the new senior pastor to be stuck having to support those ministries in case he and the leadership team wanted to allocate resources in new ways.” The school and camp had thousands of kids attending them, he said, so it wouldn’t be an easy decision to sever official ties, but he said they did it for the good of the future state of the church. He explained that they “created a ten-year plan to slowly ramp down and reduce their financial obligation to them in a tiered way.” This incredibly wise plan, however, made a lot of people angry, but they both admitted that it was the right decision for the long-term health of the church and its senior pastor.

Summary of Challenges to Succession Planning

The second research question asked, “What are the challenges of succession planning?” The following themes emerged from the participants: an organizational sense of loss, additional challenges, and contextual challenges.

An organizational sense of loss included notes that change equals loss, even the loss of DNA in transition, and the loss of voice. Additional challenges included denominational polity, senior pastor transitions multiplying change, the difficulty of hiring potential successors, and the lack of clarity for staff in transition. Contextual challenges included decentralizing one church to three churches, the depreciation of assets, and severance from fee-based ministries.

Essential Elements

The third research question asked, “What are essential elements of the succession planning process? The third set of protocol questions for this RQ were as follows: Who were key people that helped to drive the succession planning process? Was a timeline created? How was the succession timeline established? What were some key milestones on the timeline? Did the church have an emergency succession plan? Did the church have a communication plan? What role did leadership development play in preparation for succession? How were potential candidates identified and assessed? What events were significant in the succession planning process?

The following themes emerged from the participants’ answers: leadership development, key people, key plans, and best-fit considerations.

Leadership Development

All of the participants valued leadership development and had either a formal or informal leadership development process for their pastoral staff. All four of the churches hired successors were mentored by the outgoing senior pastor.

Develop Internal Staff

All the participants agreed that internal candidates would fare better than external candidates at their churches. They mentioned that their churches valued developing younger pastors and leaders.

Patrick said that Skyline brought Ben on staff about three years before being internally selected as Peter's successor. Patrick mentioned that Ben was "slowly brought into the innerworkings of the church so that he could get acclimated to the people, processes, culture, and behind the scenes organizational work." Jim affirmed Patrick's comments, saying, "Peter was constantly developing leaders all around him." Jim explained that the senior leadership team was well aware of the need to develop top talent, retain talent, and position talent in the right roles, in the right seasons of life. Jim admitted that Skyline had a tremendous HR system that aided their succession planning process. He said, "We had an internal pipeline of viable candidates for over the twenty-plus years, that could have been good fits, but ultimately, we were looking for a great fit."

Murray shared that when Parrish faced the reality of finding a successor for him, the session asked, "Who will fill the void?" Murray stated, "We will look for God's parade of providence," meaning the session should be looking at age, gifts, leadership, maturity, and culture. Murry said, "By God's providence, Mark was already on staff, and was the right age, with the right gifts, abilities, and had come to our church as a staff member at the very same age that I did." By the time Mark became senior pastor, he had been on staff for about ten years. Edwin and Murray said they could tell within a few years of watching him that his capacity to lead was huge. Murray admitted, "One thing that is unique about Parrish is that we don't write job descriptions before we hire, rather

we hire the right people and form the job descriptions around their strengths, so that their gifts can prosper.”

Max said two of the three new lead pastors came from their staff. He said, “They were internal hires, and the third lead pastor was previously a senior pastor that we knew and loved who came to us out of state.” Looking back, Max noted that two of the three lead pastors burned out, leaving their position after a few years, and that currently there was only one of the original three pastors still in office. Max noted that this specific pastor had been with the church from its origin and deeply understood the culture of the city and Redemption Church.

Tim mentioned that his successor, Kevin, had been on staff as an assistant pastor for about five years before being selected by the search committee. Tim noted that there was not a formal leadership development plan laid out for Kevin but that he had personally disciplined and mentored Kevin and other previous pastors on staff. Tim explained, “There was a lot of informal mentoring over the years but nothing formal.”

Mentored Successors

Several participants noted that their selected successor had been mentored by the outgoing senior pastor. All four of the examined churches had successors who had been on staff for at least three years before being named the next senior pastor.

Patrick noted that Skyline was looking for a specific DNA, and that once Peter found that candidate, he spent years mentoring him. Peter agreed, stating, “I had the privilege of mentoring Ben from a young age.” Peter had a longtime friendship with Ben’s family, which afforded him an opportunity to know him and mentor him over the

years. Peter said, “When Ben was younger, the mentoring was informal and infrequent, but when he came on staff, I was able to spend more quality time with him.” Peter admitted that when Ben came on staff, he did not think he would be the guy, but after four years, the leadership team became convinced he was the right guy for the job.

Edwin mentioned that Murray’s successor, Mark, was on staff for about ten years before he was named senior pastor. Edwin would not say Mark was formally mentored by Murray but that he was informally mentored by him and many others on the teaching team. Edwin explained, “We were a team in the fullest sense, so Mark would have learned and absorbed a lot collaborating with us over the years.”

Max said, “Jack wanted to have at least three to four years mentoring the lead pastors before he stepped down.” Max explained that Jack’s aim was to spend regular time with those men and pour into them, transferring knowledge, sharing thoughts on theology, culture, decision-making, church mission, and the role of senior pastor.

Key People

All the participants stated that the elders of the church were influential voices in the succession planning process. Several also mentioned that they hired a professional consultant to advise them as an independent third party.

Elders and Consultants

All the participants mentioned that they collaborated with their church’s elders regarding the succession planning process. Several named elders who had significant

business experience as key voices in the process. Several churches worked with consultants for expert knowledge and to bounce ideas off of an independent third party.

Peter said, “The key leaders I worked with on the transition plan were on the leadership team.” He described them as elders and staff who had been around for a long time, people he deeply trusted. He elaborated further, stating they were a group of entrepreneurs, corporate America leaders, and some with just good logic.

Murray noted that many key people he leaned on were teaching and ruling elders. He said, “There was on particularly gifted elder, a businessman who pushed our session to consider the future of our church, including a succession plan.” He continued, saying that Parrish had some great organizational leaders within the church, including wise business leaders who helped them think and plan strategically.

Jim mentioned that Skyline’s leadership team connected with consultants and members of the Leadership Network to bounce ideas around. He said, “Their counsel was crucial in the early years because they had a lot of experience with transitions in businesses and non-profits and shared transferrable principles.” Jim expanded, saying that a few of those principles included financial counsel, emotional counsel, and general counsel to the outgoing senior pastor and his wife regarding next steps after the succession. The only regret Jim mentioned was waiting to hire a profession transition consultant to assist them in their process. He said, “Knowing what I know now, I would have hired a succession consultant years earlier.”

Edwin said that they never formally hired a consultant but were blessed to have a professional consultant in the church. Max mentioned a similar solution, saying, “We brought in a friend of the church, who happened to be a former McKinsey Consultant

who knew Jack, me, and others on staff.” Max mentioned that having a subject matter expert on hand enhanced the senior leadership’s understanding of the change management process. Max added that the consultant provided leadership coaching and consulting services to the leaders of the church.

Key Plans

All the participants noted that they created a succession timeline early in the succession planning process. Several created communication plans, and one created an emergency succession plan.

Create a Transition Timeline

All the participants mentioned they created a transition timeline early in the succession planning process. The duration of the timelines varied, but none of the participants completed their timeline milestones in under one year.

Jim mentioned that Peter started his transition process about twenty-two years before his actual transition date. He said, “Peter knew that most ministers have about forty years of full-time ministry in them so he calculated his transition date roughly based on that premise.” Peter added that the senior leadership team revisited their emergency succession plan and their long-term succession plan yearly in order to update them with new names and new details. He said, “The closer we got to my projected transition date, the more detailed our timeline became.”

Murray explained that one of Parrish’s elders was a gifted businessman and said if they were going to be serious about the future of their church, they needed to be planning

for succession five, ten, or fifteen years in advance. Murray admitted, “His comments were a shock to the system, but they were well received, and we took them seriously.”

Max said, “We strategically planned to make our church and senior pastor transition simultaneous in order to align our transition plan with Jack’s theological vision but we did it over several years.” He shared that they started working on their official timeline in 2010, which was seven years before Jack officially stepped back in 2017. Max said they had some benchmarks and milestones on the timeline but mentioned that their dates were flexible. He said, “We had three phases and dates to match the phases.”

Create an Emergency Succession Plan

Several participants noted that creating an emergency succession plan was important, but only one said they had one. Jim mentioned, “In my research, I discovered that most of the twenty churches that I visited did not have an emergency succession plan, and we found that disheartening.” He said that after he heard that, Skyline created one, which they called their Mac Truck plan because it designated the immediate measures the leadership team would take if something permanent or semi-permanent happened to Peter. Jim said, “Our plan outlined the lines of authority, changes in the organizational chart, and staff shifts in roles and responsibilities that would need to take place temporarily.”

Create a Detailed Communication Plan

All the participants mentioned that they had either informally or formally created a communication plan that they embedded into the succession planning process. Patrick

stated he wasn't privy to all of the details of Skyline's communication plan, but he knew that they had one. Jim concurred, stating, "We had conducted a stakeholder analysis early on in the succession planning process and created a detailed communication plan to communicate with the different stakeholder groups at the appropriate times." He expressed that the Peter and the leadership team knew different groups of people would be impacted in different ways because of the succession. Jim said, "We addressed them group by group, laying out what we would tell them, how we would tell them, and what medium we would use." Peter added that their communication plan was stair-stepped. He said, "We identified the various stakeholders and created a tiered plan to account for the proximity of impact that each group would experience in the transition."

Edwin and Murray explained that they didn't have a formal communication plan but that they did target specific groups of people at different times, sharing certain levels of information with them. Murray said they had team meetings, session meetings, and eventually town hall meetings, "so we had an approach; it just wasn't written out in detail." Murray mentioned that the town hall meetings were informal opportunities for the session and staff to share information with the congregation and for the congregation to ask questions.

Max noted that communication was critical to Redemption's transitions. He said, "We had to have an incredibly detailed communication plan since we were transitioning an entire system, and not just a prominent staff member." Max shared that they had a staff member dedicated to communication, revealing how much valued it during the succession planning process.

Celebrations Mark Endings and Beginnings

All the participants mentioned having a celebration event or celebratory service for the outgoing senior pastor, marking his official end and the new senior pastor's beginning. Jim said, "We had a huge celebration for Peter and his wife at the end of his tenure, and it was the best worship service ever." He described the special event saying, "We just gave thanks, recapping major milestones in Peter's ministry, shared personal stories, and explained the transition process." Peter added, "It was a beautiful end and beginning, marking a new point in the life of our church." Patrick, Jim, and Peter noted it was a unique opportunity to celebrate the past and harness positive momentum for Ben.

Tim mentioned that Grace Reformed had a culture of celebrating significant milestones in the life of the church, pastoral staff, and elders. He said, "We had a grand party for my transition where they brought in friends from abroad, and as a church we looked back at photos, heard testimonies, and had one hilarious elder roast me as a parting gift." He described it as a wonderful time of recognition and acknowledgement.

Candidate Best-Fit Considerations

All the participants mentioned that their best-fit candidate was a culture fit who embodied the church's mission, vision, and values. They also stated that they wanted a younger candidate between the ages of 35-45.

Culture Fits

All the participants described their church's successor as a great culture fit. Several of the participants used the word, "culture-fit," while other used language to

describe the concept. Patrick noted that Ben was a different type of leader than Peter but agreed that they had same heartbeat. He said, “Ben fits the DNA of the church to the T, which is one of the reasons he was likely selected.” Jim agreed, saying “We knew we wanted somebody either currently in our system or who has been through our system.” He mentioned that they drew up concentric circles looking at current staff, past staff, summer interns, visiting preachers, and church planters from Skyline to get a range of proximity. Peter said the biggest part of succession planning for him was naming Skyline’s non-negotiables and making sure his successor embodied those non-negotiables. Peter explained, “He must be a culture or DNA fit but also value what the church values the most.”

Edwin mentioned that Parrish knew what they wanted in a successor and that he had to be a great culture fit. Edwin shared, “We have a deeply relational church, a big church, but it’s a sizeable church with a parish feel to it, and so our candidate had to be relationally gifted.” Max said at Redemption they didn’t have to find one successor but three, so they had to paint a clear picture of the desired future state of the church to match the needed skills to get there. Max concluded, saying, “We ended up hiring two internal candidates who fit our culture and one external candidate who we thought would fit it but ending up struggling.” Max explained that after five years, only one of the three hired lead pastors remained on staff and that the remaining lead pastor who remained had the longest tenure at the church of the three, embodying the DNA and culture of Redemption since the early 90s when he came to the church.

Young Generalists

All the participants noted that after long pastoral tenures, their churches hired someone between the ages of 35 to 45. Most noted that their successor had either been a former college minister or young adult minister and mentioned they were most interested in candidates who were generalists.

Jim mentioned that as the senior pastor gets older, so does the average age of the congregant. He said, “We knew the only way to drive that number down was to hire younger, and our aim was to reach that 35-year-old in the service. Edwin agreed, mentioning that Parrish knew they wanted a younger man, a next generation leader. He said, “We were a church that believed in investing in the next generation of pastors.” Tim also said that Grace Reformed valued long tenures of ministry; therefore, they desired to bring in a younger man to lead them and reset the clock.

Summary of Essential Elements of Succession Planning

The third research question asked, “What are essential elements of the succession planning process? The following themes emerged from the participants’ answers: leadership development, key people, key plans, and best-fit considerations.

Leadership development included data suggesting that churches develop internal staff, and that senior pastors should mentor their successors. Key people included church elders and professional consultants. Key plans included the creation of a timeline, emergency succession plan, communication plan, and a celebratory event or service to mark and end and beginning. Best-fit considerations included searching for culture fits and young generalists.

Strategies That Reduce Organizational Anxiety

The final research question asked, “What are strategies that reduce the organizational anxiety that congregations experience in successions? The final set of protocol questions for this RQ were as follows: How did the succession planning process reduce organizational anxiety? What strategies or decisions reduced organizational anxiety during the succession planning process? What leadership traits helped to bring a sense of calm during the succession planning process? What succession planning elements impacted the church the most? What succession planning elements aided a smoother transition for the incoming senior pastor? What strategies or decisions removed impactful barriers for the incoming senior pastor?

The following themes emerged from the participants’ answers: succession principles, timing, and staff dynamics.

Succession Principles

All the participants described empathy, transparency, and trust as anxiety-reducing traits that enabled the succession planning process to move forward year after year. All the participants who were former senior pastors exhibited self-differentiation as a leadership trait.

Principle of Transparency:

All the participants mentioned transparency as a key principle that reduced the collective feeling of anxiety for staff and congregants alike. Several participants explained that detailed information shared frequently led to fewer questions and less

expressed frustration. Murray mentioned that Parrish's session wanted everything on the table. He said, "If we are going to do this well, the staff had to be open books about the process with the session, and also share what they could at the right times with the congregation." Murray expressed that there could be no "smoking guns" or unspoken issues among staff members if the succession was to succeed.

Max said that Redemption took the same approach, being as transparent as possible about the transition process with staff and congregants. He said, "We didn't want people think it was a small group of people in a dark, smoke-filled room, making all of these change process decisions."

Principle of Empathy

Several participants mentioned empathy as a key response that reduced congregational anxiety during the change process. Max said, "Other than transparency, empathy was the key trait that calmed staff and congregational anxiety." He explained that having empathy for how the change was going to impact their people was significant. Max said Jack did a great job communicating empathy, and key leaders followed suit. Max mentioned that the transition was going to impact every facet of church life, therefore they understood the power of expressing empathy.

Principle of Trust

Several participants mentioned trust as a differentiating trait. Many of the outgoing senior pastors noted that they felt they needed to trust their successor to pass the baton. Patrick said, "I think having Ben on staff for about four years before being tagged

as Peter’s successor was critical for the staff, as well as the congregation.” He explained that by the time of the transition, all the staff loved and trusted Ben. Edwin had similar convictions, noting that Mark had been at Parrish for over ten years and that the congregation trusted him. Edwin said that was huge for Murray. Murray agreed, saying of Mark, “If we didn’t get a super-majority vote from the church, then Mark and I would leave together and start a BBQ restaurant.”

Self-Differentiated Leadership

All the participants shared information about the outgoing senior pastor that revealed him to be either moderately or highly differentiated. Differentiated pastors exhibit a high-degree of self-knowledge, self-regulation, clarity of personal values, and a capacity to analyze their internal state of being, while outwardly managing their outward disposition towards others.

Patrick described Peter as constantly giving up the pulpit to younger leaders so that he could help develop them. Patrick said, “Peter wasn’t insecure, needing to be seen, heard, or loved, and it really blessed our church and staff.” Patrick explained that many senior pastors around the country come across as insecure, over-functioning as preachers and teachers, when they could be building up their bench. Jim concurred, saying, “Peter understood himself. He had done his work, and he was not easily ruffled by others.” Peter added, “I’ve never been gifted pastorally, but I’ve spent a lot of time developing my capacity as a leader, as well as others.” He explained that it wasn’t preaching that got him excited but rather discipleship and ministry multiplication. Peter mentioned without

prompt, “Stepping down was not terribly difficult for me because I’ve been ready for something different, and I’m ready to be Ben’s biggest cheerleader.”

Murray described himself saying, “I’ve always known that I’m incredibly limited as a leader, and that’s why I surround myself with very capable leaders.” He explained that his knowledge of himself led him to be a team player. He said, “I function best with a team, combining our gifts, abilities, ideas, and experiences.” Edwin shared that Murray never wanted attention and that he was acutely aware of his strengths and weaknesses.

Tim mentioned, “Looking back on my tenure as senior leader of my staff, I know I failed them in many ways. For one, I never held staff meetings, and I didn’t want to be anybody’s boss.” Tim also noted that as he reflected on his ministry, he realized that he needed to clear the staff deck so the new pastor wouldn’t be stuck with an associate pastor who wasn’t pulling his weight. Tim said, “I wanted the church to know it was me driving this succession planning process, and clearing the deck for the new pastor, and that I wasn’t being pushed out.” He explained that he didn’t want the new pastor to take unnecessary hits that would likely come if he didn’t let go of a staff member and let the church know who was behind the hard transition process. Tim knew he was loved and absorbed temporary hardships for the sake of the church’s future.

Timing

All the participants mentioned timing as significant contributor in the reduction of congregational anxiety. They also mentioned that their succession planning process took over three years to complete. Several participants concluded that a multi-year planning approach was significant to their transition success.

Plan for Years, Not Months

All the participants mentioned that the succession planning process should take place over several years. Peter said, “How you time a succession matters because if you move too fast, you run the risk of creating more anxiety than there needs to be, and if you move too slow you run the risk of losing momentum with a lame duck.” He explained that timing was critical for diminishing congregational anxiety. Jim and Peter mentioned pairing transparent communication with a reasonable transition timeline as keys to success. They said, “Those two factors will reduce a lot of congregational anxiety.”

Staff Dynamics

Several mentioned that managing staff dynamics during the succession planning process was vital for organizational stability.

Public Support for Successor

Most participants mentioned that the outgoing senior pastor refused to say anything negative about their successor in public. Jim mentioned, “Peter might have had different thoughts from time to time in his head about specific decisions, but he never spoke an ill word about Ben in public ever.” Patrick and Jim shared that Peter was for Ben 100 percent of the time and made it clear to everyone that there were no hidden issues between them.

Murray noted that he would not contradict Mark in public, saying, “I practiced my statement that I loved my boss.” He explained that Mark was the senior pastor now, and

not him therefore he would never undermine his authority. Murray shared that his succession process was a clean process and that he wanted to keep it a clean.

Internal Candidates

All the participants mentioned that having their successor on staff before being selected as the next senior pastor was anxiety reducing. Patrick said, “Having Ben on staff really reduced our collective anxiety because Ben was a known quantity to the staff and the church.” Peter agreed noting that they tested this theory. He said, “We created an electronic voting process for our staff so they could vote anonymously yes or no about Ben.” Peter described the feedback as overwhelmingly positive, saying, “We had well over 100 affirmations he’s our guy and zero no’s.” Jim and Peter mentioned that it was important to the senior leadership team that the staff support Ben, and they got their answer with their vote.

Hire Potential Successors on Staff Years in Advance of a Transition

All the participants mentioned that they had hired their successor years before the succession process began. Patrick shared that Skyline was fortunate to be able to bring Ben on staff well before his transition with Peter, but that the church had a track record of familiarizing the staff and congregation with potential candidates to get additional feedback. Patrick said, “Creating familiarity, providing training, and testing candidates over time, helped the leadership’s confidence level enormously.” Peter agreed, stating “Hiring a potential successor years before handing the keys over to him is essential.”

Peter emphasized that a congregation needed time to build up trust for the successor if he wanted to have a chance of leading them.

Edwin mentioned that Parrish had hired Murray's successor about twelve years before he came into the senior pastor role. Edwin admitted, "We didn't intentionally hire him at that point in time to specifically be Murray's successor, but it worked out great." Murray explained that Parrish had a culture of promoting from within, so when the time came to tag a new senior pastor, the church would already know him.

Tim said that Grace Reformed had hired Kevin about five years before he was selected as the next senior pastor. Tim admits that Kevin's hire wasn't intentional but said, "Knowing we had a culture of hiring younger men and training them for a handful of years prepared Kevin and the church for his ascendance."

Summary of Strategies That Reduce Organizational Anxiety

The final research question asked, "What are strategies that reduce the organizational anxiety that congregations experience in successions? The following themes emerged from the participants' answers: succession principles, timing, and staff dynamics.

Succession principles that reduced organizational anxiety included transparency, empathy, trust, and self-differentiation. Succession timing included planning for years, not months. Staff dynamics that reduced anxiety included public support for successors, internal candidates, and wisdom to hire potential successors years before transitioning.

Summary of Findings

This chapter examined how senior pastors seek to create organizational continuity through their succession plan. Participants described creating organizational continuity, addressing challenges, incorporating essential elements, and creating strategies to reduce congregational anxiety as significant factors in creating organizational continuity through their succession plan.

The participants also provided information on how senior pastors could create organizational continuity before their transition. The following themes emerged from their answers: the role of the outgoing senior pastor, process alignment, and organizational flexibility.

The following themes emerged as participants discussed common challenges they experienced during their succession planning process: an organizational sense of loss, additional challenges with polity, hiring, staff, job descriptions, and unique contextual challenges.

Participants discussed multiple themes related to essential elements in the succession planning process, which included leadership development, key people, key plans, and best-fit considerations. Lastly, participants discussed the following themes that reduced their congregational anxiety. Those themes included succession principles, timing, and staff dynamics.

Chapter 5

Discussion and Recommendations

The purpose of this study was to discover how senior pastors create organizational continuity through their succession plan. The assumption of this study was that senior pastors who have developed a succession plan and implemented that plan in their transition, would have experiential knowledge, wisdom, resources, and suggestions for best practices building organizational continuity and reducing congregational anxiety throughout the transition process. To examine these areas more closely, the following research questions guided the qualitative research:

1. How do senior pastors seek to create organizational continuity before their transition?
2. What are challenges of succession planning?
3. What are essential elements of the succession planning process?
4. What are strategies that could reduce the organizational anxiety that congregations experience in successions?

This chapter will bring together the literature reviewed in chapter 2 and the interview findings in chapter 4 in summary fashion. These findings will be discussed and recommendations for practice and further research will be suggested.

Summary of the Study and Findings

This study reviewed relevant literature in three areas and analyzed interview data from seven Reformed leaders. The literature review has shown that succession plans are biblical, practical, and organizationally anxiety reducing, when thoughtfully planned and executed over the span of a few years. The succession planning process is complex, but if a church has a differentiated senior pastor who is willing to do long-range planning, it is possible to create organizational continuity in transition.

The first section of literature revealed God as the originator of the succession planning process. God, through the creation of child birth, created the reality of successive generations. After Adam and Eve's descendants' days were shortened to 120, Israel's leaders had shortened tenures, necessitating the transfer of power from leader to another to continue God's creation mandate.³⁰² Two biblical case studies presented data rich content to examine for the purpose of discovering best succession practices. The successions of Moses to Joshua and Paul to Timothy were particularly helpful. Principles of proactive leadership, long-term mentoring, internal successor selection, and public proclamation of adoration and support for one's successor were gleaned as best practices.

The second section of literature on church and corporate successions found seven common elements essential for the planning and execution of a smooth transfer of knowledge and power. The seven common elements were identifying key people, developing a succession timeline, creating a successor profile, creating an emergency succession plan, developing a communication plan, hiring internal candidates as

³⁰² Genesis 1:28, 2:15.

successors, and hosting a celebratory event to honor the past and look forward to the future.

The third and final section of literature examined organizational systems literature and four key findings. The first revealed church congregations as emotional systems. The second revealed that senior leader transitions often cause significant organizational anxiety, filtering down from top to bottom. Third, William and Susan Bridges masterfully explained the three phases of change management during major transitions.³⁰³ Fourth, Edwin Friedman illuminated Murray Bowen's research showing that differentiated leaders have the capacity to reduce organizational and congregational anxiety by their presence, words, and actions.³⁰⁴

After conducting the literature review, the question remained: How do senior pastors seek to create organizational continuity through their succession plan? The interviews revealed four significant categories to consider. The first revealed the importance of organizational alignment. The participants discussed the vital role that their mission, vision, and values played in shaping the expression and goal of their succession process. Their succession plans were extensions of their mission, vision, and values. The key individual who maintained organizational alignment was the senior pastor. It was discovered that he had the capacity to align, bend, or break the process entirely.

The second finding explained the challenges in the succession process. Common challenges were congregational anxiety and pervasive feelings of loss. Additional

³⁰³ Bridges and Bridges, *Managing Transitions*, 4-5.

³⁰⁴ Friedman, *A Failure of Nerve*, 14.

challenges impacted the staff and search committee. Lastly, unique contextual challenges were discovered throughout the process.

The third finding revealed four essential patterns in successful successions. The first pattern that the participants revealed was their church's value for creating a leadership development culture. The second identified the key people in the succession planning process: the senior pastor, elders, and a professional consultant. The third finding described the essential nature of key plans, such as a succession timeline, emergency succession plan, communication plan, and celebratory event to cap an end and jump start a new beginning.

The fourth finding presented strategies that reduce organizational anxiety through the succession planning process. The participants expressed that succession principles of transparency, empathy, trust, and self-differentiated leadership were disproportionately important to the succession planning process. They also mentioned the timing of the succession as a significant factor in either causing or alleviating anxiety, based on the length of the planning period. Lastly, the participants noted that carefully navigating staff dynamics with succession principles made a significant difference.

Discussion of Findings

The literature and interview research, along with my personal perspective, revealed twenty significant findings. These findings support existing thinking and expand criteria that can enhance organizational continuity during succession. Recommendations for future succession planning and research follow.

Congregations Are Emotional Systems

The literature review described organizations as emotional systems. Ronald Richardson stated that church congregations are like family systems, with logical and emotional makeup.³⁰⁵ Whenever there is a crisis, significant change, loss, or disruption, anxiety ensues throughout the system. Bowen Family System expert, Roberta Gilbert, agrees, stating that church congregations show the same emotional characteristics as families. When there is enough anxiety, conflict, distance, or cutoff, there will likely be over-functioning, under-functioning, and triangulating in the family system.³⁰⁶

The seven research participants did not refer to their congregations as emotional systems, but they described congregational feelings of loss, disappointment, frustration, anger, and sadness during their succession planning process. Patrick described congregants at Skyline Church as collectively sad, knowing that Peter would no longer be their senior pastor. Edwin noted that the elderly at Parrish Church were visibly distraught at town hall meetings anticipating Murray's transition. Tim mentioned that several congregants at Grace Reformed expressed feelings of shock and grief, realizing Tim would no longer be preaching on Sundays after listening to him for four decades.

The literature review and research participants confirmed my personal experience that churches are emotional systems prone to emotional reactions and dysregulation when systemic trauma is experienced. The literature provided additional data that expanded my understanding of organizational anxiety. Richardson explained that organizational anxiety at its basic level is the threat of a lost identity. Observing many pastoral

³⁰⁵ Richardson, *Creating a Healthier Church*, 41.

³⁰⁶ Gilbert, *Extraordinary Leadership*, 19.

transitions myself, I can confirm that statement. Jim summarized by saying, “What congregants fear in transition is not change, but the loss of their DNA.”

Allowing congregants a chance to publicly and privately grieve their collective loss is paramount for a healthy succession. Understanding that they are an emotional system experiencing anxiety is critical. As children grieve the loss of a parent, congregants too need a chance to grieve the loss of a spiritual father. Churches would be wise to affirm their congregation’s sense of loss, and provide space to grieve their loss. Too often churches bypass this and as a result, short-circuit the grieving process that is essential for organizational healing and renewal.

Organizational Anxiety

Several participants mentioned that their succession planning process was incredibly disruptive to the life of the church. Many stated that their succession process brought on a fear of identity loss. Without their tenured leader at the helm, they shared that congregants feared their church wouldn’t be the same after the transition.³⁰⁷

Max mentioned that at Redemption Church, their entire church model was disrupted. He said, “Our decentralizing process, moving from a centralized church model to a decentralized church model caused system-wide anxiety at specific points in time.” He mentioned that they knew nobody could fill the shoes of Jack at Redemption because he was a once-in-a-generation communicator, and therefore they went the hard route and

³⁰⁷ Richardson, *Creating a Healthier Church*, 48.

decentralized into three churches to fulfill their mission to the city and spread the weight of Jack's shadow.

In the literature review, Herrington, Taylor, and Creech added, "Congregations often experience a deep sense of instability, loss, grief, and threat when they lose a long-term pastor."³⁰⁸ Shitama concurred, noting that significant shifts in the life of a church compound anxiety already there because of the rapid changes in society.³⁰⁹

Vanderbloemen explained that pastoral transitions force congregants and staff to come to terms with the possibility of substantial changes and that the sheer plausibility of more change often causes wide-spread feelings of anxiety.³¹⁰ The fear of the unknown can be crippling to leaders, staff, and congregants alike.

Self-Differentiated Leadership

Leadership transitions often cause systemic anxiety, but as the literature and participants revealed, systemic anxiety can be reduced by differentiated and non-anxious leaders. Creech stated that well-differentiated leaders offer a steady hand and calm presence that naturally reduces systemic anxiety.³¹¹ Gilbert agrees, stating that such leaders naturally replicate themselves in others, spreading differentiation throughout the system, little by little.³¹²

³⁰⁸ Herrington, Taylor, and Creech, *The Leader's Journey*, 97.

³⁰⁹ Shitama, *Anxious Church Anxious People*, 2-3.

³¹⁰ Vanderbloemen and Bird, *Next*, 173.

³¹¹ Creech, *Family Systems and Congregational Life*, 33.

³¹² Gilbert, *Extraordinary Leadership*, 108.

Several participants confirmed the literature, mentioning the capacity of their transitioning senior pastor to calm the masses with transparent and empathetic words. Max mentioned Jack's ability to empathetically speak words of truth and kindness to congregants, putting them instantly at ease. Edwin said that Murray was so loved by the congregants at Parrish that when he spoke it was as if the congregants absorbed his love and affection, attuning to the needs of their souls. And Patrick noted that when Peter spoke, the masses listened intently, trusting that Peter's thoughts were logical, calculated, and intended for their good.

After interviewing the seven research participants, I was convinced that what Patrick, Jim, Max, and Edwin said about Peter, Jack, and Murray was true. Speaking with Murray and Peter, I could sense they were self-aware and well-differentiated leaders. They spoke with confidence, calm, gentleness, and self-regulation, and I was sure the testimony about them was accurate.

In the literature, Richardson notes that these leadership traits are critical because they can replicate themselves.³¹³ He explains that scaling emotional skills in an organization is possible only if the most trusted leaders exemplify them. Herrington, Taylor, and Creech agree, stating that systemic differentiation starts when leaders pursue their own differentiation.³¹⁴

³¹³ Richardson, *Creating a Healthier Church*, 47-50.

³¹⁴ Herrington, Taylor, and Creech, *The Leader's Journey*, 106.

Denominational Polity

All the research participants mentioned that their denominational polity hindered their succession planning process by requiring a search committee of lay leaders and congregants but failing to include the transitioning senior pastor or any depth of understanding of his role. Tim, Peter, and Jim noted that it is an impossible task to ask congregants to select a new senior pastor when none of them have ever been a senior pastor or privy to the inner workings of the church. They believed that the BCO prescribed process was deeply flawed. Max, Edwin, Jim, and Peter created ways to work around the flaw, ensuring that the senior pastor's voice and other senior leaders' voices were prioritized in the selection process.

I was not surprised by this finding because the literature and participants confirmed that the outgoing senior pastor was the most significant figure in the succession planning process. It made complete sense that a differentiated senior pastor would understand the current and future needs better than a group of congregants.

Alignment

The research participants also exposed a gap in the succession literature: the value of aligning the succession planning process with the overarching organizational mission, vision, and values. Patrick mentioned that Peter was concerned with organizational alignment and the need to align their succession plan with the church's mission, vision, values, and long-term goals. Jim also mentioned that their succession plan ought to be an aligned expression of their church identity. Peter agreed, adding that it was paramount that his successor value the non-negotiables of the church, embodying the DNA of the

church. Peter said, “When I asked Ben what he would want to do differently, he said, ‘I like what we are doing here,’” and Peter replied, “I think that will work.”

Max reiterated the value of aligning their succession process with Jack’s theological vision for Redemption, stating, “From the very beginning Redemption has always been committed to planting more churches in the city, to reach the city, so decentralizing our church in the succession process to plant three new churches just fit.” Max also mentioned how hard that was, tripling everything they did, but said that it was worth it, knowing they were remaining true to the DNA of the church.

The Senior Pastor as Most Important

Noel Tichy, a world-renowned succession expert, said that the development and selection of an organization’s next leader is the single most important decision any organization can make.³¹⁵ Multiple literature sources noted that the outgoing leader was the most significant individual in the succession planning process. Weese and Crabtree observed that the person with the ability to bless or curse the transition process was the transitioning senior pastor.³¹⁶ Vanderbloemen agreed, stating that senior pastors have the relationship capital, institutional knowledge, and power to stabilize or de-stabilize the entire transition process.³¹⁷

Several participants confirmed the literature, mentioning that their senior pastor drove their succession planning process and that it went well because he did. Peter and

³¹⁵ Tichy, *Succession*, 53.

³¹⁶ Weese and Crabtree, *The Elephant in the Boardroom*, 48.

³¹⁷ Vanderbloemen and Bird, *Next*, 57.

Tim admitted that they were the key drivers in their succession planning process, and they stated the benefits of their approach. Tim mentioned that he was able to calm the congregation, letting them know it was his idea and that he was not being pushed out, reducing his congregation's sense of anxiety. Peter mentioned that he understood the senior pastor role, responsibilities, and culture and therefore was uniquely equipped to drive the process forward. Peter also mentioned that he wanted to see the transition go well, noting the failures of friends who took their hands off the wheel. Jim confirmed Tim and Peter's assertion, stating that in his travel to twenty different churches, it was clear that successions went well only when the outgoing senior pastor owned the process.

Barriers Removed

The literature did not significantly note the value of outgoing leaders who removed barriers for their successors, but several participants mentioned the benefits of addressing issues that would carry forward. Jim and Peter noted that they wanted to bless the next senior pastor by paying off the church mortgage so that the next pastor did not have to carry that burden. Jim also noted that they created a separate sinking fund prior to the transition to help pay for building repairs and upgrades likely to plague the next senior pastor's tenure. Tim mentioned that he fired an associate pastor to clear the staff deck, create more budget space, and not hand the next senior pastor a staff member who was not carrying his weight. And Jim mentioned that Skyline Church had multiple fee-based ministries they subsidized but strategically reduced down to zero over ten years to free-up budget space for the new senior pastor's vision initiatives.

The process of removing barriers that could hurt or sabotage the next senior pastor's tenure was a learning gap the participants filled. Looking ahead and removing likely landmines significantly aided the transition process and eased the successor's mind. Patrick and Jim mentioned that Ben, Peter's successor, raved about the thoughtfulness they took to set him up for success. Ben continues to flourish as the senior pastor at Skyline because Peter and other senior leader set him up in the best possible light before his transition.

The Transitioning Senior Pastor's Presence

Contrary to popular belief, transitioning senior pastors do not have to leave their church-staff to have a healthy transition. Well-differentiated senior pastors can have a stabilizing impact by remaining on staff in a reduced role. The senior pastors who remained on staff, along with their staffs, confirmed how helpful it was during a turbulent time in the life of their church. Four strategies made their retention possible: the existence of a teaching team, the intentional reduction of their public presence, a clear job description and scope of authority, and consistent support for their successor, publicly and privately.

If the transitioning senior pastor is not well-differentiated and these four conditions are not met, I would not recommend the transitioning senior pastor remaining on staff. It was clear from the participants' comments that the transitioning senior pastor had to be an emotionally intelligent individual to remain on staff in a reduced and supportive role. Murray noted that he had the power to enhance or derail the succession process based on his words, actions, and disposition. He mentioned that he practiced this

line over and over so that he would not be a subversive voice: “I love my boss.” Peter added that he took a six-month sabbatical to give Ben time to settle in before he came back on staff in his reduced role. Peter mentioned that he had received permission from Ben and the senior leadership team so this arrangement was doable. Murray and Peter noted that diminishing their public voice and presence prior to their transition made it easier to remain in the background post transition.

Organizational Clarity

One significant challenge noted was a lack of clarity around staff roles and responsibilities before and after the transition. Patrick noted that he felt like he was floating for a while during the succession planning process because he didn’t have a clear job description. He wasn’t sure if his scope of authority was going to grow or shrink because of the transition. Max mentioned a similar sentiment saying that many staff members asked him for clarity about their future responsibilities post-transition. Peter added that Skyline had a robust organizational chart, filled with droplines and additional notes about shifting roles, but even that wasn’t enough clarity for some staff.

Whether staff anxiety stemmed from a fear of being let go or a lack of job description clarity, I couldn’t clearly determine, but what was clear was staff wanted clarity regarding their role and responsibilities pre- and post-transition, especially if there was going to be a change or shift in their role.

Timelines

All the churches examined had senior pastors with lengthy tenures, and the literature and research participants all mentioned the benefits of a longer off-ramp for the transitioning senior pastor. The longest planning period was twenty-two years, and the shortest planning period was three years.

The literature and participants confirmed that the more time the congregation had to prepare for the senior pastor's departure, the better the succession went. Ronald Heifetz and Marty Linsky note that healthy leadership means disappointing people at a rate they can accept. People, they conclude, do not resist change but rather the loss that comes with the change.³¹⁸ If the feeling of congregational loss can be spread out over a longer period, it gives more time to process grief. Change management experts William and Susan Bridges call this "ending, losing, and letting go."³¹⁹ They say that this phase requires time and empathy from the organization's leadership to progress to the next two phases of transition. Short circuiting the grieving process only delays the inevitable.

Recommendations for Practice

In light of the findings described above, the church is well advised to discuss and plan their succession process years in advance. It is paramount that the transitioning senior pastor own and speak into the succession planning process. Senior pastors with long tenures require longer planning and transition periods to develop viable candidates and reduce congregational anxiety. Organizational stability and continuity are critical for

³¹⁸ Heifetz and Linsky, *Adaptive Leadership*, 43.

³¹⁹ Bridges and Bridges, *Managing Transitions*, 3-5.

the missional success of the church in transition. The recommendations below emerged from the findings in the literature and research participant interviews.

Culture Fits

Succession literature and the research participants agreed that best-fit candidates are culture fits. CEO succession experts Saporito and Winum said, “The best succession candidates are often candidates who have the same character and values as the organization.”³²⁰ Bronner and Chand agree, explaining that cultural compatibility can be the difference between succession success and failure because a viable candidate must reflect an alignment with the core organizational beliefs, values, and strategies.³²¹

In my interview with Peter, he mentioned that it was paramount for Skyline to hire a candidate with the central values of the church. He explained that a best-fit candidate was a candidate whose non-negotiables matched the church’s non-negotiables. Edwin, Max, and Tim affirmed Peter’s conviction, adding that the best way to get a candidate to become a better culture fit was to hire them years before their possible ascension. They suggested soaking the new pastor into the culture so that they could watch and see if he embodied their mission, vision, and values or just gave them lip service during the hiring process. True culture fits are either home-grown or integrated into the culture over time, providing time and space to embody the DNA of the church.

³²⁰ Bronner and Chand, *Planning Your Succession*, 65.

³²¹ Bronner and Chand, *Planning Your Succession*, 54.

Internal Candidates

The literature and research participants confirmed my assumption that the best succession candidates come from within a church or an organization through a leadership development program. If a church or an organization has a leadership development program and engages their staff in it, Timms says, there is a high likelihood that that organization will develop a viable successor.³²² Vanderbloemen agrees, stating that churches that do not intentionally develop their bench will suffer long-term results.³²³

Harvard Business Administration Dean Das Narayandas explains that internal leadership development programs develop high quality candidates because of the neuroscience of learning. The distance between where a skill is learned (locus of acquisition) and where it is applied (locus of application) significantly influences the probability of that skill being put into effective use.³²⁴ Jim, Peter, and Max agreed, stating that their capacity to develop, test, and watch their candidates inside their own church system was crucial to their selection process. Several mentioned watching the successor grow over the span of a few years as a reason for confidence in their selection.

Saporito and Winum conclude, “The most successful successions occur because internal candidates were groomed, tested, and selected over a long period of time.”³²⁵

³²² Timms, *Succession Planning That Works*, 180.

³²³ Vanderbloemen, “12 Things Failed Succession Have in Common.”

³²⁴ Narayandas, “The Future of Leadership Development.”

³²⁵ Saporito and Winum, *Inside CEO Succession*, 78.

Young Generalists

The literature did not conclude a specific age range for best-fit candidates, but the churches examined hired successors between the ages of 35 and 45. The prevailing idea was to hire young in hopes that their tenure would last two to three decades, as had their predecessors. Jim provided an additional explanation for hiring young saying, “We hired a younger pastor to also drive down the average age of our congregation because we found in our research that there was a direct correlation between the age of the senior pastor and the average age of a church congregant.” Peter agreed, stating that they aimed at attracting 35-year-old congregants to stay fit as a church for the long-haul. Jim and Peter explained that younger congregants were needed to back-fill the older generation exiting core leadership positions at the church.

The other interesting pattern that emerged was that the successors who were hired were young generalists. I define a young generalist as a young adult minister, youth minister, or college campus minister. These pastoral roles often require a general set of skills that include preaching, teaching, leading, counseling, and systems management for a specific demographic. These pastoral roles are excellent incubators for the kinds of gifts and abilities needed for the senior pastor position. Scaling the gifts and capacities of these types of pastors led these churches toward succession success.

Hire Before Transition

One succession strategy that significantly reduces congregational anxiety is hiring a successor years before the transition. The participants mentioned that they had hired their potential successor on staff between three years and twelve years in advance of their

transition to being senior pastor. Peter mentioned that it was crucial for Skyline to have a period of time to build up trust with Ben if he was to have a chance at leading them. Murray agreed, stating that Mark was so well loved by Parrish that when the session notified the church that Mark was the candidate, the congregation was ecstatic because they had had twelve years of watching, listening, and working alongside him. Patrick concluded, “Creating familiarity between a potential successor, staff, and congregation, boosts trust and confidence.”

A Succession Consultant

The literature and participants said succession consults were critical to the succession planning process. Weese and Crabtree mentioned that the succession planning process is greatly aided by adding an unbiased voice to the process. They explained that churches are highly emotional systems that should not leave the transition process up to well-intentioned congregants or search committee volunteers.³²⁶

Saporito and Winum agree that professional succession consultants are worth their weight in gold because they offer out-of-the-box thinking, questions, suggestions, and industry best practices that can enhance an often-complex process.³²⁷ Jim affirmed the literature, stating that the only regret he had was not hiring a consultant sooner. Edwin, Peter, and Max agreed, mentioning how helpful it was to have an outside voice affirm, deny, inform, and challenge assertions that their internal planning teams had

³²⁶ Weese and Crabtree, *The Elephant in the Boardroom*, 152.

³²⁷ Saporito and Winum, *Inside CEO Succession*, 47.

throughout the succession planning process. They said their consultants offered best practices, new ideas, and unique solutions that greatly aided their planning.

A Timeline

The literature and research participants noted the importance of creating a succession timeline early in the planning process. Vanderbloemen mentioned that writing down action items, milestones, and key dates provided clarity and alignment to the succession process. He explained that failing to create a timeline often led to confusion, ambiguity, and lost organizational momentum.³²⁸ Weese and Crabtree agree, adding that a church's size should also impact the succession timeline. They recommended that larger organizations ought to have longer planning durations, due to the size and complexity of the organization.³²⁹ Saporito and Winum suggested a length of three to ten years of planning for larger organizations.³³⁰

The research participants all agreed with the literature stating that their succession timelines lasted between three to twenty-two years in length. Peter said that their twenty-two-year planning period provided them a long off-ramp to get the choice right. He mentioned that in that timeframe they adjusted their organizational chart, potential candidate list, and candidate profile many times, making multiple iterations for their timeline. Jim noted that their advanced planning produced clearer communication and a

³²⁸ Vanderbloemen, "12 Things Failed Succession Have in Common."

³²⁹ Weese and Crabtree, *The Elephant in the Boardroom*, 142.

³³⁰ Saporito and Winum, *Inside CEO Succession*, 93.

deeper sense of calm in their large congregation because everyone knew that they had a plan in place for the day that Peter would no longer be their senior pastor.

A Teaching Team

The participants also noted the benefits of creating a teaching team prior to their church's succession. The literature did not mention the creation of a teaching team as a significant factor for successful succession but several churches mentioned that their teaching team was a significant factor in their success. Jim said, "It was one of the best moves that we made pre-transition." Patrick explained that the teaching team dynamic not only provided a diversity of voices for Skyline's congregation but also diminished the voice of the outgoing senior pastor over a long period of time. Peter agreed, adding that the teaching team was a central element of their succession plan because it created stability for the whole church rather than relying on his sole voice, which would be transitioning out soon.

Edwin and Murray noted that the secret to their succession success was their team leadership dynamic. They explained that their pastoral staff owned the preaching, teaching, and vision of the church. Mark, Murray's successor, was a member of the teaching team, and one benefit Edwin highlighted about the teaching team was that Parrish had the chance to hear Mark preach over a handful of years, getting used to his voice. Murray mentioned that if they hadn't had a teaching team, it would have been a harder transition because it would have been an abrupt voice change.

An Emergency Succession Plan

The literature suggested that an emergency succession plan was an essential document for organizational accountability. Greer and Fagerstrom explained that an emergency succession plan reduces situational anxiety if something unexpected or terrible were to happen to a senior leader. They added that an effective emergency succession plan should communicate the next leader up, that leader's interim role, scope of power, and sequential steps to find a permanent replacement.³³¹

Jim agreed, stating that in his research traveling to twenty churches around the country, all noted the importance of an emergency plan, but only one had created one. He said that particular experience motivated him and other senior leaders to immediately create a Mac Truck plan for Peter and Skyline. Jim added that their plan designated clear lines of authority, changes in the organizational chart, and shifts in staff roles and responsibilities that they would need to adjust to temporarily.

Not all the churches I examined had an emergency succession plan, but they stated that they needed to create one. The alarming truth that the literature and participants highlighted was organizational recognition of the importance of an emergency succession plan but no follow-through.

³³¹ Greer and Fagerstrom, *Succession*, 125.

A Communication Plan

Transparency builds trust within all organizations. Bronner and Chand agree, stating that stakeholder engagement is absolutely crucial in any successful succession.³³² Saporito and Winum note that communication plans align the entire organization during the succession process, delivering the right information to the right people at the right time.³³³ Elizabeth Johnson, a change management expert, explains that proximity of impact must also be considered with communication plans. She adds that those closest to the change need to be notified first with the most details, and those least impacted ought to be notified last with more general details.³³⁴

All the research participants noted the value of their communication plans during their succession planning process. The literature confirmed the vital nature that communication plans often play. Jim stated that their stakeholder analysis helped identify the various stakeholder groups they needed to communicate with and with what degree of specificity. Peter added that their communication plan targeted specific groups of people at specific times, with specific levels of information, due to their proximity of impact by the succession. Patrick also mentioned that Skyline's communication plan was a stair-stepped plan that took place over a few years.

Several participants mentioned categorizing staff and congregants separately, noting the importance of notifying staff prior to the public. Patrick mentioned that as a staff member, he wished that he had had more details sooner about Skyline's succession

³³² Bronner and Chand, *Planning Your Succession*, 48.

³³³ Saporito and Winum, *Inside CEO Succession*, 167, 176.

³³⁴ Johnson, "How to Communicate Clearly During Organizational Change."

plan but noted that he and other staff were notified months in advance of the general congregation. All the participants mentioned that they notified staff of the internal changes months in advance of notifying the congregation.

A Celebration Plan

The literature and research participants mentioned the importance of celebrating the tenure of the transitioning leader. Kouzes and Posner write that public celebrations of accomplishments build commitment through an entire organization because they cannot only celebrate an individual but also signal to the rest of an organization that their contributions will also be affirmed and validated.³³⁵ Vanderbloemen agrees, saying that healthy successions always plan to end on a high note. He adds that there should be public and private celebrations for particularly long tenures, noting the importance of public acknowledgement and intimate words of gratitude for years of faithful impact.³³⁶ Bridges and Bridges also note that celebrations mark not only an end. They say that celebratory events can also usher in the final transition phase, the new beginning.³³⁷

Several senior pastors noted how much they appreciated their celebratory event, saying how seen and affirmed they felt. They all mentioned that their event included personal stories, funny anecdotes, cataloged photos through the years, accomplishments and milestones. Jim mentioned as a bystander that Peter's event celebrated the past and harnessed positive movement for Ben's future. He elaborated, saying it truly was a

³³⁵ Kouzes and Posner, *The Leadership Challenge*, 276.

³³⁶ Vanderbloemen and Bird, *Next*, 174.

³³⁷ Bridges and Bridges, *Managing Transitions*, 3-5.

unique opportunity to glorify God by marking one end and another beginning. Tim agreed, mentioning the service that Grace Reformed hosted for him was deeply satisfying and appropriate, marking the end of one tenure and a beautiful beginning to another.

Recommendations for Further Research

This study focused on the essential elements of the succession planning process that create organizational continuity. As with any study, there are limitations as to how extensive the research can be. Therefore, pursuit of the following areas of study could be highly valuable for further exploration.

Small to Medium-Sized Churches

Most of the corporate and congregational succession literature presupposed a larger organizational context, leaving small to medium-sized churches unrepresented. The four churches examined in my research would be considered larger resource churches with 600 to 5,000 congregants. Further research is needed to understand the capabilities and challenges of small to medium-sized churches embarking on succession planning since they usually have fewer resources than larger churches.

Polity

All the research participants mentioned how denominational polity impeded their succession planning process, especially their hiring process. The necessity of a search committee or pulpit supply committee, comprised of congregants and church leaders, tasked with hiring the next senior pastor, was found to be problematic. The literature and

participants agreed that the transitioning leader is the most significant person in the succession planning process, but the participants explained that their denominational polity does not account for that. More research is needed on the integration of the transitioning senior pastor's voice in the succession planning process.

The Successor's Perspective

There is insufficient literature describing a successor's perspective of the succession process. There is robust organizational literature describing the role and perspective of the transitioning CEO, board, CHRO, and other C-suite leaders within an organization but not much written on the role and perspective of the incoming successor. I have not discovered any research describing the perspective or experience of incoming senior pastors who have been internally developed as successors. This is an area of research that ought to be explored.

Differentiated Leadership

The literature and research participants described church leaders who are differentiated and non-anxious as anxiety-reducing forces for congregations in transition but more research on the process of becoming a differentiated leader would benefit church leaders and congregants. A more detailed approach on the process of becoming a differentiated pastor could stabilize more churches anticipating future transitions. Studying the lives, experiences, and practices of well-differentiated pastors could be a place to start, as well as researching the link between Bowen's theory of differentiation and smooth pastoral transitions.

Pastoral Teaming

There is a significant amount of leadership and business literature on the power of teams, team leadership, and the dynamics that make teaming vital to an organization's mission and vision, but in ministry, there is a significant gap of literature exploring the practices and benefits of pastoral team leadership. Many participants described their church's approach to team leadership as an essential aspect of their successful succession process. Murray said, "Without our team leadership model, I don't know how we would have managed to remain as stable as we did during our transition." Jim and Peter alluded to the same fact, mentioning that their teams of pastors and senior leaders were essential to the continuity and stability of Skyline's transition and ministry model. Peter said, "If a pastor has about forty years or so of ordained ministry in him, then it's a fact of life that a healthy and productive church will likely experience multiple successors, necessitating many capable leaders over its lifetime." He asked, "How do you develop capable leaders from generation to generation?" He answered, "Team leadership."

Final Summary

The purpose of this study was to discover how senior pastors create organizational continuity through their succession plans. Chapter One explained the reality that churches face significant challenges when senior pastors retire or transition without succession plans. In Chapter Two, the literature review identified key succession elements, principles, and leadership traits that reduce congregational anxiety in senior pastor transitions. Chapter Three explained the research method and participant selection for this

research. Interviews were conducted with the research participants from four churches using the following four research questions:

1. How do senior pastors seek to create organizational continuity before their transition?
2. What are perceived challenges of succession planning?
3. What are essential elements of the succession planning process?
4. What are strategies that could reduce the organizational anxiety that congregation's experience in successions?

The research participants, in Chapter Four discussed the key people and processes that lead to their successful succession and organizational continuity. Participants discussed the need for organizational alignment, the role of senior pastor as the central voice in the succession planning process, as well as transitional challenges, essential succession elements, and strategies to reduce congregational anxiety as significant factors to their success. Chapter Five concluded with ten succession principles to follow and ten recommendations to apply in order to find, develop, and integrate a successor into a healthy succession plan.

Succession planning is not quick or easy but it is essential for organizational continuity and health. Healthy senior pastor transitions are rare but they do not have to be. The principles and recommendations expressed in this dissertation provide a set of best-practices for senior pastors, elders, search committees, and consultants.

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