

**THE LEADERSHIP SUCCESSION PROCESS
IN MEGACHURCHES**

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To the
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**By
Meredith Edward Wheeler
Temple University**

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ABSTRACT

The purpose of this study is to examine the succession processes and experiences of senior pastors in megachurches. The term *succession* is used in the study to refer to the transition in which one leader leaves an organization and another one takes her/his place. The term *process* speaks of the sequence of individual and collective events, actions, and activities unfolding over time in context (Pettigrew, 1985). The term *senior pastor* is used to refer to the top leader in churches with multiple pastoral staff. The term *megachurch* is used here as a descriptive term to refer to Protestant churches with 2,000 or more attendees in their worship services each week (Thumma, 1996).

Few changes have greater impact on an organization than the change of the senior leader. Historically, succession processes in churches have been disruptive events often leading to temporary or, in many cases, permanent decline (particularly when the predecessor led the church to a perhaps unprecedented time of growth). Succession was often an undiscussed matter until the departure of a predecessor. Since the proliferation of megachurches is a relatively new social phenomenon, little is known about the succession processes of senior pastors in these churches. This study on succession process seeks to address a gap in the literature regarding succession in megachurches by offering first-hand descriptive accounts by those who have lived through the succession process. Further, this study seeks to enrich the literature by seeking to integrate current leadership theory with this succession study.

Examination of the processes of succession and the nature of the proposed research questions favor a qualitative approach methodologically. Since this is an attempt to holistically describe what is going on and to build a knowledge base for

developing theory rather than test hypotheses, the methodology adopted needs to allow maximally for serendipitous discovery, description and explanation. This study proposes to describe, analyze and compare the succession processes and experiences of senior pastors in three megachurches through in-depth interviews with those most immersed in the succession process, through document review, archival review and through a basic organization profile survey.

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CHAPTER 1

TRANSITIONS AND MEGACHURCHES: AN INTRODUCTION

Introduction

The goals of this dissertation are two-fold: (1) to provide first-hand accounts of the experiences of those most immersed in succession processes in three megachurches through qualitative, in-depth interviews, and (2) to gain insights regarding succession through analysis and comparison of the interviews and the churches.

Rationale

Leadership Succession Is a Vital Process in Organizational Life

“From now on it (choosing my successor) is the most important decision I’ll make. It occupies a considerable amount of thought almost every day” (Slater, 1993). These words were spoken by Jack Welch, CEO of General Electric, nine years before his anticipated retirement. Welch understood that leadership succession is perhaps the most crucial change process in organizations.

Transition of the CEO has a more significant impact on a firm than other leadership transitions due to the influence and authority these leaders typically possess. The “pervasiveness of the CEO’s impact on the firm and the symbolism of CEO succession is considered different from turnover at lower levels” (Kesner & Sebor, 1994). A CEO succession process has the potential of impacting individuals at every level of the organization because the change of the senior leader tends to trigger other changes in an organization (Miller, 1993). This succession process tends to be messy, unpredictable and complex versus clean, linear and simple (Burnes, 2005; Davis, 1999;

Cabrera-Suarez, 2005; Dawson, 2005; Fondas, 1997; Gordon, 1991; Haddadj, 2003; Ruane, 1984).

Kesner and Sebor (1994) note that, “CEO succession may also represent a unique case because the nature of the CEO’s job is substantially different from other organizational positions. The job is idiosyncratic, non-routine, and unstructured . . . there is nothing typical about the typical CEO” (p. 329). This speaks to the deep complexity to the senior leader role.

If long tenure is introduced as an element of the succession process, the infrequency of change represents a lack of decision-maker knowledge as to how to approach a succession process. This is particularly so when it is considered that senior leaders are usually chosen by a board of directors who often are not as familiar with the internal culture and processes of the organization (Heidrick & Struggles Inc., 1987). Grosky (1960), one of the early pioneers in succession research, observed that succession is inevitable. Every organization that seeks to survive long term will eventually experience a change in leadership. Grosky further observed that succession always results in organizational instability.

Successful transition is primarily defined in the literature in economic terms although a limited number of studies speak of success in terms of organizational dynamics that unfold during succession processes. Organizational dynamics when examined (including generational changes, cultural changes, personnel changes and predecessor/successor struggles) have been particularly examined in the context of family firms. This study seeks to examine leadership succession as a process and to identify some additional dimensions of what constitutes successful or effective transition.

Existing Research on Succession Has In General Not Incorporated Theories of Leadership

Although there would be little dispute that succession is a primary responsibility of a leader, the literature on succession largely fails to incorporate theories of leadership into succession studies. For example, leadership has often been dimensionalized along the strategic/visionary continuum. Insight could be gained if the current state/needs of the organization (identified as antecedents) were examined as informing the profile of the next leader, this examination completed in the context of leadership theory. Some organizations in the early stages of the implementation of vision may not be as desirous of a new leader coming with a whole new vision for the organization. Organizations in decline or in crisis may be inclined to develop a more charismatic or transformational leader profile. Since this is a broad-based qualitative approach, this study examines how current dominant leadership theories may inform succession research.

For example, Day and Lord (1988) critiqued succession literature. They focused in particular on problems which understate succession impact on organizational performance. The article moved from critique of the literature to implications for the development of executive leadership theories. Giambatista et al. (2005) comment on the Day and Lord article, "Implicit in this progression is the idea that understanding and studying succession effectively is very close to understanding leadership, which may explain succession's broad appeal to scholars," (p. 966). This study examines succession as an important expression of organizational leadership.

Descriptive Research Is Needed To Capture the Complexity of the Leadership Succession Process

The predominant methodological design for succession research has been archival study. This is the case because of the general ease of access to archival information on succession events, coupled with the difficulty of access to executives involved in succession processes. Kesner and Sebra (1994) affirm the value of archival data but observe that increased study sample sizes have given some researchers greater confidence as to generalizability and this despite the presence of clearer results. Their conclusion is that perhaps other methodological approaches may be more effective in responding to some research questions. They argue for qualitative and longitudinal methods. “Researchers may even find it helpful to increase their use of case studies and survey research” (p. 366).

Descriptive research asks the question, “What is going on?” Good description is fundamental to research and adds significantly to our knowledge and “provokes the ‘why’ questions or explanatory research” (New York University web article, “What is Research Design?” 1996). Marshall and Rossman (1999) summarize the purpose of descriptive research as documentation and description of the phenomenon of interest. The general research questions are, “What are the salient actions, events, beliefs, attitudes, and social structures and processes occurring in the phenomenon?” (p. 33).

A descriptive study was particularly appropriate to this study because leadership succession fundamentally is about change and about how organizations go through the change process. Most studies on succession segment the succession process and treat succession as a linear, phased process. Succession, like many organizational processes, is messy, complex and dynamic. Modesty is required in describing complex social

processes or in reducing them to definitive steps or stages. The organizational world is vast in its detail, complexity and uniqueness. Giambatista et al. (2005) in a comprehensive review of succession literature, write that, “simplistic notions of succession need to be discarded” (p. 987). The authors suggest further that as successions tend to be very disruptive, boards and incumbent leaders need to understand succession and to conduct ongoing succession planning to minimize organizational instability.

Mintzberg, in his research on the process of strategy formation, contrasts an emergent strategy research with the more conventional strategy of research. He writes:

The research has been as purely descriptive as we have been able to make it. That hardly seems unusual in organization theory. But most of the work has been concentrated in the policy area, where prescription has been the norm for a long time . . . the orientation to as pure a form of description as possible has, I believe, enabled us to raise doubts about a good deal of accepted wisdom: to be able to say that managerial work observed has more to do with interruption, action orientation and verbal communication than with coordinating and controlling; to say that diagnosis and timing count more in strategic decision making than the choice of an alternative from a given set; to say that strategy formation is better understood as a discontinuous, adaptive process than a formally planned one (Mintzberg, 1979, p. 583).

This study seeks to step back and look, not at segmented or isolated parts of the succession process, but rather at the process holistically: “What happened in succession?” “What was going on?” “How did it happen?”

Conversations with leaders who have *lived* the succession process offer the potential of exploring gaps in understanding succession processes. Research on succession processes has focused from a distance on the phases of succession (antecedents to succession or how successors were chosen) versus chronicling the experiential reflections of leaders. Succession literature could be enriched by “getting

closer” to the data through qualitative methods. This study conducted in-depth interviews with leaders who have lived through the succession process.

Megachurches Are Increasingly Important Social Organizations

“Megachurch” is a descriptive term for Protestant churches with 2,000 or more attendees in their worship services each week (Thumma, 1996). Although “super-sized” churches have existed at various points of history, no more than a dozen or so of these churches existed at any one time. Since the 1970s there has been an explosion in the number of these churches with more than 1200 such churches documented in the U.S. alone in 2005. Even though megachurches are a small minority of churches, by their size and visibility they tend to wield significant influence.

Although size is their most immediately apparent characteristic, megachurches are also differentiated from smaller ministries as well by the complexity and diversity of programs offered. Thumma writes, “The megachurch . . . is more than a church with a huge attendance. It is a congregation with a distinctive pattern of organization, programmatic ministries and membership relations. The rapid proliferation of this form of congregational life has taken place within the last several decades” (Thumma, 1996).

The megachurch is an important sociological phenomenon and yet few empirical studies exist on the topic. Research on megachurches is still in its embryonic stage with the majority of it taking place in the past decade. This study seeks to add a significant contribution on an understudied and yet crucial dimension of megachurch life, that of leadership succession processes.

Leadership in Large Church Contexts Has Not Been Adequately Studied, Particularly Leadership As Evidenced in Succession Processes

This study is vital because of the nature of leadership in the megachurch context. The size and complexity of the megachurch call for skilled leadership. Megachurches are typically led by directional leaders called senior pastors. Although senior pastors vary greatly in terms of gifts, leadership styles and personality, in general they are responsible for overall ministry direction. In churches, the senior pastor has disproportionate organizational impact because most every week, this leader speaks to thousands of members of that particular faith community. The senior pastor is the primary voice to the staff, board and faith community regarding vision, values, and direction. Relational, self-disclosing leaders tend to endear themselves to constituents such that there is a sense of relationship with this person that develops over time (Jourard, 1971).

According to “Megachurches Today 2005 Summary of Research Findings” released February 3, 2006:

- the average senior pastor is 52 years old;
- the median tenure is 13 years;
- 83% of the churches reported that the church’s most dramatic growth occurred during the tenure of the current senior pastor.

Several observations can be made from these data. First, although senior leader transitions occur for many reasons, the average age of the senior pastors, 52, suggests that megachurches will experience an enormous number of leadership transitions in the next one to two decades. A second observation is that although a senior leader’s influence cannot be considered as the sole reason that dramatic growth has occurred, with 83% of churches reporting dramatic growth during the tenure of the current senior pastor, it is not unreasonable to assume that the senior pastor in a megachurch has significant influence

in this growth. The visibility of a senior pastor as well as the influence that accompanies the frequency as the primary public communicator suggest that the departure and then succession of this leader will be a defining process in the life of a congregation. Yet there are few academic studies on pastoral transitions and none identified to this point on succession process in megachurches. Beyond this, there is sparse anecdotal information regarding the presence or absence of succession planning in megachurches. This is not to suggest that succession planning does not exist but simply that if it does, there is a scarcity of literature that directly speaks to it and makes it accessible to both scholars and practitioners.

Succession and leadership transitions are often avoided subjects in organizations, including megachurches for several reasons. These reasons include the discomfort of talking with a senior leader about his/her departure and the concerns of discouraging aspiring but potentially unqualified leaders. Russell Crabtree, a consultant and co-author of the book, *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions*, says that, “planning for a successor is the most urgent strategic issue facing most churches and yet almost no churches are facing up to this issue . . . pastoral change is the most certain strategic event that will take place in any church and it is the one that people talk about least” (Weese & Crabtree, 2004).

This dissertation on megachurch leadership succession seeks to make not only a unique theoretical contribution to succession research but also sought to provide practical help and talking points to the hundreds of megachurches that will be facing succession issues in the next decade or two.

Megachurch Senior Pastoral Succession Provides an Opportunity to Study Leadership Processes and to Enrich Understanding of Organizational Change

This study proposed to study a particular function of leadership in the megachurch, that of leadership transition. Leadership succession fundamentally is about change and about how organizations go through the change process. Although succession research has largely focused on the for-profit sector, succession events clearly impact non-profits as well.

Studies of leadership succession have primarily been situated in nondiversified U.S. manufacturing firms, family businesses, and sport organizations. There are a limited number of studies on succession in educational settings, but the topic of succession process in non-profits, particularly in churches, represents a gap in the literature. Giambatista et al. (2005) make an appeal for greater diversification in succession research settings. “Studies in distal settings offer the potential to triangulate, which in addition to testing the limits of theory, can serve as a springboard to new theories,” (p. 986). This study offered the setting of megachurches with a view to enriching theoretical explanations of leadership succession..

CHAPTER 2

LEADERSHIP REVIEW

In order to examine the leadership succession process, it is essential to review a range of literature. This study proposes to describe a process that involves the intersection of succession, leadership, church succession and megachurch streams of literature.

Leadership Succession

Four key dimensions of leadership will be considered in this section: succession importance, successor knowledge and influence as key to effective transition, leadership succession as transitional process and finally succession planning. These four dimensions are particularly relevant to the proposed study.

The Importance of Leadership Succession

Grusky (1960), long considered to be the “father” of succession research, argued that succession is important for two reasons: (1) succession always leads to organizational instability; and (2) succession is inevitable for all organizations. It leads to instability because succession introduces changes in relationships, changes in the way things are done and changes in the ways of seeing and thinking about organizational life. Romanelli and Tushman (1994) examined the impact of CEO succession on major organizational change within the context of technology firms. The authors defined revolutionary transformation as the transformation that occurs within an organization when leadership changes, structure changes and strategic changes converge within a two-

year period. They found that revolutionary transformation is much more likely to occur with a CEO succession.

Revolutionary transformations inevitably lead to conflict. Conflict is a natural part of change. But Grusky (1960) notes that the nature, intensity and duration of conflicts triggered by the changes succession processes bring about, can destabilize and in turn disrupt the functioning of organizations. He argues that his first reason (succession leading to organizational instability) should have every organizational leader's attention because of the second reason: the universality of the succession process. "All organizations must cope with succession. One reason for this is so obvious that it is easily overlooked—man is a mortal creature," (p. 106). Added risk appears to be present with the succession of an organizational founder. The organizational failure rate following a founder succession is extraordinarily high when compared to subsequent successions (Khaire, 2004).

Grusky also observed that the effectiveness of a successor is influenced by two factors: (1) the circumstances surrounding the departure of the predecessor, and (2) the organizational knowledge or influence that the successor possesses. Leaders exit organizations for a variety of reasons: resignation for a more advantageous position, age, illness, retirement, death, promotion, demotion or dismissal. The last three reasons are more under the control of the organization. The speed of the exit and the ability or inability of the organization to gain access to the accumulated knowledge of the predecessor impact the succession process. Absence of predecessor input introduces discontinuity into the organizational system and from a succession viewpoint tends to result in an accelerated rate of change and an increased scope of change. Grusky argues

that “the very existence of the predecessor on the scene tends to act as a stabilizing influence in its effects on the successors’ orientation toward change,” (p.107). That said, succession by its very nature is change and tends to trigger other organizational changes (Miller, 1993).

Successor Knowledge and Influence as Key to an Effective Transition

An extensive review of this dimension of succession follows because of the importance attributed to this dimension for effective succession.

Challenges in Succession

Leadership transitions are often challenging to both the organization and the new leader. It is no surprise then that an abundance of literature addresses challenges in the succession process. Frequent themes include dealing with imbedded ways of doing things and expectations following long-tenured leaders (Dobrey, 1999; Emerson, 1968; Greenblatt, 1983); differences in management style (Greiner (1972); generational conflicts (Grote, 2003); conflicts with existing leadership; and difficulties of serving under the predecessor and in turn under the successor (Dyer, 1986).

Brady, Fulmer and Helmich’s (1982) examination of succession planning process sheds light on succession challenges. An extensive survey of CEOs was conducted with 4000 surveys distributed and 1500 responses. The research originally was focused on whether or not the successor came from within the organization and if in turn successor origin gave any indication as to a leader’s anticipated tenure. Successor types were identified (long term employee, family member, professional manager) and the leaders asked as to how long they anticipated being in their position. Results were cross-tabulated

to show the strength of association between current promotional origin and the anticipated time in office for the presidents.

One of the significant aspects of the study was that the researchers provided an inventory of potential organizational problems. The researchers asked the CEOs to identify the types of problems they experienced as a successor and further asked them to rate the relative importance of the organizational problems. Results were cross-tabulated for successor origin. This methodology informed the development of interview guides and provided access to identification of conflict areas experienced during the succession process. The Brady, Fulmer and Helmich (1982) study identified the following kinds of problems:

- Interpersonal (predecessor not relinquishing control),
- Opposition from within the company,
- Winning acceptance for a new management style,
- Other issues like skill and knowledge issues (not having knowledge about the company, company relationships, company politics or industry knowledge).

Insider/Outsider Dichotomy

The types of problems raised in the Brady, Fulmer and Helmich study and the context within which they were raised naturally lead to the historic distinction of successor origin as an insider or an outsider. Corresponding to Grusky's observation on successor knowledge or influence, succession literature has traditionally categorized successors along the continuum of "insiders" or "outsiders," (Carlson, 1961; Grusky, 1964; Gordon & Rosen, 1984). The insider/outsider dichotomy has been one of the most researched dimensions of succession literature. Grusky acknowledges that there are degrees of "insiderness" and "outsiderness" and that although the amount of organizational knowledge or influence is related to whether or not the successor is

promoted from within the organization, successors are almost always strangers in an experiential sense to the new role. In other words, there is always a learning curve for the responsibilities and changed relationships of a new leadership role.

Birnbaum (1971), cited by Kesner and Sebor (1994), found that not all outsiders were alike. Successors who had been “socialized and trained in institutions which had similar characteristics to their recruiting organizations experienced less post-succession conflict and greater organizational stability,” (p. 335). Helmich and Brown (1972) suggested a shaping of the understanding of “insider” as the degree to which a successor was familiar with the social and political processes of the CEO position.

Insider or outsider origin has been linked to succession consequences. For example, Carlson (1961) in a study of school district superintendents concluded that insiders are compensated less, were more likely to maintain the status quo and were less influential than outsiders. Helmich and Brown (1972) and Helmich (1975) reported that insiders were associated with fewer organizational changes including structural and personnel changes. Brady and Helmich (1984) concluded that both inside and outside successors bring different kinds of solutions as well as problems to organizations.

Giambatista et al. (2005) in their extensive review of succession literature through 2004 conclude that the insider/outsider dichotomy represents one of too many simplistic dichotomies of concepts that are complex and multidimensional. Dichotomies, though convenient, are reductionistic in nature. The authors observe that the literature could be enriched by examining what it is about “insiderness” that presents particular advantages or disadvantages to a successor. This study proposes to interact with the idea of

insiderness and the social psychological construct of socialization (since this is the construct most often used in succession literature regarding this topic).

Succession and Socialization

One of the most dominant themes regarding challenges in the succession process has to do with socialization (Denis, 2000; Feldman, 1976; Fiegenger, 1994; Fondas & Wiersema, 1997; Frederickson, 1988; Normore, 2001; Soh, 2000). Schein (1968) suggests that socialization is the process by which individuals acquire organizationally specific values, ways of thinking and doing, forms of behavior, skills and organizational perspectives. Socialization theory suggests that every organization has many unspoken, assumed rules and ways of doing things. Significant conflicts emerge simply because newcomers do not understand or even perceive unique dynamics.

Fondas and Wiersema (1997) attempted to transcend the insider/outsider dyad by employing socialization theory to successors and strategic change. They theorized that differences in CEO's prior work experience, educational background, and personal characteristics coupled with the nature of the job and the characteristics of socialization agents (those who provide mentoring as to what is expected and believed in the organization) can all serve as influences that increase or decrease the likelihood of strategic change. Although others have written on socialization of newcomers into business settings (Allen & Meyer, 1990; Feldman, 1976; Reichers, 1987; Schein, 1968; and Soh, 2000), the Fondas and Wiersema article was the only literature reviewed that linked change and socialization theory.

Fondas and Wiersema (1997) write:

Why utilize socialization theory? It is a particularly promising theoretical approach because it is attentive to the processual underpinning of a

person's transition in to a chief executive job; that is, it reveals the reason why a manager's characteristics are expected and often shown to be associated with strategic inertia or strategic change following his or her succession into a chief executive job. Another reason is that, although previous researchers acknowledge that each executive has a myriad of background and experiential characteristics that may be relevant to an analysis of organizational change following succession (Hambrick and Mason, 1984), no theoretical or empirical statement of which are most important has appeared in the literature, (p. 563).

Fondas and Wiersema define socialization as, "the process by which an individual acquires the skills, knowledge, values, perspectives and expected behaviors needed to occupy an organizational position" (p. 566). They offer a perspective that goes beyond the distinction "insider" or "outsider" in terms of successor. They provide a description of an underlying process—socialization—that constitutes a theoretical rationale for the link between leadership successions and strategic outcomes. The distinction between insider and outsider, however, is not the only aspect of a person's background that influences the likelihood of strategic change. Other individual differences may be important. Situational contingencies may play a role. The authors argue that the differential outcomes of chief executive succession events may be better understood by examining the underlying process of socialization that affects any person newly appointed to a job and/or organization.

Fondas and Wiersema cite empirical studies exploring the relationship between the nature of executive succession and organizational outcomes:

The attention paid to the insider-outsider distinction highlights the importance of what researchers assume are cognitive differences between executives linked to their demographic characteristics such as organizational background . . . differences have led researchers to hypothesize that external candidates due to their unfamiliarity with the organization are likely to be greater agents of change . . . internal candidates have much greater familiarity with the routines and decision

making of the organization, their predecessors, the organizations' members and cultures (Fondas & Wiersema, 1997, pp. 564-565).

Socialization research has focused on the key points of conformity or nonconformity to the ways of thinking and doing. One of the believed benefits of outsiders is the creation of new ways of thinking and doing that help organizations adapt to new business environments. However, as Collins and Porras (1997) point out, organizations should not assume that hiring an insider is equivalent to non-change. For both insiders or outsiders, if there is ideological congruence with the organization, the possibility of implementation of new strategies and new ways of doing things as well as acceptance of leadership are more likely.

Succession, Home-grown Leadership and Organizational Stability

Brady and Helmich (1984) observe that “there is truly no substitute for an inside successor who rose to this position as a consequence of sound executive succession planning and careful grooming,” (p. 107). Collins and Porras (1997) argue for the benefits of internal leaders versus external leaders and name clear benefits of “knowing the culture,” including unbroken continuity of leadership and preservation of organizational ideology.

Kesner and Sehora (1994), in reviewing studies on succession process, observe that succession systems are considered optimal when they produce “a ‘seamless’ continuity in leadership,” (p. 360). They further observe that this desire to minimize organizational instability caused by leadership succession counters the need for responsiveness and rapid change in strategies and structures when responding to changes

in the business environment. When it comes to succession, business leaders believe that “stability was better” (p. 360).

Collins and Porras’ 1997 bestseller, *Built to Last*, identified successful habits of visionary companies. One of the habits was to preserve the core and stimulate progress. Collins and Porras argue that although core ideology is an essential component of a visionary component, core ideology alone cannot make a visionary company. “Core ideology in a visionary company works hand in hand with a relentless drive for progress that impels change and forward movement in all that is not part of the core ideology” (p. 82). The core ideology is a set of basic precepts that plants a fixed stake in the ground: this is who we are; this is what we stand for; this is what we are all about. The core ideology provides continuity and stability in the midst of the changing directions, methods and strategies required to fulfill organizational goals. The authors’ habit of home-growing management brings the conversation to leadership succession. “Visionary companies develop, promote and carefully select managerial talent grown from inside the company to a greater degree than the comparison companies. They do this as a key step in preserving their core” (p. 173). Collins and Porras (1994) argue that continuity of quality leadership matters and further make the bold statement that “it is extraordinarily difficult to become and remain a highly visionary company by hiring top management from outside the organization,” (p. 183).

Collins and Porras’ conclusions are supported in Zhang and Rajagopalan’s (2004) research. The authors found a positive relationship between organizational performance and relay succession. (Succession literature has posed two models for succession processes: relay succession and horse-race succession.) Relay succession involves the

identification of a senior level executive who has been the heir apparent for at least two years and is over time transitioned into the role. Instability is minimized in relay succession. Giambatista et al. (2005) offer one potential explanation by suggesting that CEOs chosen through a relay process may be more risk-averse than those chosen through a horse race. The competitiveness of a horse race scenario may lead to more aggressive behaviors by the new CEO. Horse-race succession sets up a competitive environment in which a number of potential candidates are hired and left to compete for the top role. When the top candidate is chosen, rivals often either present internal challenges to the new leader or depart, creating gaps in senior level positions of leadership—both scenarios leading to instability.

To summarize: Grusky (1960) observes that succession is inevitable for every organization (if it is to survive) and that succession always leads to organizational stability. Preservation of an organization's core ideology appears to be a stabilizing factor during times of transition. The successor versed in an organization's values, relationships and culture appears to be more able to preserve the core of a company, thus creating a better opportunity for an effective transition. Research has not adequately examined how organizations discover successor candidates who represent a good potential match to an organization nor has there been adequate observation of the complex process by which successors are "socialized" into an organization (gaining both knowledge and influence).

Succession as a Process

A third primary dimension of succession important to this study is that of succession as a process. Senior leader succession refers to a dynamic transitional process

that organizations experienced in which a senior leader known as the predecessor (in many cases a CEO) steps down from a primary position of influence and authority and is succeeded by another individual known as the successor.

The idea of process was an important focus for this study. This is stated explicitly because studies of leader succession have typically been situated as events and outcomes. Succession is a process, not an event. Organizational change in general is a “complex, dynamic process, rather than a smooth, step-wise transition from one state to another” (Blewett unpublished dissertation, 2000). A number of studies attempt to establish a model or predictable set of stages that follow one another sequentially in a neat linear process. For example, Gersick, Lansberg, Desjardins and Dunn (1999) proposed a seven stage model including preparation, trigger, disengagement, dream exploration, choice, commitment and implementation. Murray (2003) presented a seven-phase transition cycle with distinctive trigger points over a multi-year period.

Pettigrew (1985) defines process as a sequence of individual and collective events, actions and activities unfolding over time in context. He qualifies that definition by this observation: “The driving assumption behind process think is that social reality is not a steady state. It is a dynamic process . . . there is a search for patterns in the process and presumably some attempt to compare the shape, character and incidence of this pattern in case A compared to case B.” Pettigrew is observing the unpredictability to social reality.

Patrick Dawson (1997) suggests that processual research highlights the: importance of context in examining unfolding processes of change, yet, unlike contingency models, are not drawn towards unidirectional episodic theories of change . . . concepts and ideas are formulated both from the literature and generated from data-driven induction. There is not an attempt to build grand

theory nor is there a removal of preconceptualisation as suggested by some elements of grounded theory. . . . As ‘real-world’ examples of company experience, processual case studies are able to tell their own story of the way change unfolds in practice (p. 389).

Although this study will not have the benefits of a longitudinal approach, the focus of this study will be on the uneven, unpredictable process that unfolds over time. Succession is not linear. Phases or stages may be revisited multiple times in a process that most probably lasts a number of years.

This study seeks to allow succession participants to “tell their own story of the way change unfolds in practice,” (p. 389). The intent was not simply the reporting of facts but rather inclusion of the experiences, observations and context of the participants (Denzin, 1998).

The Succession Process and Succession Planning

A fourth and final dimension of succession literature considered is that of succession planning. It makes sense to consider succession process and succession planning together since both deal with anticipated paths of succession. Volumes of material have been written on the topic of succession planning (Caudron, 1999; Cespedes, 2004; Conway, 1995; Cross, 2004; Day, 2004; Ferine, 2000; Flower, 1999; Foster, 1995; Gaty, 1993; Gilber, 2004; Goldberg, 1997; Grote, 2003; Guinn, 2000; Hall, 1986; and many more). Kerr (1988) conducted a survey of 225 corporations, 70% of whom claimed to have some kind of succession planning system. Kerr cites a study by Rhodes and Walker (1984) who identified four different approaches to succession planning: informal, decentralized, centralized and integrated. Succession planning is generally viewed from two perspectives: succession planning for an unanticipated

departure (death or an immediate resignation) and succession planning for a future anticipated departure.

In general succession planning includes:

- completion of an organizational assessment in order to determine the strengths, weaknesses, needs, opportunities and threats to the organization,
- identification of the desired competencies, skills, experiences and personality of the successor as a match to the anticipated direction of the organization,
- determination of the timeframe within which the candidate needs to be ready to assume the role; if an heir apparent is within the company discussion as to what developmental plans need to be implemented to bring the candidate up to speed in the required areas,
- determination of the process of recruitment, screening and ultimate hiring of the successor,
- discussion of the transition process and the role, if any, for the departing leader.

There is some level of agreement regarding the elements of the succession process. Few business leaders dispute the importance of having conversations regarding a succession process that lead to succession planning but it appears that it is the minority of organizations that actually have a workable succession plan. In a 2000-2001 study by DMN, only 2% of 481 large companies surveyed internationally considered their succession programs as excellent; two thirds described their policies as marginal or worse (Feeny, 2003). Feeny further cites a survey conducted in 2000 by the Society for Human Resource Management that found that only 32% of the 473 organizations surveyed had any sort of formal succession plans at all.

Family business succession has received a great deal of academic attention in recent years. Family business research reveals a lack of formal succession planning. The research conducted in the family business arena has lacked theoretical and methodological rigor.

Profile/Identification/Transition of the Successor

There is a lack of consistency in perspectives taken on profile development. More description is needed as to the evolutionary process of profile development. For example, descriptive questions could include:

- What strengths, desired characteristics and experiences are essential for the successor and who gets to determine these things?
- Since no candidate is a perfect fit in all ways, what is the process for rating the relative importance of various aspects of the profile?
- What outside advisors and profile tools are utilized as a part of the screening process?
- How are individuals recruited?
- If outsiders are brought in for the role, what does the transition process look like?
- What steps were taken and how long of a transition process was undertaken to allow for leadership continuity?
- Is an individual brought in and named as heir apparent or is there a proving time to allow for closer interactions in order to see if there are both the organizational fit and proven skill level to perform the responsibilities?

Finally, the literature is lacking research that is theoretical and methodologically rigorous regarding the process by which organizations can consistently and effectively identify candidates capable of actually succeeding in the role as crafted. Leader selection is both art and science with subjective and objective aspects. An interesting question raised by Giambatista et al. (2005) is whether or not a particular type of leader (visionary, strategic, relational) can be found through a succession process. Many researchers observe that the most promising candidates can be the most spectacular failures and the less impressive candidates far more effective.

Description of Successful Transition as a Part of Succession Planning

Successful transition falls under the broad category of “consequences of succession,” in succession literature. Measures of successful transition as currently formulated are primarily economic or quantitative. For example, many studies examine the impact of succession on profitability and stock share prices for the short term. Shen and Cannella (2002) examined longer periods with three-year averages pre-succession and three-year averages post-succession. Organizational viability following the departure of a long-tenured leader, particularly a founder, is another measure of success (Haveman & Khaire, 2003). Giambatista et al. (2005) speak to the need for more longitudinal and qualitative perspectives in defining what constitutes successful transition. This study seeks to contribute additional description of what constitutes effective transition by examining the effects of succession on a number of organizational dimensions such as staff transitions. Knowledge of the organization prior to the succession could prove valuable in assessing the magnitude of changes needed in the organization. Staff retention is often regarded as positive and as a contributor to organizational stability

during a leadership transition. However, staff turnover could be a positive indicator of succession effectiveness. It is possible that a predecessor, in anticipation of his/her departure, delayed or failed to make difficult staff decisions or failed to address particular organizational issues. The successor inherited these issues and when dealing with them appears to be the preceptor of major changes when in fact the successor is simply responding to previously unaddressed issues. In this case, staff transitions may be the sign of a more successful transition.

Leadership

Leadership literature is the second major area of literature review. The convergence of succession literature with leadership literature is essential to this study for two reasons: (1) there has been a marked failure to incorporate leadership theories in the succession literature, this despite the fact that building a leadership team that outlasts one's own tenure arguably is one of the most important tasks of a leader; (2) the literature contains remarkably few direct conversations with senior level leaders, those who have actually experienced a leadership transition. These two reasons offer exciting possibilities of exploration in this study.

Succession is leadership. The succession process is a way of looking at leadership. Gordon (1984) states the case for leadership succession research as a substitute for more traditional studies of leadership:

It seems to us that cross-sectional studies of groups and leaders during periods of relative equilibrium cannot reveal the full range of variation and complexity that are part of any social system . . . the leader's effectiveness or lack therefore will be more visible during such a period. In short, there is a great deal to be gained from focusing on leadership studies during periods of change thereby encompassing organizational, situational, and leadership variables simultaneously (pp. 188-189).

Succession studies offer the opportunity for fresh exploration of leadership theories and yet there has been no differentiation in succession literature as to whether the person departing or the person assuming responsibility is a strategic leader, a visionary leader or a managerial leader (Giambatista et. al, 2005; Hitt et al. 2005). Contingency theories examining fit of leader, leadership style and performance, and the current state of the organization could be beneficial.

Giambatista et al. argue for practices of leadership as well:

We believe that a stronger grounding in organizational and strategic management theory can only benefit the succession literature, for at least three reasons. First and most importantly, the rich theory and literatures surrounding them facilitate fertile ground for new research questions. Second, theories of organization and strategy often offer the potential for competing explanations and hypotheses, which can result in particularly interesting studies and can also be of interest to a wide array of scholars. Third, applying organization strategic management theory can keep succession vibrant by maintaining its visibility to organization theorists and strategists (p. 981).

Introduction

Extensive study of leadership phenomena began in the 1930s. Four primary streams of research developed: leader trait research, leader behavior research, situational research and new leadership theory research. Trait research includes McClelland's (1961) achievement motivation theory, McClelland's (1974) social influence motivation theory and leader motive profile (LMP) and House's (1977) charismatic leadership theory. Leader behavior research was dominated by three research teams (Bales and the Harvard group; the Ohio State group and the University of Michigan group) whose primary contribution was the development of the task and person-oriented dimensions of

leadership. Situation research includes Fiedler's (1967) contingency theory, House's (1974) path-goal theory and Fiedler's (1987) cognitive resource theory.

Current Leadership Theory

Since new leadership theories have dominated both academic and more popular treatments of leadership in recent years, this study will focus most on new leadership theories. New leadership theories offered explanation of leadership phenomena left unaddressed by the other three streams or paradigms of research. Max Weber might be considered the father of new leadership theories although his work in 1945 on charisma was not really developed until the late 1970s. The new leadership theories, although offering different nuances of leadership, share several common characteristics:

1. The theories offer explanations for a leader's effect in producing outstanding organizational achievement such as the entrepreneurial effort of founding a flourishing organization, or the dramatic turnaround of a foundering organization or the accomplishment of victory or success in the face of enormous odds. Prior theories did not offer explanation for this kind of leader impact.
2. The theories offer explanation of a leader's impact on inspiring people to extraordinary levels of commitment, sacrifice, trust or respect. Again this impact was virtually unaddressed by prior streams of research.
3. New leadership theories focus on a leader's role as the manager of meaning. This ideological (small 'i' in that the ideological was very focused on certain values and beliefs not world view level values and beliefs) orientation and the focus on organizational values was not the focus of prior research.

4. The new leadership theories all focus on symbolic acts and emotionally appealing behaviors such as painting a compelling vision of the future, risk taking on the part of the leader, innovative visions and strategies, and inspiring confidence in followers regarding their own self-capacity.

Additionally the theories focus on cognitively oriented actions such as adaptability to changing situations. Clearly, succession processes could provide additional windows for viewing these aspects of the new leadership theories.

The new theories share much in common including the notion of charisma. Charismatic leaders are those who inspire followers with a compelling vision and with belief in the leader's capabilities of leading them to success. The key idea is that of the charismatic leader being perceived as exceptional. (There are two primary versions of charismatic leadership theory, Conger and Kanungo's (1998) attributional charismatic theory and House and Shamir's (1993) self-concept charismatic theory.)

Transformational leadership theory (Bass, 1985; Bass and Avolo, 1995; and Burns, 1983) is shaped differently than charismatic leadership theory. Transformational leaders change followers' beliefs about the nature and value of work and move followers from self-interest to organizational interests. Transformational leadership focuses on the distinctions between transformational leadership and transactional leadership.

Transformational behavior typically is described as: idealized influence, inspirational motivation, intellectual stimulation and individualized consideration. Idealized influence is described as charisma and is considered one part of effective leadership. Bass argues that a leader can be charismatic but not transformational. Yukl (1999) and Bryman (1993) and others note that transformational practice actually may be counterproductive

to charismatic leadership in that transformational leaders seek to develop people's confidence in themselves and their competence. Transformational leaders tend to delegate more than charismatic leaders, share sensitive information, and decentralize decision making. These practices run counter to the perception of a leader as charismatic. Charismatic leaders are more concerned with impression management, control of information and centralized influence in order to maintain the perception of being extraordinary. One question that was raised in the data analysis part of this descriptive study is: Do new leaders particularly exhibit either charismatic or transformational bents in the early days of the transition when they are seeking to establish themselves in the new role and seeking to consolidate support?

A number of conceptual weaknesses in the new leadership theories should be pointed out. One conceptual weakness is the ambiguity of the constructs. Yukl (2001) notes that it is virtually impossible to compare and contrast the theories because the constructs are so poorly defined that when used by different researchers the researchers actually describe different phenomena. The theories could be enriched by the insights of a qualitative perspective that looks at process and conversation and considers a more dynamic (versus static) approach to leadership.

A second conceptual weakness is that little attention has been given to a leader's ideology and how that ideology shapes discourse and practice. Much could be gained in examining how leadership succession and how commitment to or shifts in ideology may provide explanation for the organizational response to a succession process. Ideological congruence might be expected between the predecessor and the successor and yet how

that congruence is determined may be one of the black boxes of succession literature. This study will allow for some probing in this area.

Another conceptual weakness is that the new theories of leadership present primarily “heroic models” of leadership. Heroes need challenges, crises into which to ride with swords drawn. Sonnenfeld’s (1988) *The Hero’s Farewell: What Happens When CEOs Retire* is more than suggestive of this weakness.

Collins (2001) offers a counter perspective to the hero model by arguing that charismatic leadership in fact is counterproductive to long-term organizational success. Little research has been directed towards the transitory nature of charisma and how charisma is lost. Others suggest that once transformational leaders complete the transformation, they either need to leave or to create another crisis to once again do the work of transformation.

There are some theories of leadership in which leaders are humanized, not idealized in terms of their contribution and in expectations placed upon them. Greenleaf’s theory of servant leadership, George’s (2003) treatment of authentic leadership, Galford’s and Drapeau’s (2002) discussion of the trusted leader and Collins’ (2001) theory of Level-Five leadership all exemplify recent recognitions of less heroic, situational/contingency models of leadership and view the leadership endeavor as that of human transformation where empowerment (in the sense of helping people develop their sense of worth and capabilities) and recognition (where they are willing to consider the vantage points and unique contributions of others) are valued.

Succession literature could benefit from description of how “follower” perceptions of a leader impact a transition process. In other words, if a leader is viewed as

extraordinary and a leader has fostered this belief (charismatic leadership theory) versus transformational leaders who foster follower belief in follower capability, does the departure of a charismatic leader appear more traumatic and destabilizing than the departure of non-charismatic leaders? Charismatic leaders have inspired belief in their distinctive capability to lead. Could this belief by followers prove counterproductive to transition? Additionally, if Robert House's (1999) assumption is correct that the new leadership theories are focused on self-interest, what does this imply regarding a predecessor seeking to build or erode confidence and loyalty to a new leader? "Leader shadow" can loom large in organizations. These few examples seek to illustrate how the literature could benefit from examination of leadership theories in light of succession processes.

Level-Five Leadership

There is little literature that addresses the phenomenon of long-tenured leaders who are vocationally successful and maintain positive relationships with others such that people like being around them. One theory of leadership that does provide potential for exploration is Collin's theory of Level-five leadership. "Level 5" refers to "the highest level in a hierarchy of executive capabilities that we identified during our research," (Collins, 2001, p. 28). The hierarchy is as follows:

- LEVEL 5: EXECUTIVE: builds enduring greatness through a paradoxical combination of personal humility plus professional will.
- LEVEL 4: EFFECTIVE LEADER: Catalyzes commitment to and vigorous pursuit of a clear and compelling vision; stimulates the group to high performance standards.
- LEVEL 3: COMPETENT MANAGER: Organizes people and resources toward the effective and efficient pursuit of predetermined objectives.

- **LEVEL 2: CONTRIBUTING TEAM MEMBER:** Contributes to the achievement of group objectives; works effectively with others in a group setting.
- **LEVEL 1: HIGHLY CAPABLE INDIVIDUAL:** Makes productive contributions through talent, knowledge, skills and good work habits.

Collins and team uncovered the idea of Level 5 leadership in the context of a massive research project that led to the publication of the best seller, *Good to Great*. That research focused on what differentiated enduringly great companies from good companies. Great companies without exception had long-tenured leaders. Collins was not looking for some new notion of leadership—it was a totally out-of-the-blue discovery. He started with the results, great companies, and then worked backward. He asked, “What was different about these companies?” The leadership traits came to light. In fact, the leadership findings were so dominant that the research team initially looked right over them. Further analysis of the data, however, made the leadership finding overwhelmingly obvious. Level 5 so directly correlated to the data it could not be ignored. It was not that most of the top companies had Level 5 leaders but rather every one of them had a Level 5 leader. There was one-to-one correlation in 100% of the cases. It was attention-getting because the data ran so strongly counter to leadership literature and conventional wisdom.

Collins (2001b) writes, “Level 5 leaders are a study in duality: modest and willful, humble and fearless,” (p. 25). Collins says that a key trait of Level 5 leaders is:

ambition first and foremost for the company and concern for its success rather than for one’s own riches and personal renown. Level 5 leaders want to see the company even more successful in the next generation, comfortable with the idea that most people won’t even know that the roots of that success trace back to their efforts (p. 26).

The second key trait of Level 5 leaders is what Collins calls “a compelling modesty.” Collins (2001b) writes:

In contrast to the very I-centric style of comparison leaders, we were struck with how the good-to-great leaders didn't talk about themselves. During interviews with good to great leaders, they'd talk about the company and the contributions of other executives as long as we'd like but would deflect discussion about their own contributions . . . it wasn't just false modesty. Those who worked with or wrote about the good-to-great leaders continually used words like *quiet, humble, modest, reserved, shy, gracious, mild-mannered, self-effacing, understated, did not believe his own clippings*; and so forth (p.27).

Contrasting many of the new leadership theories that promote a heroic model of leadership, Collins notes that good-to-great leaders, "never wanted to become larger-than-life heroes. They never aspired to be put on a pedestal or become unreachable icons. They were seemingly ordinary people quietly producing extraordinary results." (p. 28). In more than two-thirds of the comparison companies, Collins' team observed the presence of a "gargantuan" personal ego that contributed either to continued lack of performance or ultimately to the demise of the company.

The notion of Level 5 leadership is intriguing as it assumes certain competencies and skills but rather than attempting to be a meta-leadership theory it focuses more on who a person is and is becoming. House (1999), one of the prime developers of the charismatic leadership theories, acknowledged that most contemporary theories of leadership are focused towards self-interest.

The reason for incorporating this theory into this study is that ultimately when one talks about leadership succession, the conversation is about how to build enduring greatness into an organization. To bring the correlation more clear, Collins' findings run strongly counter to the false assumption that boards often operate under, that they need to hire a "larger-than-life egocentric leader to make an organization great," (p. 37). He speculates that this is why Level 5 leaders rarely appear at the top of our institutions.

One way of integrating leadership and succession literature would be to ask: Is it possible that Level 5 leaders' traits of (1) ambition first and foremost for the company and for its success rather than for one's own riches and personal renown and (2) compelling modesty actually create both a more compelling environment for aspiring leaders and the greater probability of transition success?

If Level 5 leaders are so desirable in organizations, particularly in organizations that have core value congruence with Level 5 theory, then a crucial question is: How do organizations identify this kind of leader? Collins' theories as to how to identify leaders may have application to succession literature. In a personal conversation regarding this question, Collins responded that leader identification is always difficult but two areas in particular bear examination by those conducting a leader search: leadership markers and mentor selection. In the first area, Collins identified six markers, restated as questions:

1. What kind of leadership roles did they seek out and how often? Early on Level 5 leaders sought out leadership roles when they didn't have to. They sought out leadership roles in the neighborhood, clubs, school.
2. Did they invest time in something that could be bigger than themselves rather than trying to be a big shot?
3. Do they have a track record of success? There is a close correlation to this. Was there success in the organizations they sought to lead even it was the chess club or basketball team?
4. Were they willing not to take credit for success? Level 5 leaders point out factors beyond themselves such as, "I had a great team around me, great athletes." This is huge because usually when people are immature, Level 4s tend to take the prime spot.
5. Did they set up their successors for success because they care more about the success of the organization more than their own personal success? Do they care about what happens to the organization after they leave?

6. Do they endure the pain of leadership without complaining and take criticism in stride without feeling the need to defend themselves? In other words, Level 5s are not martyrs.

The second area related to leader choices of mentors. Collins' findings from the extensive data his team gathered was that future Level 5s pick current Level 5s even though they may not know why. In his words, "This finding is quantifiable." Level 5 theory offers strong potential for the integration of leadership theory with succession literature.

To sum up, both succession literature and leadership literature are enriched by a study that integrates these two important streams of literature. Further, in reviewing over 700 articles and books, there are few studies that include first hand accounts from those leaders most immersed in the transition process (CEO, former CEO, CFO or some other senior staff member and a board member). This study provided the opportunity to provide leader narratives regarding the journey of succession.

Leadership Succession in Churches

Recruitment and Selection of Successors

There are a number of books and articles written on a popular level as to how a church goes about recruiting and selecting a successor. These include books by Oswald, Heath and Heath (2003); Cionca (2004); Weese and Crabtree (2004); and Mead (2005). However, the literature is directed towards smaller churches. The selection process in smaller churches tends to be more hands on, involving the entire congregation. Successors are chosen from a large pool of potential successors. In contrast, the level of expertise and experience for the directional leader of a megachurch are highly

specialized. The successors are chosen from a small pool of potential successors who have the high level of skills and experience required by megachurches. It raises the question: what are the internal developmental processes at megachurches for directional leaders and from where these potential leaders come? How are they identified and then recruited? This study provided the opportunity to document the practices of several megachurches that have recently been through this process.

Weese and Crabtree's (2004) book is based on their extensive consulting experiences in working with churches on succession issues. They identify the five key players in healthy transition as: the departing pastor, the board, the transition consultant, the personnel committee, and the arriving pastor. They define a healthy pastoral transition as, "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," (p. 41). Weese and Crabtree offer different transition strategies based on their construct of four church cultures: family, icon, archival and replication. These constructs are not theory-based but rather based on general categories formed by the authors' experiences. They suggest that the components of a transition plan include: strategic planning, the search process and the asset-preserving ministry. Depending on the relationship of the predecessor, they suggest three options for the relationship between the predecessor and the successor: firewall (no contact), downloading (short-term orientation) or mentoring (ongoing relationship).

Church studies on transition include a number of dissertations (primarily Doctor of Ministry dissertations). Taylor's (2000) dissertation examined a model for transition

after the retirement of a long-tenured pastor. This study was not conducted within the megachurch setting and is not theoretically or methodologically rigorous. It offers observations on potential problems faced during pastoral transitions such as lack of succession planning, retirement planning, predecessor interference and a predecessor failing to exit in a timely manner. Church problems include the loss of momentum during an interim period, a vacuum of leadership that results in other leaders in the church seeking to seize power and lack of organizational knowledge. The author developed a “biblical model” of a leader choosing his successor.

Owens (2000) conducted a descriptive case study of leadership styles and organizational types in the transition from the founder to the successors in the Church of God in Christ. The title reveals the nature of the experience, “The Dark Years.”

Houck (1998) explored factors that contribute to trust formation between a pastor and a parish. The study is a scriptural and personal belief statement for a D. Min. dissertation and lacks both methodological and theoretical grounding. The author offers common sense suggestions such as “decide the ability of the pastor to meet the perceived role expectations and needs of the congregation,” and “trust is an act, not a feeling.”

Schooling (1999) conducted an analysis of the effects of pastoral leadership behaviors on psychological contracts and source credibility when implementing change. Schooling documents violations of psychological contracts in the process of change such as the failure to communicate the possibility of change. The overriding question was how a pastor successfully implements change in a local church.

Again, these studies in general are situated in smaller churches where there is greater interaction between the majority of members of the church and the senior pastor.

This study will focus specific questions on the transitional period from the perspective of the predecessor, successor, resident senior staff member and a board member.

Megachurches

Introduction and Definition

There are an estimated 320,000 Protestant churches in the United States (Barna, 2004). The median congregation size is 200 and the median number of people regularly participating is 110 (Woolever & Bruce, 2002). Only 10% of American congregations have more than 350 regular participants and yet these congregations account for approximately 50% of religious worship attendees (Chaves, 2002) each week. Less than 2% of Protestant churches have more than 1,000 people present in weekly worship (Barna, 2003). A megachurch is a church with more than 2,000 in weekly worship. These churches represent less than .3% of all Protestant churches and yet account for more than four million weekly attendees (Thumma, 2005).

According to Scott Thumma, one of the recognized authorities on the megachurch and of the Hartford Institute for Religion Research, super-sized churches have always existed but at no point in history were there more than a dozen of these churches worldwide. Nearly all megachurches were founded after 1955 (Vaughn, 1993). By 1960 there were sixteen of these churches (Thumma, Travis and Bird, 2006). In the 1980s there was a tremendous acceleration in the numbers of these large churches such that by 1992 there were over 350 of these churches identified (Thumma, 1993). The Megachurches Today 2005 survey conducted by the Hartford Institute of Religion and Leadership Network indicated that there are now more than 1200 Protestant churches

meeting the criteria for megachurch. (Only seven percent of these are in New England and the Mid-Atlantic). This is almost double the number of megachurches identified in 2000 (Thumma et al., 2006) and the number continues to grow. All of this argues to the point that megachurches are a relatively new social organization and the literature is in the early stages of development. The vast majority of megachurches have not yet experienced a senior pastoral transition. The last two statements point to the practical and theoretical benefits of this study.

Three research projects on megachurches bear mentioning. Guffin (1999) examined the key factors that may have led to the rapid proliferation of megachurches. The author identified five major factors from the time period 1960-1978 that greatly influenced the rise of the megachurch movement in America:

1. The revolution in religious broadcasting,
2. The work and teachings of Robert H. Schuller,
3. The charismatic renewal movement,
4. The Jesus movement, and
5. The church growth movement.

Dalton (2002) conducted a major study regarding what factors attract people to attend and then to remain in a megachurch congregation. Dalton focused on attitudes and behaviors within the narrow range of beliefs of a single faith tradition. Dalton's study collected substantive data that contribute to an understanding of religious choice in a consumer oriented society and in turn the orientation of the megachurch as a provider of human services.

Thumma et al.'s (2000) more current research does not identify any of the factors named by Guffin as contributing to the current rapid proliferation of megachurch congregations but rather enlarges Dalton's insights. Thumma et al. argue that society has

shifted to feeling comfortable with large-scale institutions that provide a myriad of choices such as the choices provided in universities of thirty and forty thousand. The megachurch is a seven-day-a-week operation, there to respond not simply to spiritual needs, but also to the life needs of people. Most megachurches have a multitude of social services and outreach ministries. Thumma et al. believe that the ability to change and adapt to the culture is one of the primary reasons why megachurches continue to grow.

Senior Leadership in Megachurches

The nature of leadership in the megachurch context has many corollaries in the corporate arena. One of the common critiques of megachurches is the “corporateness” of their operations. Megachurches have complex differentiated organizational structures. Multi-million dollar budgets, vast facilities and properties, hundreds of ministries, large numbers of staff, and potentially thousands of volunteers present a level of complexity that requires skilled, visionary leadership.

Megachurches are typically led by a directional leader called a senior pastor. This leader must possess exceptional communication and leading skills. Although senior pastors vary greatly in terms of gifts, leadership styles and personality, in general they are responsible for overall ministry direction and vision. Organizations tend to be reflections of the senior leader and management team (Hambrick & Mason, 1984; Miller, Kets De Vries & Toulouse, 1982) and megachurches are no exception (Thumma et al., 2006). The senior pastor has tremendous influence in shaping the values and the vision of the church. If in addition, a senior pastor is also the founding pastor of the church or has had a long tenure, there is a disproportionate level of influence in comparison to other senior pastors lacking “founder’s rights” or long tenure. Senior pastoral succession may also represent a

unique case because the nature of the job is substantially different from other organizational positions. As Kesner and Sebra (1994) observed of the CEO job, it could be also observed of the senior pastor, “the job is idiosyncratic, non-routine, and unstructured . . . there is nothing typical about the typical directional leader,” (p.366). This raises some of the challenges of finding suitable successors for megachurches.

Zook (1993) examined leadership practices in large, protestant congregations. He developed a tool to analyze leadership practices. The tool was based on the Leadership Practices Inventory (LIP-SELF) developed by Kouzes and Posner (1988). The inventory rates five leadership practices: challenging the process, inspiring a shared vision, enabling others to act, modeling the way, and encouraging the heart. Zook writes:

Pastors reflected higher mean scores for each leadership practice and a smaller overall standard deviation. Pastors and business leaders were found to be strikingly similar when comparing the interview narratives with the business leadership literature. The most prominent difference was that pastors were found to have higher regard for personal authenticity, vulnerability and transparency than their business counterparts. The groups compared favorably on integrity, humility, the value of people, perseverance, and responsibility. Pastors were also similar in their emphasis on mission, vision, strategy, motivating staff, modeling core values, confronting conflict and taking risks. This study indicates, that overall, pastors of megachurches were similar to each other in their leadership practices (Zook, p. v).

Collins (1995), in his brief work applying the findings of *Good to Great* in the social sectors, does note an important difference between leadership in the business setting and the social sector: leadership in the social sector often has to figure out how to make decisions and get things done with a diffuse power structure. There are a variety of governance structures within megachurches but a common factor is that the constituents, the attendees, have real influence by how they give, attend and in some cases vote. A parallel situation is one that Collins mentions regarding one corporate CEO who became

a faculty dean. He applied his business sense and tried and failed to lead faculty towards his vision. They had tenure. He wasn't going to fire them. "He did not understand—until it was too late—what one university president called the reality of tenured faculty: 'A thousand points of no'" (Collins, 2005, p. 10).

The complex governance and diffuse power structures that are common in the social sectors led Collins to hypothesize that there are two types of leadership skills: executive and legislative.

In executive leadership, the individual leader has enough concentrated power to simply make the right decisions. In legislative leadership, on the other hand, no individual leader—not even the nominal chief executive—has enough structural power to make the most important decision by himself or herself. Legislative leadership relies more upon persuasion, political currency, and shared interests to create the right decisions to happen (Collins, 2005, p. 11).

Collins acknowledges that this distinction is a working hypothesis and further suggests that the most effective leaders will show a blend of both executive and legislative skills.

The distinction that Collins draws is an important factor when considering the development of successor profiles. Working with a governance board in the church setting is a role that often is not experienced by leaders until they actually step into a senior pastoral role. Further, it is often not until they are in the directional role that they in turn work in the dynamic of leading a voluntary organization. Collins writes:

As James MacGregor Burns taught in his classic 1978 text, *Leadership*, the practice of leadership is not the same as the exercise of power. If I put a loaded gun to your head, I can get you to do things you might not otherwise do, but I've not practiced leadership; I've exercised power. *True leadership only exists if people follow when they have the freedom not to.* If people follow you because they have no choice, then you are not leading (Collins, 2005, pp. 12-13).

Today's congregations are much more mobile than they were even 20 or 30 years ago when loyalty to a church superseded loyalty to a person. As many churches have discovered, the failure to carefully and thoughtfully navigate a senior pastoral change can have a profoundly negative effect.

Succession/Transition in Megachurches

This study is vital because the phenomenon of transition is relatively new in megachurches and because of the number of leadership changes that will occur over the next two decades. Many megachurches will be facing their first directional leader transition. This transition will be challenging not simply because their senior pastor has long tenure but also because he/she is the founding pastor of the church.

As was stated at the beginning of this study, if long tenure is introduced as an element of the succession process, the infrequency of change represents a lack of decision-maker knowledge as to how to approach a succession process. The visibility of a senior pastor as well as the influence that accompanies the frequent if not primary public communication suggest that the departure and then succession of this leader will be a defining process in the life of a congregation. Martinez (1997) cites a powerful example in his study, "The Rise, Decline and Renewal of a Megachurch: A Case Study of Church of the Open Door." Dr. J. Vernon McGee was a larger-than-life figure with a national radio broadcast. The Church of the Open Door was one of only a dozen or so megachurches in the U.S. during the 1950s and 1960s, swelling to over 4,000 members. Within ten years of McGee's departure in 1970, the church was at just over 500 members. There are multiple reasons for this dramatic decline, two of which were related to succession and core identity issues.

Collins and Porras (1997) argue that continuity of quality leadership matters if organizations are to stay vibrant and successful. They speak for a continuity that preserves the core of an organization. The authors believe that when something in the leadership continuity loop is missing organizations look outside. Missing elements may include management development and succession planning; strong internal candidates; continuity of leadership excellence within; or preservation of the core/stimulation of progress.

Simply put, our research leads us to conclude that it is extraordinarily difficult to become and remain a highly visionary company by hiring top management from outside the organization. Equally important, there is absolutely no inconsistency between promoting from within and stimulating significant change. If you're the chief executive or board member at a large company, you can directly apply the lessons of this chapter. Your company should have management development processes and long-range succession planning . . . do not fall into the trap of thinking that the only way to bring about change and progress at the top is to bring in outsiders who might dilute or destroy the core. The key is to develop and promote insiders who are highly capable of stimulating healthy change and progress while preserving the core (p. 183).

These findings were first published in 1994, seven years before the publishing of *Good to Great*. The strength of Collins and Porras' remarks provide important context for this study and the need to examine where it is that megachurches are looking for their next directional leader as well as what these churches are doing to develop leaders within the context of their own churches.

An area for interview conversations relates to Collins and Porras's (1997) idea of core ideology, the basic precepts that declare, "This is who we are, this is what we stand for, this is what we are all about." It is not known if core ideology is well defined in megachurches. If it is, how does a church discover if potential successors embrace that same ideology? Little has been written on this subject in the church arena other than

several works considering factors contributing to success or failure following a long-tenured leader (Danielson, 2001; Fisher, 2003). Danielson's work provided some help in designing interview questions. In the study Danielson interviewed 20 pastors who followed a long-term predecessor with the following research questions: What common themes emerge in stories pastors tell of following a long-term predecessor? What factors do pastors identify in a successful and unsuccessful transition? How well are pastors who have followed a long-tenured predecessor able to identify the factors that led to a successful or unsuccessful transition?

One question looms large: How does a church discover a leader with exceptional skills and experience, ideological congruence and cultural fit? What characteristics take precedence when there are not viable candidates that match the church's need? If the organization is in a time of crisis or decline, what steps are taken to guard against being seduced by a charismatic, larger than life, dynamic communicator without regard to the relational, ideological and organizational dynamics that individual might bring with him/her? Two possible questions raised by Level 5 leadership theory are: Do personal humility coupled with fierce resolve and selflessness "show up" in conversations with megachurch leaders and in the profile of the successor. If so, do Collin's suggested tools for Level 5 leader identification show up in successor identification processes? (The two tools: examining six markers of leadership and identifying the individual's mentors.) If leader socialization is such an important factor in successful transition, by what process are potential successors evaluated prior to hiring and then socialized once hired?

To sum up, this study examines leadership succession in the context of megachurches and incorporates leadership theory.

Research Questions

General Questions:

- What is the succession process in megachurches?
- What factors influence the presence of a succession plan or the lack of a plan? If there is a plan, does the actual process differ from the process of those churches that do not have a plan?

Supplemental Questions:

- What are the actions, events, beliefs, attitudes, social structures and processes of a senior pastoral transition? Who are the key players?
- Do any succession conversations or succession planning occur before the first knowledge of a coming transition? Does the presence or absence of these appear to make any difference in the outcomes?
- How is the successor profile developed? What contextual elements/ organizational values were regarded as most important and how did those elements shape the desired successor characteristics? What organizational antecedents shape the succession process?
- What do successor profiles reveal about beliefs regarding the senior leader and that leader's influence?
- How is a successor identified and selected? Are any tools available to identify particular leadership and personal traits?
- What is the process identified for selecting the successor? What is the process actually followed? Does the actual selection process vary from the anticipated process and why? What voices are present or absent in this process?
- What are the challenges that occur in a succession process and how are these challenges addressed?
- If socialization/home grown leadership is considered important, how does socialization/orientation/mentoring take place? What is the role of the predecessor? What is the relationship between the predecessor and successor?
- What is taken as evidence of a successful succession?
- What differences exist between succession processes in megachurches?

CHAPTER 3

RESEARCH METHODOLOGY

Qualitative Methods: Why Use Qualitative Methods in the Intersection of Leadership, Succession, and Megachurches?

Examination of the processes of succession and the nature of the proposed research questions favored a qualitative approach. Since this study attempts to holistically describe what is going on and to build a knowledge base for developing theory rather than test hypotheses, the methodology adopted sought to maximally allow for serendipitous discovery, description and explanation. Historically, qualitative methodology has been considered most appropriate in the exploratory phases of a research subject. (More scholars, including those in the leadership field, are now recognizing that qualitative methods offer the opportunity for significant insights regardless of the phase of research.) The intersection of leadership, succession and megachurches is a research subject in its exploratory phase.

Qualitative methods offer the opportunity to examine a range of social phenomena. Bryman (2001) states that qualitative research emphasizes:

- seeing through the eyes of research participants;
- description and context;
- process;
- flexibility and lack of structure; and
- concepts and theory as outcomes of the research process (pp. 277-281)

A Perspective on the Nature of Qualitative Research

This study is a qualitative descriptive study seeking to increase understanding as to the process of leadership succession in megachurches. In keeping with the assumptions of qualitative research, the design of this study was not to construct a single account of leadership and organizational change nor to derive a causally linear model of the succession process. As Pettigrew (1997) notes: “In holistic explanation causation is neither linear or singular. The search es not for single grand theories.” As Tilly (1984) indicates, the pursuit was for proximate not final causes. Or as Ragin (1987) contends, “The search is for multiple intersecting conditions which link features of context and process to certain outcomes,” (pp. 341-342).

These statements reflect a perspective of research in the social world that could be compared to a perspective of viewing great art. In viewing great art, there is no one, pure, unadulterated, correct interpretation. Rather there is openness to seeing different things and to a multiplicity of explanation. This openness grows out of an epistemology shared by many qualitative researchers which could be described as interpretivist and an ontology which could be described as constructionist.

This view of the social world suggests that there is no one true reality out there in the social world. Rather, perceptions of the social world are all interpretive and actually constructed by the participants. “Participants” include the researcher who is attempting to understand particular phenomena. The researcher is not an independent entity standing in a position of stark, detached objectivity to the subject. Rather the researcher has

influence in the research process and in research findings since it is impossible to separate interpretation from the process of participation and discovery (Pettigrew, p. 339).

Qualitative Study and Real-Life Experiences

This study sought to surface the real-life experiences and conceptual frameworks of those who have “lived” through a process of leadership succession. Succession is not an event (the arrival of the successor) but rather is a process that unfolds over a long period of time (generally over several years). This succession process most probably includes confusion, uncertainty, messiness, sudden stops and starts, as well as periods of no apparent activity. This process does not end when the successor assumes his/her role. In fact, at that moment a more dramatic process of succession begins.

This qualitative study was interested in the point of view and the lives of the participants as they lived through these processes. Marshall and Rossman (1999) write:

Qualitative researchers are intrigued with the complexity of social interactions as expressed in daily life and with the meanings the participants themselves attribute to these interactions. This interest takes qualitative researchers into natural settings rather than laboratories and fosters pragmatism in using multiple methods for exploring the topic of interest. Thus, qualitative research is pragmatic, interpretive and grounded in the lived experiences of people (p. 2).

Rossman and Rallis (1998) note that qualitative research is naturalistic, draws on multiple methods that respect the humanity of participants in the study, is emergent and evolving, and is interpretive. They further note that qualitative researchers view social worlds as holistic or seamless, engage in systematic reflection on their own roles in the research, are sensitive to their personal biographies and how these shape the study, and rely on complex reasoning that moves dialectically between deduction and induction.

Qualitative Study and Assumptions Regarding Leadership and Organizational Life

Assumptions regarding the nature of leadership and organizational life also drive the choice for qualitative methodology. Leadership and organizational life are dynamic not static, complex versus simple, and often non-sequential versus linear. Social reality is not a steady state. It is a dynamic process (Pettigrew, 1997). Social reality occurs rather than exists (Sztompka, 1991). The succession process reflects this perspective of organization as organism and thus the word “process” has been used intentionally to describe this study. Qualitative study allows us to look at the *process* and see this *process* through the eyes of research participants.

Conger (1998), one of the key influencers in the development of leadership literature over the past two decades, argues for the importance of qualitative study of leadership. He claims that although his quantitative study has provided a great breadth of leadership findings, quantitative study alone can never plumb the depths of leadership phenomena. Quantitative leadership studies, bound by assumptions of validity and reliability (construct, internal, external, ecological validity issues), are forced to focus primarily on one dimension of leadership phenomenon (such as the behavioral dimension) or on a trait or practice. The social world is a tapestry and although one could pull a thread out of the tapestry and examine it, the thread, out of the richness of context and interaction, would be stripped of richness and the hues of its meaning.

Conger (1998) argues that leadership is incredibly complex and layered, “embedded in nests of phenomena.” Leadership layers, leadership’s dynamic nature, and the process orientation of leadership all argue for the need for qualitative research. He suggests that quantitative research can not get at leadership processes. He argues as well

for the need, from a practitioner side, for less reductionistic accounts of leadership process. Conger (1998) speaks to the value of qualitative studies, though once dismissed as “nonscientific,” as actually providing a depth of study that quantitative studies cannot provide. They provide the opportunity for discovery of unexpected phenomena; they offer the opportunity to view processes rather than minute slices of leadership life; and they allow for the exploration of symbolic behavior. Ferlie and McNulty (1997) write as well for support of examination of leadership processes:

Users are attracted to the perceived relevance of process research as contemporary organizations increasingly go through complex changes programs where linear and rational models of intervention recurrently fail (p. 385).

Ragin and Becker (1992) speak of the limitations of deterministic quantitative perspectives including the problem of measurement errors as well as the additional problem of complex multivariate causal patterns:

Complex multivariate causal patterns operate in the social world such that a given outcome can occur because of the presence of more than one independent variable and, moreover, may not occur at times because of the influence of one independent variable is outweighed by other influences working in the opposite direction. Under such circumstances, the influence of X_1 is only approximate (even without measurement errors), unless one can consider all of the other independent variables, through controls or otherwise. Furthermore, we often do not know or cannot measure all of the factors that we think will influence Y . As a consequence, we are obliged to give up on a deterministic *measurement* of the influence of X_1 on Y (p. 106).

This complexity of which the cited authors and others speak is particularly evident in the study of leadership successions. Arguably, succession is one of the most important aspects of a leader’s responsibility (Freeman, 2004) and yet, as has been argued, the succession literature largely fails to incorporate theories of leadership. Perhaps this void is merely reflective of the current practice of leaders in general of failing to plan for the

future. Is it possible that it is the exceptional few leaders that engage in intentional planning for succession and the grooming of potential successions? Of the hundreds of leadership books and articles reviewed for this study, only a handful speak to the responsibility of the leader to plan for his/her eventual departure. Collins (2001) is one researcher who does address this aspect of leadership life. Collins, speaking in the context of his construct of Level 5 leadership, writes:

One final, yet compelling, note on our findings about Level 5: because Level 5 leaders have ambition not for themselves but for their companies, they routinely select superb successors. Level 5 leaders want to see their companies become even more successful in the next generation, comfortable with the idea that most people won't even know that the roots of that success trace back to them. As one Level 5 CEO said, "I want to look from my porch and see the company as one of the great companies in the world someday, and be able to say, 'I used to work there.'" By contrast Level 4 leaders often fail to set up the company for enduring success—after all, what better testament to your own personal greatness than that the place falls apart after you leave. (p. 34)

Little research has been conducted on leadership in the megachurch arena and even less on leadership succession in megachurches and this despite anecdotal, retrospective accounts by those who have lived through successions who speak of the magnitude of impact that senior pastor transition has on churches in general. This qualitative study sought to describe what happened in these transitions and how they unfolded as well as to hear the experiences of those who lived through such transitions.

Overall Strategy: A Multiple Case Study Approach

Case Studies

The proposed approach was to conduct qualitative case studies. Each case study was multi-method and included: in-depth interviews, document and media review, archival review, and a brief survey to fill in organizational details. The case study

approach is particularly appropriate for studying organizational processes. Since there is much ambiguity regarding the term, “case study,” the following section will:

- define the term as used in this study,
- discuss the value of case studies to study leadership succession, and
- address several other issues relevant to a multiple-case approach.

Method or Approach?

Hamel (1992) raises the important issue as to whether in fact the case study is a method or an approach.

The case study immediately mobilizes various methods such as the interview, participant observation, and field work, so as to reconstitute and analyze the case in question from a sociological point of view. Thus, it is probably more appropriate to define the case study as an approach (p. ix).

Bennett and George (1997) similarly observe:

No one case study design is appropriate to all possible casual assertions, modes of theory building and research objectives. Instead, there are many types of case study research designs adapted to different purposes, including designs for single case studies, comparative case studies, and case studies of most and least likely cases, most and least similar cases, and crucial cases (p. 1).

Definition of a Case Study

Ragin (1992a) observes that “the biggest obstacle to clear thinking about ‘what is a case?’ is the simple fact that the term ‘case’ is used in so many different ways” (p. 217). Rather than give a lengthy taxonomy of definitions, Ragin proposes a concept which he calls “casing.” He argues that it is impossible to do research in a conceptual vacuum.¹

¹ The empirical world is:

limitless in its detail, complexity, specificity, and uniqueness . . .we can make almost any everyday social category problematic . . .we make sense of its infinity

Ragin's concept is that case studies involve a process (casing) in which the interplay between ideas (theory) and evidence are linked. Case studies are a process in which theory seeks to make sense of evidence and evidence is applied to sharpen and refine theory.

Casing is an essential part of the process of producing theoretically structured descriptions of social life and of using empirical evidence to articulate theories. By limiting the empirical world in different ways, it is possible to connect it to theoretical ideas that are general, imprecise, but dynamic verbal statements. In this perspective a case is most often an intermediate product in the effort to link ideas and evidence. A case is not inherently one thing or another, but a 'way' station in the process of producing empirical social science. Cases are multiple in most research efforts because ideas and evidence may be linked in many different ways (Ragin, 1992a, p. 225).

The following definition is offered for the term, case study, as used in this study.

A case study is an intensive study approach utilizing multiple methods and research paradigms (quantitative and qualitative) to examine specific individuals, organizations, or contexts for a defined purpose within a defined unit of analysis

by limiting it with our ideas. In effect, theoretical ideas and principles provide ways to see the empirical world and to structure our descriptions of this world. In this light, empirical research can be seen as culminating in theoretically structured descriptions—understandings that result from the application of constraining ideas to infinite evidence. Theoretical ideas, by contrast, are relatively simple . . . this apparent simplicity, however cannot mask the complexity that derives from the fact that theoretical formulations are verbal and thus abstract, incomplete and tentative at best theory provides an initial image, a vague starting point for looking at empirical evidence. Even though they are all that we have, theoretical formulations are remarkably feeble devices for structuring description—for generating the results of social science. Thus, we often use empirical evidence to articulate theories, to flesh them out . . . in short, ideas and evidence are mutually dependent. . . Making something into a case or "casing" it can bring operational closure to some problematic relationship between ideas and evidence, between theory and data. (pp. 217-218).

(Eisenhardt, 1989; Merriam, 1988; Powers & Knapp, 1990; Yin, 1994).² It can be exploratory, explanatory, or descriptive in its orientation. A case study may be categorized by the epistemology of the researcher and research framework and may be applied to a diversity of philosophical approaches to research (Winegardner, n.d.). Platt (1992), in reflecting on Yin's works, suggests that shared features of case studies are the "study of one or a small number of cases, the collection of data by any—and probably multiple—means and a logic of generalization that is different from that of sampling" (p. 45).

The Importance of a Multiple Methods Approach

A multiple-methods approach, such as the case study approach is particularly appropriate to this study because of what Conger (1998) describes as the "extreme and enduring complexity" of social science phenomena. There are multiple levels of social science phenomena. The dynamic situational character of real life settings in megachurch succession processes make a purely quantitative or single method approach

² Yin (1994) offers both definition and description:

(1) A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident . . . in other words, you would use the case study method because you deliberately wanted to cover contextual conditions . . .

(2) A case study inquiry copes with the technically distinctive situation in which there will be many more variables of interest than data points, and as one result relies on multiple sources of evidence, with data needing to converge in a triangulating fashion, and as another result, benefits from the prior development of theoretical propositions to guide data collection and analysis. In other words, the case study as a research strategy comprises an all-encompassing method—with the logic of design incorporating specific approaches to data collection and analysis (p. 13).

less optimal for investigation. Again, this study examined social processes that are dynamic in nature. Achievements, failures, opportunities, crises, and the unpredictability of human behaviors constantly reshape social settings. Qualitative case studies offer an approach that can track in rich detail how events have unfolded or how individuals may have reshaped interpretations of events. Unlike some quantitative approaches, they are not bound to measure only static moments in time (Conger, 1998). Case studies offer the opportunity for some immersion into social settings and therefore more opportunities to capture “process” versus a “point in time.” Ferlie and McNulty (1997) observe: “Process research can be defined as the dynamic study of behavior in organizations, focusing on organizational context, sequences of incidents, activities and actions which unfold over time,” (p. 368).

Case studies oriented around organizational process can make an important contribution by interlinking variables in context specificity, thus offering a more holistic examination of phenomena in real-life settings. Qualitative case studies lend themselves to serendipitous findings and are perhaps more suited than other approaches for in-depth analysis of contemporary events. For example, Yin (1994) argues that case research is superior to survey methods at answering the “whys” and “hows” because the case analysis can delve more deeply into motivations, meanings and actions than structured surveys. This is particularly true when in-depth interviews are a part of the research design. Ragin (1987) writes:

One of the most valuable features of the case-oriented approach . . . is the fact that it engenders an extensive dialogue between the investigator’s ideas and the data. Each case is examined as a whole, as a total situation resulting from a combination of conditions, and cases are compared to each other as wholes (p. 49).

Appropriateness of the Use of Case Studies to Study Leadership Succession

One of the tasks of the researcher is to design a methodological approach that best allows examination of the social phenomena. The decision to use a case study approach for this study arose out of the desire to understand the complex social phenomena of leadership succession. This not only had utility in terms of an approach for this study but also has the potential of making a contribution to the field of leadership succession. This is the case because methodology in succession research has been “overwhelmingly quantitative/empirical and archival” (Giambatista et al., 2005, p. 983). There has been low reliance on interview methods.

The design of this study consisted of face-to-face, in-depth conversations with those most deeply involved in the process of succession. Again, the perspectives of those who have lived the process are perspectives that are largely missing in the succession literature. This study conversed with those most impacted by the succession process including the predecessor, the successor, a senior staff person, and a board member. The researcher asked for permission to interview one additional key congregant in each church who could provide additional insight. These key congregants had long tenure and significant involvement in the church. It was desired that examination of documents, media and archival information would allow for investigation and a perspective from other moments in time during the process of transition. These methods were believed to provide useful comparison of past perspectives with the interviews which are more retrospective in nature. However, few of these documents were actually available. “In brief, the case study allows an investigation to retain the holistic and meaningful characteristics of real-life events—such as individual life cycles, organizational and

managerial processes, neighborhood change, international relations and the maturation of industries,” (Yin, 1984, p. 14).

Multiple-Case Study

This research project proposed a multiple-case study approach. A multiple-case study approach presents special challenges in terms of data management. One of the challenges of qualitative case study research—as with virtually any qualitative approach—is the vast amount of data generated. For this reason, case study research has generally been limited to the examination of one or at times two or three cases when a comparative study is conducted. The single case approach offers an opportunity for in-depth examination. Eisenhardt (1989), Kennedy (1979), Yin (1994) and others have argued that significant theoretical contributions that can be made from single cases. *Middletown: A study of Modern Culture* (Lynd & Lund, 1957) is a single case primarily descriptive study that presents social life in a medium sized, Midwestern city. Owens’ (2000), “Dark Years (1961-1968): Leadership Styles and Organizational Types in the Transition from the Founder to the Successors in the Church of God in Christ,” is a descriptive study based on a single case.

However, Ferlie and McNulty (1997) argue that a multiple-case approach has the potential of offering greater rigor than a single case approach. The argument essentially is that in studying organizational processes, although a single case study can offer rich, in-depth data, a multiple case approach provides the advantage of the perspectives of multiple settings. Further, there are good examples of multiple-case studies supported the approach of this dissertation:

- Hooks (1990) developed a two-case design to examine the federal government's role in industrial planning. Two different industries were examined by a case study method, thus providing a broader perspective.
- Jacobs (1996) conducted a two-case study that included the extensive use of documents. The study examined media coverage of the Rodney King beating by tracking the event's coverage by the metropolitan newspaper and the city's primary African-American newspaper.
- (Derthick, 2004) summarizes a multiple-case study involving seven locations. All seven locations were participants in the same federal program. Derthick conducted an examination as to the inability of the U.S. government to influence local communities. The breadth of data did not permit focus and development of the individual cases. Rather the entire case study was integrated into a singular account.

There does not appear to be any uniform standard regarding how many cases should be included in a multi-case study. Ragin (1987) cautions that the "case-oriented approach works well when the number of relevant cases is relatively small," (49). Ragin (1987), Yin (1994) and others give the basic formula that the number of cases will vary according to how in-depth a treatment of each case is desired.

The challenge of data management still exists in the multiple-case approach. If more cases are considered, the researcher must decide to delve less deeply into each case. Yin, in commenting on the Derthick study, notes that in a multiple-case study, the researcher does not utilize the same intensive presentation as in a single-case study. Rather the researcher integrates findings from multiple cases to build an overall

explanation and generalized findings. The different cases, although considering the same topic and type of case environment (in this case urban areas all participating in the same federal program), reflect variation. There is value in the variation provided by the additional cases.

Yin suggests two strategies in approaching the write up of case studies. One option is to develop the narrative of each case and then develop a chapter that integrates the findings. The other approach is to develop one integrated discussion with multiple chapters. Yin writes:

Offering such an integrated cross-case discussion, instead of dwelling on the single cases, presents case study authors with a creative option: Your entire case study may be based on a similarly integrated discussion—chapter after chapter—without including the single cases as part of the text. Using this option, a common practice (also followed by Derthick) is to present the individual cases in abbreviated fashion only (e.g., as part of an appendix to the text) . . . Other multiple-case designs could have selected cases serving as “replications” of each other or as direct contrasts with each other. Whatever the choice, note that the multiple-case designs are analogous to multiple-experiment designs. In neither situation are the results from the selected cases (or experiments) simply tallied to arrive at the general findings. Rather, cross-case findings, as with cross-experiment findings in the natural sciences, depend on building explanations or arguments—with both likely to be strengthened through connections to citing relevant literature and theory (Yin, 2004, p. 86).

As there are few first hand senior leader accounts of the succession process, this study will write up the cases separately and then include a comparative chapter. This will allow greater discussion of what was learned about each church and then allow for more clear comparison as to what is similar and what is different in the various settings.

Interviews as an Essential Method in the Multiple-Case Study

The in-depth interview was the key method in the case studies. This is significant to note given that the vast majority of succession research design has been and continues

to be archival field study (Giambatista et al., 2005). Giambatista et al. (2005), in an extensive review of succession literature, acknowledge that there has been low reliance on survey and interview methods which

offer much potential for exploring the many holes and gaps in our understanding of processes from the early stages of succession (planning, searching, etc.) and exactly what it is successors do . . . the opinions and observations of executives who have lived these events would be of great help (p. 984).

Interviews

Three broad types of interview approach have been suggested: conventional (structured), conversational (semi-structured) and transformational. This study adapted Kvale's concept of a semi-structured life world interview. The semi-structured life world interview is a conversational approach to interviewing. It is semi-structured in that it is not an unguided conversation nor is it a highly structured, strictly sequenced, question by question exercise. Although there is an interview guide with themes and questions (it is not non-directive), there is an openness to allow the conversation to unfold in a less linear manner than in the conventional interview. There is the willingness to follow unplanned directions and to probe, seek clarification and follow up comments and questions.

Kvale (1996) defines the semi-structured life world interview as "an interview whose purpose is to obtain descriptions of the life world of the interviewee with respect to interpreting the meaning of the described phenomena," (pp. 6-7). Kvale continues: "Aspects of qualitative research interviews include . . . life world . . . meaning . . . qualitative . . . descriptive . . . specificity . . . deliberate naiveté . . . focused . . . ambiguity . . . change . . . sensitivity . . . interpersonal situation . . . positive experience" (pp. 30-32).

Figure 1: Aspects of life world interviews particularly relevant to this study:

- Descriptive (open nuanced descriptions of different aspects of the subjects' life worlds).
- Specific (seeking to describe specific situations and action sequences from the subject's world), and
- Focused (the interview is focused, not strictly structured but not entirely unstructured either).

An interview guide is developed. This conversational approach to the interview did not require rigid adherence to the interview guide but rather allows for the dialogue to unfold in a way that is often different than the plan. Mishler (1986) speaks of questions as they were intended to be asked and then questions as they are actually asked in the interview as often being very different. How one phrases, probes and follows up is altered by the interview and changes the interview intent and process. The researcher will be a participant in the conversation.

The interview guide was developed to unfold narrative accounts in the areas of research interest. The goal of the interview was to surface values, experiences, practices and beliefs through the interviewee's experiences in and perceptions of the succession process including any critical events or time periods. It is believed that the research resulted in thick description and significant context of succession processes.

Practical Considerations in Designing This Multiple-Case Study

Several research decisions shaped the methodological design of this study. *One decision* was as to the breadth of the study. The choices were whether to be highly focused on an individual church (and even more focused if a single individual was the

case) or to broaden the focus and be more comparative in the study orientation.³

Believing that hearing the stories of multiple individuals within each church and hearing the collective stories of several churches would have more utility in the researcher's own future transition as the directional leader in a megachurch, in his work as a consultant and in publishing an article or book on the topic, the decision was made to be more broad based.

A second decision related to how many churches should comprise the study. One research tension was the tension between deep immersion into fewer churches and the broader perspective of a larger number of churches. Another tension related to the potential avalanche of data produced by multiple case studies. As has been previously noted, it is possible to defend a variety of case study designs including the number of cases included. Clear rationale justifying the number of cases chosen, assurances as to the quality of data, and the ability to manage the volume of data generated are among the more important considerations. The decision was made to include three churches. (The research design and the actual selection process of the three churches are covered in the sections that follow). This number, although challenging in terms of data, was attainable and allowed for comparison and the surfacing of themes from a diversity of settings.

A third decision related to the number of interviewee contacts and the length of the interviews. This decision was a practical one. The individuals interviewed are senior level individuals with many demands given their roles at their churches. The visibility of

³ Bennett and George (1997) observe that "no one case study is appropriate to all possible causal assertions, modes of theory building, and research objectives. Instead, there are many types of case study research designs adapted to different purposes" (p. 1). Each strategy has its distinctive characteristics but as observed above, there appears to be considerable overlap among them.

these leaders also results in an extraordinary number of individuals seeking access to their time. There is a high level of screening that takes place regarding with whom these individuals will meet and thus it is unlikely that if access is granted, it would be extended to repeated contacts or extraordinarily lengthy interviews. Based on this line of reasoning, the decision was made to request that each interviewee set aside 75 minutes for an interview. The hope was that if there was interest in the topic of leadership succession, leaders would be open to spending 75 minutes for an interview. There was 100% response to the invitations.

A fourth decision involved the consideration of whom to interview. Rather than conducting multiple interviews of the predecessor or of the successor, the decision was made to gain different perspectives of the succession process by interviewing five individuals in each setting: the predecessor, the successor, a senior level management staff person, a board member and a long-tenured, involved congregational member. Access to the predecessor and the successor was highly desirable for a church to be included in the study. The reason is that these two individuals shared a close working knowledge of the transition process and yet viewed the succession process from differing vantage points. It was not known in advance if the ideal was achievable and in that case access to at least one of either the predecessor or successor was considered essential for a church to be a part of the study. Other approaches to the study were certainly defensible. For example, although a decision is defensible to do multiple in-depth interviews with the successor, given the absence of research on megachurch transitions, it seems more interesting to gain differing perspectives by interviewing multiple individuals in multiple settings.

Figure 2: Summary of reasons for the choice of a total of three churches:

- Diversity of different geographic and sociological settings gained with three cases versus a single case.
- Adequacy of information. (Four in-depth interviews with four different individuals, one focus group, general survey information, and archival information secured from each study site.)
- Ability to manage the volume of data of three but not more cases. (About 24 hours of recorded interviews was received plus document and media information, archival information and survey data.)
- Practical considerations (the limits of time and finances to travel to additional sites).

Overview of the Research Design

Primary Study

The succession process of three churches was examined through the case study approach. The study was multi-method utilizing general background surveys, individual interviews, focus groups, audio recording, transcription analysis and archival review. The churches selected experienced the change of the directional leader within the past five years.

General Background Survey

General survey data were collected to develop an organizational sketch and to construct an organizational timeline/history. Data sought included such items as significant dates, key events, names, attendance, finances, senior staff changes (departures and arrivals during succession process), and organizational structure. The

intent was to web-based to give the greatest opportunity for response. The survey information sought to provide essential information for understanding the antecedents and consequences to the succession process. Much information was available on the internet. Less information was received through formal means than anticipated. Most of the information received was through internet searches and through conversations with the interviewees. These data were useful as in considering the question as to what defines a successful transition.

Interviews

Interviews were conducted with selected key individuals regarding the succession process. The interviews were recorded by three means: an audio tape recorder and two digital recorders. The interviews were approximately 75 minutes in length, utilized an interview guide and were all conducted face-to-face. Two days on each site were required to conduct the interviews (not including a half-day of travel each way to each site). Several brief follow-up interviews were conducted by telephone or via email for the purposes of clarification or expansion of topics. Five interviews were conducted at each site. The ideal individuals were those most immersed in the transition process as participants. Interviews of different individuals provide the benefit of different perspectives as a number of the same in-depth questions were asked of each individual.

Figure 3: Ideal individuals for in-depth interviews

- The predecessor
- The successor
- A board member who served in a central role during the succession process
- The executive pastor/pastors or other senior level staff member serving currently and during the succession process
- A congregational member

It was considered much less than ideal if the successor had been unwilling or unavailable to participate. In this event, another church was considered. If no other churches had been available for study, then the church with the most members would be included. If neither of the predecessor or the successor was available, the church was not included in the study.

Figure 4: Alternate individuals for interview

- An additional board member
- Another senior level staff member
- A member of the succession/transition team

An interview guide was designed to discuss key themes, events and perceptions of the succession process. These additional interviews added an opportunity for the researcher to gain other perspectives on how the succession process has gone. Access to “at-large” members could have been difficult if the successor or board leadership were nervous about the opinions and feelings that may be expressed.

The interviews were conversational, reflecting Kvale's concept of a semi-structured life world interview. The interview guides included some elements of conventional/structured interviews because of the constraints of the time allotted for the interviews; the limit of one interview contact and minimal follow up contact; and specific informational questions to be raised in each interview. (See Appendix A for the draft of potential questions for the interview guides for the above named individuals).

Document Review

Documentary information and archival information are relatively unobtrusive sources of important data. Documentary information was extraordinarily important to this study as documents provided a historic perspective of the succession process and allowed for richer description than if interviews alone formed the study. Some case studies have been conducted through exclusive or exhaustive use of documents (Yin, 2004). A variety of documents were sought for collection including letters, administrative documents (such as successor profiles or time lines), video and audio recordings, newspaper, media and internet articles. These documents, although limited, were analyzed as a part of developing the case study.

Archival Review

Accessible archival data related to the succession process were collected, reviewed and analyzed as a part of developing the case study. Such data sought included official minutes, annual reports, organizational records and written processes. The archival information was secured through the executive pastor and administrative assistants. The archival information was hoped to serve both to enrich description of the

church and succession process and grant perspective to retrospective accounts given in the interviewing process as individuals are asked to reflect on issues that may be as much as five or more years in the past.

Audio Recording and Transcript Analysis

Upon agreement of each participant, each interview was recorded and the interviews in their entirety transcribed for more in-depth analysis or for illustrative purposes. Recording the interviews provided a check for the natural limits of researcher's memory, allowed for a more thorough examination of the interviews through repeated listening, and finally provided the opportunity for transcription of the interviews. The use of audio recording, transcription, and document analysis also added dimensions to succession research as succession research in general has not involved interactions with key leadership participants of succession.

Selection/Sampling

Selection/Sampling in Case Studies

In many research settings steps are taken to assure that the sample examined is statistically representative of the population from which it was taken. (A sample is a segment or subset of the population under investigation.) This is particularly the case if a researcher seeks to generalize findings to the entire population that is being studied. In order to argue for generalization, the sample must be representative of the population and thus is often selected using random selection. Statistical sampling was not a part of the design of this study and therefore generalization to a population was not the desired

outcome. The small, nonrandom sample of churches participating in this study makes statistical generalization inappropriate to this study.

Interpretive qualitative research such as this study generally does not seek statistical generalization because qualitative researchers reject the premise that individuals or cases represent the entire population.⁴ A case study is not a sample of one drawn from a defined population; a multiple case approach is not comprised of a sample of three drawn from a defined population. Therefore, one cannot make statistical generalizations to any population of megachurches experiencing succession on the basis of this study. Rather, as Bryman (2001) suggests, “findings of qualitative research are to generalize to theory rather than to populations,” (p.283.) Qualitative studies are concerned with analytic rather than statistical generalization. Bryman continues:

It is ‘the cogency of the theoretical reasoning’ (Mitchell 1983: 207), rather than statistical criteria, that is decisive in considering the generalizability of the findings of qualitative research. In other words, it is the quality of the theoretical inferences that are made out of qualitative data that is crucial to the assessment of generalization (p. 283).

Many case study theorists suggest that selection and sampling is purposive rather than statistically random (Bryman, 2001; Huberman & Miles, 179; Platt, 1992). Lincoln and Guba (1985) write:

The naturalist is likely to eschew random or representative sampling in favor of purpose or theoretical sampling because he or she thereby increases the scope or range of data exposed (random or representative sampling is likely to suppress more deviant cases) as well as the likelihood that the full array of multiple realities will be uncovered, (p. 40).

The sampling decisions were purposefully made to allow the researcher to describe the succession *processes* of megachurches. The small sample size of churches provided a

⁴ Glaser and Strauss (1967) argue that the reliance upon statistical rather than theoretical criteria make probability sampling inappropriate to qualitative research.

great deal of data relevant to the research questions raised. This study seeks to provide insight on succession processes and seeks significance in descriptive rather than statistical terms. Feagin, Orum and Sjoberg (1991) argue, “Vivid description is not the less scientific because it is descriptive. (No one has accused great scientists like Charles Darwin of being less scientific because of their naturalistic descriptive data)” (p. 20).

Selection of Cases for This Multiple-Case Study

Selection of the cases to study is an important process of the case study approach. Although the churches chosen for this qualitative study did not need to be selected through statistical sampling as is required for quantitative studies, rationale was provided for the selection process. In the case of this study, there were criteria to narrow down which churches to study.

The first criterion involves a broad screening. Three general requirements needed to be met for a church to be included in the study: a church must be a megachurch that has experienced a senior pastoral transition since January, 2000. Forty such churches were been identified. (See Appendix B)

Figure 5: General requirements for participation in the succession study

A participating church:

- Must be a protestant megachurch,
- Must have had the transition of the senior leader/directional leader as opposed to other types of transition,
- Must have had the transition since January 1, 2000

Figure 6: Methods employed to identify churches that met the general requirements

- Internet search
- Personal contacts with leaders who have transitioned or churches in which transition has taken place
- Hartford Institute of Religion data from the 2005 megachurch survey. (The Hartford Institute of Religion is a research organization focusing on information about what is happening in religious life today. The Institute is associated with Hartford Seminary in Hartford, Connecticut. The Institute has pioneered methods for the study of congregations including a national multi-faith study and a recently completed national survey of megachurches.)
- Willow Creek Association information (The Willow Creek Association is an organization that provides strategic vision, training and resources to more than 11,000 member churches from 90 denominations and 45 countries.)
- Denominational information

A second criterion was a more current temporal guideline. The next level of screening was the requirement that the transitions need to have taken place since January 1, 2003. More recent transitions provide more optimal research opportunities since longer gaps in time results in greater challenges in interviewees reflecting back on the succession process. This criterion narrowed the list to 32 churches.

A third criterion was to eliminate those churches currently in a search for a successor. This eliminated four additional churches, narrowing the group to 26 churches.

A fourth criterion was to eliminate churches in which there was an obvious involuntary departure due to death, discipline or division. Involuntary departures often introduce a different level of crisis and trauma to an organization. This criterion eliminated four additional churches, leaving a list of 22 churches.

Several other factors then were considered in developing an invitational list of potential research subjects: cost factors, accessibility factors, the level of interest/openness to the study by the senior pastor or executive pastor, and personal interest factors.

(See Figure 7 below.)

Figure 7: Final factors in screening churches for the study

1. Cost factor: Several “trips” were identified in which one church could be visited by an airline flight and then a second visited within driving distance of the first church. This minimized cost.
2. Accessibility factor: Accessibility was a significant factor. Senior pastors of megachurches have an enormous number of demands. A personal contact or some other common factor (such as membership in the Willow Creek Association) provided a better opportunity for a positive response.
3. Interest factor: The level of interest/openness the church leadership has towards participating in the study also was a factor.
4. Personal interest factor: The personal interest factors related to churches in which the researcher was interested in terms of what they offer and represent in their communities.
5. Finally, there was the factor of the opportunity for learning. Stake (1998) suggests the following:

The researcher examines various interests in the phenomenon, selecting a case of some typicality, but leaning toward those cases that seem to offer opportunity to learn. My choice would be take that case from which we feel we can learn the most. That may mean taking the one that we can spend the most time with. Potential for learning is a different and sometimes superior criterion to representativeness (p. 101).

A final invitation list was developed with seven churches invited with three of these agreeing to participate. (See Appendix C) The list included ten alternate churches.

Data Analysis

Data analysis was linked to the overall purpose of the study. This study is a qualitative descriptive study seeking to increase understanding of leadership succession in megachurches through the experiences of those most closely involved in the process. As mentioned earlier in this proposal, the desired outcome is rich description of three megachurch succession processes and a comparative examination of the similarities and differences of the processes. This allows for examination of the unique experiences and expressions of the interviewees and allows for the opportunity to bring together similar ideas, themes, patterns and perceptions. Rubin and Rubin (1995) state that the purpose of data analysis is to “organize the interviews to present a narrative that explains what happened or provide a description of the norms and values that underlie cultural behavior,” (p. 229).

Data analysis was not a “last-stage” of study matter but rather was ongoing throughout the course of the study. This reflects the qualitative orientation that values researchers constantly reflecting on responses, impressions, recollections and records as data is being collected. Rubin and Rubin, (1995) and Stake, (1998) suggest that data analysis begins while the interviewing is ongoing. Kvale (1996) argues that “interpreting as you go” is not only important to the data-gathering process but also in pushing forward part of the analysis into the interview situation itself (p. 178).

Analysis Options

Description was a primary goal of this study but involved comparative analysis as well. The data needed to tell the story (Feagan, Orum & Sjoberg, 1991) but involved

comparative analysis as well. Yin (1994) suggests four dominant modes of case study analysis: pattern-matching, explanation-building, time-series analysis and program logic models. Kvale (1996) suggests five main approaches to qualitative analysis: meaning condensation, meaning categorization, narrative structuring (focusing on the stories), meaning interpretation and generating meaning through ad hoc methods (an eclectic approach). Boyatzis (1988) states that thematic analysis involves three distinct stages: deciding on sampling and design issues, developing themes and code, and validating and using the code. Rubin and Rubin (1995) “read and reread the interviews to note core ideas and concepts, recognize emotive stories and find themes,” then, “code the material” to group similar ideas together and figure out how the themes relate to each other,” (p. 229).

Analysis in This Study

Analysis in this study is reflective of a qualitative multiple case study approach. It paid attention to concepts, stories and themes through extensive listening and reading interviews, and reading, listening to or watching documentary and archival data. The researcher made the decision to transcribe the interviews in their entirety. This process, though tedious, provided much greater access to the interviews in review. Extensive notes were taken through these processes. The data were then coded. Rubin and Rubin (1995) write, “Coding is the process of grouping interviewees’ responses into categories that bring together the similar ideas, concepts or themes you have discovered, or steps or stages in a process,” (p. 238). The study followed the process suggested by Rubin and Rubin. Coding was a developmental process in which first readings led to initial coding

categories; re-readings resulted in sorting the data into categories which led to connections between different sets of data.

The analysis process was both inductive and deductive. Inductive pattern recognition was accompanied with deduction. Pettigrew (1997) writes, “Few . . . scholars enter the field with an empty head waiting to be filled with evidence. Scholars are not just scientists, they remain obstinately human beings and as such are carriers of assumptions, values and frames of reference which guide what they are capable of seeing and not seeing.” (p. 339).

A final stage of analysis was the organization of data in a comparative chapter to formulate the overarching themes of the succession process (Rubin and Rubin, 1995) as well as to share unique perspectives and experiences of the participants. These were linked together to provide a description of the succession process.

Issues of Trustworthiness

This section discusses what criteria are appropriate for judging the quality or the trustworthiness of this study as well as what threats exist to trustworthiness. Internal validity, external validity, reliability and objectivity are often advanced in leadership studies as the benchmarks of rigor. Guba and Lincoln (1998) offer the following descriptions of the criteria: “internal validity (isomorphism of finds with reality), external validity (generalizability), reliability (in the sense of stability), and objectivity (distanced and neutral observer). These criteria emerge from a positivist ontological position that strives for discovery of the single, objective reality that is observable and quantifiable and findings that can be replicated because that reality does not change. Feagan, Orum and Sjoberg (1991) note that, “Quantitative procedures seek to unearth the uniformities of

social life and to render such uniformities into precise, numeric forms that lend themselves to formulations, refinement and testing of hypotheses” (p. 17).

The criteria for this project emerge from different epistemological and ontological assumptions about the world. Those assumptions have been reflected previously in this document, namely, that the social world is not purely objective and exhaustively verifiable. Our understanding of the world will always be derivative via the paradigms that guide us and is interpretive in its very nature. Perceptions of the social world are interpretive and constructed by the participants. There is not a single grand theory. Organizations do not move from one frozen moment in time to the next . . . they are dynamic, organic, in process and complex. Feagan, Orum and Sjoberg (1991) write, ‘Qualitative procedures, which are the type most used in case study research, seek to understand social action at a greater richness and depth and, hence, seek to record such action through a more complex, nuanced, and subtle set of interpretive categories,’ (p. 17).

Criteria for Assuring the Trustworthiness of a Qualitative Study

Guba and Lincoln (1998) offer four alternative constructs for assuring the trustworthiness of a study conducted with the assumptions of the qualitative paradigm. They suggest the criteria of credibility, transferability, dependability and confirmability. The first is *credibility* in which the goal is accurate identification and description of the phenomenon. Credibility mirrors internal validity and raises the questions: “Are the findings feasible?” “Would a reasonable person consider the findings credible?”

Transferability parallels the quantitative criteria of external validity. Transferability relates to the applicability of findings and methods to others in similar

contexts with similar questions and practices. Transferability speaks to the defensibility or explicability of a theoretical framework and research design to others. In this study transferability is enhanced by triangulation. A multi-method approach is proposed with several data-gathering methods (in-depth individual interviews, document review, archival analysis and a basic information gathering survey) and data sources (three different churches with four individuals from each church) (Fontana & Frey, 1998; Guba & Lincoln, 1998; Marshall & Rossman, 1996). “Designing a study in which multiple cases, multiple informants, or more than one data-gathering method are used can greatly strengthen the study’s usefulness for other settings,” (Marshall & Rossman, 1996, p. 194).

Dependability has to do with the careful tracking of procedures including the planning of the research, the method of selecting participants, how data were collected and maintained, the transcription process, how coding and interpretation of data took place and the write-up of the findings. Bryman (2001) suggests that researchers adopt an “auditing approach” that involves keeping complete records of all phases of the research process. This study includes tracking of how churches were identified and then selected, the data collection methods and the early data analysis decisions. Some qualitative researchers suggest that dependability parallels the quantitative idea of reliability (Guba & Lincoln, 1998) although Marshall and Rossman (1996) rightly observe that dependability represents a set of assumptions different from those shaping the idea of reliability. Dependability opens up the research process and provides for the accountability of the auditing of other researchers. This study will be transparent as interview guides, audio recordings and archival information are all accessible and reviewable.

Confirmability is concerned with the questions, “Could others use this same process?” and, “Did the researcher act in good faith?” Researcher bias is always a significant concern in qualitative studies.

Specific Challenges to This Study and Safeguards

1. One challenge was my own personal bias since I am a leader, immersed in leadership literature and personally concerned about succession in my own setting. These factors were both an advantage and disadvantage. My strong background in these areas and credibility due to my own position granted me access to individuals that are in general very inaccessible to researchers. My leadership experiences and knowledge helped guide the conversational interviews. I took precautions regarding my own bias by keeping my findings rooted in the data, by including as much data as is feasible for others to examine for their own judgment and by maintaining transparency of process in all parts of the study.

There are practical and personal interests in this project. Until January, 2008, I served as the Senior Pastor of Calvary Church, serving in this role for more than seventeen years (and have served on the staff for more than 22 years total). I served as Pastor of Students and Families for almost four years prior to succeeding the prior Senior Pastor. The transition that I lived through was chaotic and dominated by conflict and instability. Some of the conflict was fueled by changes that I brought about related to new vision and values for ministry; some of it was rooted in unresolved conflicts with the leadership regarding past issues; and some of it was generational (all previous senior leaders were in their 60s, I was 33 at the time of my transition). Calvary Church has

grown to become one of the few megachurches in the mid-Atlantic/Northeast region of the country with more than 3,000 people attending weekend services.

There is a saying among researchers of Protestant churches, that few churches maintain health and strength beyond one generation and one dynamic leader. Although I cannot nor do I desire to control the future of Calvary, my hope is that the health and vitality that characterized my tenure will continue far into the future. My greatest responsibilities included the development of younger leaders and the preparation of our board of directors, staff and congregation for a succession process. However, preparation is no guarantee of the success of the next leader.

Beyond the practical concerns is my vision to serve beyond the walls of Calvary Church. The average age of the senior leader in megachurches nationally is 52. This means that there will be a tremendous number of senior leader transitions in the next two decades. My relationship with other megachurch leaders provides the opportunity to serve the larger community of churches nationally by sharing the learning that this study offers.

2. Another challenge was the risk of superficial or less than forthright responses on the part of interviewees because of impression management issues or concerns regarding confidentiality issues. I communicated in advance of the interviews and in the actual interviews that there are not “right and wrong” answers, this study is not making judgment on a person’s actions, attitudes or perspectives and that information shared will be kept absolutely confidential. Further it was stated that for the study to be of greatest benefit and most accurately reflective of the succession process, forthright comments about one’s experiences were crucial. One of the limitations of this interviewing

approach relates to trust issues. Will a person open up and share accounts that may be deeply personal, sensitive or risky? Will a leader be truly honest regarding struggles with other individuals or out of impression-management or self-protection give a more positive picture than what actually exists?

3. A third challenge was inconsistency in terms of the actual procedures used given the vast amount of information to be gathered. I kept a research journal that detailed each step of the study and further will kept careful records, organizing and storing data in an easily retrievable form. Further, I had another individual transcribe the interviews, and then carefully checked that the transcriptions were accurate by listening to the interviews in their entirety.

4. Another threat was that of accessibility. The failure of a number of individuals to participate could alter the findings of the study. I safeguarded against this by being as explicit as possible in the recruitment process regarding who needed to be involved. Once a commitment was given for a church to be involved I clarified the importance of those individuals participating in the study. I also scheduled well in advance of a visit and sought to complete a visit when the maximum number of participants was available. Finally, in rare cases I was prepared to conduct the interview by phone if that appeared to be the only means of gaining access to a person.

5. Data collection issues were a concern. Three different audio recording devices were utilized in case of the failure or poor recording quality of one of the units: an analogue recorder and two digital recorders. The digital recorders were more desirable because the recordings were uploaded to a computer, burned to a DVD for archival storage. Further, digital recording allowed for greater ease of transcription.

6. Confidentiality issues can also presented obstacles to the research process. As these individuals were not familiar with me, it was possible that individuals be reluctant to be recorded. The appropriate IRB forms were utilized and explanation given regarding the limits of accessibility to the recording other than by the researcher, his transcription assistant and the committee. The forms were signed as a matter of good faith on the part of the researcher. The interviewee had the option of not granting permission for the interview to be recorded.

7. Accuracy issues were a concern. Hand-written interview notes were checked against the interview recordings and the transcription of the interviews for accuracy. Transcribed notes were checked against the recordings for accuracy. In the event that the interviewee did not agree to recording, the researcher was prepared to take as extensive notes as possible during the interview; review those notes immediately following the interview; and reserve the option of contacting the interviewee to check the accuracy of notes taken.

8. Another concern was the failure to conduct the interview in a way that allowed for open discussion and the follow-up to questions and responses. I had extensive experience in interviewing methodology, not simply through projects completed during the course of my Ph.D. studies at Temple (for example, the extensive interview based project on Les Clemens as an admired leader) but also professionally. As the co-founder of The Center for Ministry Advancement, I worked with dozens of non-profits on key leadership processes and conducted confidential interviews in these settings. I conducted interviews of Wall Street executives as a part of an admired leader study sponsored by

CRA. Finally, I had more than 30 years of experience in church ministries that make me aware of many cultural nuances of Protestant church life.

Limitations of This Study

One limitation of the study is that of breadth. Although this was an ambitious undertaking and generated rich descriptions and provides windows for viewing leader succession processes, the study only involved three churches. This was both a defensible research strategy as well as a practical research design decision in order to make the study goals attainable. Future study could include a guided survey developed from the findings of this study that would allow the testing of ideas and comparing of experiences from a larger number of churches.

Another limitation is that this study was not truly longitudinal and relies heavily on retrospective accounts. Future study would be enriched by a true processual approach that includes observation and interviews as the succession process is unfolding. One of the leaders with whom I spoke is still deeply embroiled in the chaos of the succession process. He was reluctant to participate because he believes he needs to “process more thoroughly” what is going on. I mentioned to him that his current experiences are of great value. The limitation of this study is the inability to track with leaders as this organic, amorphous process of succession unfolds.

This study would benefit as well from a broad based quantitative survey of churches that have experienced a transition in the past ten years. Attendance, finances and staff turnover would be among the interesting facts to know and then correlation of those facts to some of the existing succession literature regarding the presence or absence of a succession plan, an insider or outsider as successor and other succession templates.

Researcher's Personal Experiences

Little did I realize when I launched into this study the dramatic changes in my own personal life that would occur. Following completion of my coursework I experienced severe health difficulties that slowed my proposal and dissertation completion. My Ph.D was completed in the context of a more than full-time vocational role. As senior pastor of a growing, megachurch, I experienced the fatigue that occurs from leading in a complex role over a twenty-year period at Calvary Church. I began to reflect on “life after Calvary,” and over a three year period began more intentionally positioning the church for the next generation of leaders. Another health setback coupled with the conversations with the senior leaders of this study accelerated my own transition. Over the course of the last year of my dissertation work I also completed my transition out of my role at Calvary, after serving for twenty-three years. I did not enter the interview process anticipating the timing of my transition. I believed it might be two years off. Although I did not indicate the seriousness of my own thinking about transition in the course of the interviews, the conversations and findings from these conversations gave language to my own experiences in transition. I did not anticipate the powerful feelings of loss—not the loss of position, but the loss of relationships as I completed my responsibilities and then “disappeared” to allow the new leadership to take root without my shadow. As a result of my own personal journey, the data analysis and writing of my findings were intensely personal processes.

I am fortunate to be pursuing a long-term dream of academia, leadership mentoring and photography. At the writing of this document my wife and I are relocating from Philadelphia, Pennsylvania to Auckland, New Zealand.

CHAPTER 4

NARRATIVES OF TRANSITION: COMMUNITY CHURCH

This chapter and the two that follow introduce the narratives of fifteen leaders from three megachurches. These narratives come from in-depth, face to face, recorded interviews. Each of the interviews was transcribed in its entirety and examined by listening to the recordings, reading the transcriptions and taking extensive notes. The individuals identified for interview were among those most immersed as participants in the recent transition process within their respective churches. In each church the accounts of the predecessor, the successor, key staff members, and a board member are shared. Each individual shares his responses to questions often using religious language and expressions that are meaningful to those immersed in protestant megachurch culture.

This study is a qualitative descriptive study seeking to increase understanding of the process of leadership succession in megachurches. As such it seeks to surface the real-life experiences and conceptual frameworks of those who have “lived” through a process of leadership succession. As mentioned in the methods section, succession is not an event (the arrival of the successor) but rather a highly personal process that unfolds over a long period of time (generally over several years). This study is interested in the point of view and the lives of the participants as they lived through these processes. The interviews were conversational reflecting Kvale’s (1996) concept of a semi-structured life world interview. As a result the narratives, although reflecting the broad organization reflective of the interview guide, do not have the neat categories of organization one might expect in a quantitative study. Rather the attempt has been made to allow the conversations of the interviewees to unfold as they spoke of their experiences.

The narratives that follow are from real people in real locations but the names and incidental details have been changed to maintain confidentiality.

Community Church Background

Community Church was founded in the 1970s around a cell group and team teaching model of ministry. A cell-based church model focuses on connecting people into “cells” of 8-12 people. Within the context of cells, individuals build intensive relationships with one another for personal growth and support. The cell model countered the more traditional model of large group, lecture based learning at the time. A team teaching model simply is a model with two or more primary communicators. This contrasts the traditional church model of one primary “preacher.” Community Church functioned with three primary leaders, each of whom thirty years later is still active today in a ministry associated with the church. This is remarkable given that the average pastoral tenure in protestant churches is less than five years.

In the early years of the ministry, the topic of succession was never discussed and was never even seriously considered as an important matter for conversation. As a successful young organization with young leaders, there was a sense of invulnerability. Community Church had three leaders in their twenties and the unusual strength of three competent speakers in the pulpit. The church felt secure because of the close personal relationships among these three leaders and in the strength of leading and speaking gifts that were resident. This sense of security continued for about twenty years and again no one in leadership vocalized any thoughts about succession or succession planning.

First “Corporate” (Church) Thoughts of Succession—Broad Leadership Succession

Community Church is governed by a board of elders. Leadership transition and the subsequent succession were not active topics in organizational life for more than twenty years. Rather, due to good working relationships and skills well matched to the needs of the ministry, the church experienced stability and longevity on the board. Board terms were not defined. There was no rotation of leaders on and off the board. However, about twenty years into the church’s history, the leadership team realized that all of them were aging. The youthful representation believed essential for continued long-term growth was no longer resident within the leadership team. In the words of one of the leadership team members, “Stability is a wonderful thing but if you don’t watch it, it can blindside you . . . because the very stability you have, you—you—become pillars that harden. And you don’t even know it.”

This recognition led to three decisions. The first was the creation of two divisions of the board. One division became the decision-making/governing body tasked with the operations side of the church. The second division was a shepherding/relational body that performed congregational care functions. This decision allowed the church with its growth and increased complexity to more effectively function.

The second decision was adoption of a mandatory retirement provision that required retirement from operational board status at age sixty-five. A leader could continue in the role of elder emeritus and continue to serve on the shepherding body. Emeritus status allowed for continued connection with the ministry on the leader’s part and access to the wisdom and experience of the “retired” leader on the church’s part.

(The retirement provision could be waived if an individual's gifts and experiences were particularly needed at a particular time of ministry.)

The third decision was the establishment of the protégé program, a leadership development program seeking to create a future pool of potential leaders. The protégé program essentially was a succession planning mechanism for board leadership. Young leaders were identified, interviewed, and then invited to sit in an unofficial capacity on the elder board for one year. This allowed the young leaders to gain exposure to the inner workings of the church and allowed the existing elder board to become familiar with the young leaders. Each young leader was matched with one of the existing board members in a mentoring type of relationship. This proved to be an important move for the church because as the church entered the third decade of its ministry, leaders began to leave the board for various reasons. The protégé program ended up serving as the pool from which the new leaders were selected. In a relatively short period of time (three years), there was a successful infusion of younger leaders, most of whom were in their thirties.

According to those interviewed, the young leaders have performed well and after six years all those appointed continue to serve (without any departures). This transition of youth into the corporate governance increased the awareness of the three senior leaders and the church body of the need to look to the future. At this time, all three of the teaching pastors were just turning fifty or in their early fifties.

The church hired a younger teaching pastor who appeared to fit the criterion of both youth and speaking skill, but in time this individual and another staff member moved to another part of the United States to begin a new church. His departure brought an increased awareness of the aging of the teaching team and created pressure from the

leadership and church body as a whole to identify another younger communicator. The senior pastor and the executive team were not thinking about personally leaving but they were beginning to think corporately about the importance of transitions and insuring the next generations of leadership.

Reagan—the Predecessor

Reagan was one of the three formational team members of Community Church and a long-term member of the executive team. Although Community Church speaks of having a team ministry through the years, Reagan was recognized by the staff, leadership and congregation as the senior pastor. Over a twenty-five year ministry, Reagan experienced vocational success at the church as well as success nationally as a speaker and author.

First Thoughts of Transition

Reagan's first thoughts of transition occurred in the midst of vocational success. He had just turned age fifty at the time. He describes his first thoughts of transition as a deeply personal, spiritual experience.

That was more of a spiritual journey honestly. . . I was writing another book . . . we were thinking about a conference . . . in the midst of all of that . . . all I can . . . all I can say, it was a mystical, spiritual moment that occasionally invades your life, that . . . either is . . . hallucination or it's really God. And I've had those and you know over my lifetime I've learned to hear the voice of God but I always hold it loosely until I'm sure . . . there aren't tons of those dramatic moments, but, I'm glad they're there because they've been life changing.

But I had one of those moments that was kind of a real surprise to me. I think maybe I'd been stewing on stuff a lot more and actually was up in _____ for a weekend. My son was playing a sport up there at the time. . . . I got up early that morning and I was just spending some time in prayer and just kind of sitting there, just kind of a quiet reflection, and it was just one of those moments that . . . it was as if God suddenly appeared

and spoke and basically what I perceived I was hearing—which was a total shock, cause I don't think I was thinking this—"You're not going to be at Community Church much longer." And it was like a lot of little things flashed through my mind at once and were so powerful to me that I sat down and wrote down what I thought I was perceiving. And there were like six things and it [snaps fingers] but happened in a moment but it was just—I'm not going to be here . . . there's some other adventure, I need to transition out . . . and uh . . . I—I need to just trust him for that.

The experience was startling because in the first twenty years of his tenure (in his memory) the topic of transition did not come up nor was it an option that Reagan had ever actively considered. On the drive home from the weekend, Reagan shared the experience with his wife. Although he qualified his experience and said, "I'm holding this loosely because this may not be true," he felt strongly enough about the impression to state that he didn't think that he was going to be at the church much longer. Reagan also called one of the elders who was a close friend, shared the experience, and asked this elder to hold him accountable for this sense of closure. This elder was stunned by the disclosure because there was no sense of the need nor an expressed desire for a transition either on Reagan's part or on the church's part. Reagan, however, wanted to tell someone to mark the moment so that the leadership collectively could look back and see if God was in this. If it didn't work Reagan joked, "I just want you to know that I was hallucinating." He asked that the leader keep the disclosure confidential.

The First Conversations Regarding Transition with the Leadership

"Nothing happened" for over a year. During this year, the church experienced virtually unprecedented success. Then one day Reagan received an unexpected phone call from a friend inviting him to become the senior executive of a national Christian organization. The organization had recently experienced a difficult time of turmoil and

needed a strong, resourceful leader. Reagan was their person of choice. This was almost exactly a year after this “epiphany” that Reagan was not going to be at the church much longer. Upon the invitation Reagan met with the entire elder board and told the story of his experience one year before. His elder friend confirmed the experience. Reagan told the board that he believed that he should seriously investigate the possibility. The board in response indicated that they could see him functioning in that kind of a role.

This opportunity and the openness with which Reagan conversed with his board set into motion for the first time a series of discussions on the possibility of transition by the senior leader. (Reagan eventually assisted his friend’s organization, joined the governing board, but declined the opportunity to serve as president.) This occasion was five years before Reagan’s eventual transition. The invitation resulted in recognition on Reagan’s part that he was ready to actively pursue a transition to a different kind of opportunity. He was surprised to discover that his spouse also felt that a change was needed. Again, this was a time in his life when many opportunities were opening up in terms of speaking, writing and leading. His interests and passions were increasingly outside of the context of the local church. He reported that one evening his wife said, “One thing I know, for sure, you can’t keep doing it all; either [focus on] the church or you need to take these signals and think about something else.”

Three Important Questions for the Transition of the Senior Leader

Conversations with the elder board led to the identification of three significant issues for transition stated in the form of questions:

1. What will you do?
2. Who will replace you?

3. How will you make it financially?

The first question related to having something challenging and meaningful in which to engage. Reagan had a growing writing and speaking career. The elder board saw these areas of his vocation growing. The board also had the perspective to affirm to Reagan that the next season of his life would be larger in scope and focus than the local church.

The second question, perhaps the most obvious question in transition is, “Who will replace you?”

The third question has to do with the practical considerations of finances. Community Church’s board took the initiative to figure out how to make a transition financially feasible. This was a crucial decision in the overall success of Reagan’s transition.

Community Church’s board took the initiative and addressed this concern with Reagan. The board implemented a plan to meet his financial needs without placing a drain on the church financially. This allowed the church to continue to access his leadership currency, skills and good will as well as move the church towards a succession process that identified a leader matched for the current and anticipated future needs of the ministry. Much of Reagan’s financial package was raised through independent contributions by people he had ministered to over the years. His twenty-five years of outstanding service and his current financial standing factored into the decision.

This board decision to provide financial support for a ten-year period allowed him to pursue his areas of skill and interest without having to connect to another

organization for the sake of making a living. He has been able to invest himself into the ministries that were outgrowths of his leadership while at Community.

Reagan's Migration Towards Transition

After working through the financial arrangements, Community Church's leadership tasked Reagan with identifying his successor. They retained final authority on the decision but asked him to stay until that person was in place. To set the context, this was a time of major changes, significant growth and increasing influence in the region and nationally. The church was gearing up for continued expansion and Reagan began to pursue some of his interests more substantially. The church was not in a situation in which either the leader or the church was coasting and/or sensing the need for a change. Reagan's own sense when questioned about Community Church was that things had never been better. It was arguably the greatest time in their history and yet Reagan began to have this inner sense that he could not sustain nor did he want to sustain everything in which he was involved.

Reagan reflected on his own life after more than twenty years in the leadership role.

Maybe in the deeper psyche, just the . . . ongoingness of everything and the size of everything . . . maybe I was feeling unconsciously that, "you can't keep doing all of this." There's just a natural break, I don't know. I don't know how to describe it . . . when I talk to some pastors about their succession, they all have a low grade fever. They know that something's not quite right. And that—and that—to continue to do this and gear up for another—'cause they're usually change agents. And so gearing up in their fifties for another big change . . . I think does obligate them in their minds and they're wondering, "Is that in me? Because after I manage all that change, by the time all that gets finished, I'll be in my sixties."

And so maybe there's just a natural thing of, where's the end because what they know is on the other side of that, there's another series of changes

because the real good churches are constantly in some kind of upgrade. That doesn't mean size but quality [of church]. But I—I don't know . . . you know below the surface probably was stewing . . . I do have to say we'd just come out of a lot of that transition and we're bearing the success of it . . . so actually it was a kind of time where, if you wanted to coast you could. It's just I get new ideas . . . for a whole year, it was like, "nah." I even started thinking big and that it's [transition] probably not going to happen and I was turning my attention to things. I think the _____ thing [invitation to the executive position] kind of shook me up.

Community Church's Board's Migration Towards Transition

Reagan's board indicated that they could see him taking a role like the one to which he was being recruited. Reagan took their awareness of this and openness to think in these terms as an indication of a constructive environment for him to actively consider transition. Reagan expressed the opinion that for a transition to be successful and for the church to feel secure, the leadership, the ones who will be there as the senior leader leaves, need to be supportive of the timing and sequence of the transition.

Seeking a Successor

There was not a sense that Reagan was finished in his role but rather the recognition that multi-generational leadership was important to the long-term health of the church. Community Church chose to bring a younger leader alongside a long tenured leader. Reagan's board was committed to finding another directional leader while he was in place. This would allow them access to his recruitment and staff identification skills. He was commissioned to look for a new directional leader who would need to demonstrate his capabilities over time before the "mantel is turned to him." If the individual identified did not turn out to be the person of choice, Reagan was to continue

to look for this individual. This resulted in Reagan's transition taking place over a five-year period. He thought it could be as long as ten years.

Reagan developed a profile. The profile indicated that the next leader needed to be relational, have a high work volume capacity, be an exceptional communicator, and possess strong leadership skills. Following the successor profile development, Reagan began to work his network around the country. James, the eventual successor, was identified within the first few months. Reagan's recruitment approach was relational involving conversations with James over a one-year period. Reagan informed James that if he were to come, the church was requesting a five-year commitment. During this time the determination would be made as to whether or not he would be Reagan's successor. If the decision was negative, he could remain as a teaching pastor. However, if the decision was positive, a transition would take place as soon as was feasible. Reagan told James, "If you got the other capacity. I'll give it to you as soon as I know that."

James joined the staff and clearly began to build credibility with the congregation and the staff. Reagan gave him increasing responsibilities. In the third year, Reagan told James that he was the person. The elders agreed with the assessment over a period of one year. At the end of the one year period, Reagan announced the decision to the church body, co-led with James for a number of months, and then stepped down completely from his role. (He did remain on the elder board for about one year following his transition out of the senior leader role.)

The Personal Side of Transition

Reagan spoke at length regarding the personal side of transition particularly in terms of self identity, grief and losses. He identified a personal lack of awareness and

gross miscalculation as to the profound personal impact of the transition out of this challenging, high visibility role.

The Counsel of a Friend

As he moved toward transition, a friend shared with Reagan his own experience of transition out of a senior role. This friend made a transition out of the management of a major U.S. financial institution, remained in the organization but to do so gave up much of his leadership authority and responsibilities. He warned Reagan that the change was much more emotional than he could have imagined and the grieving, the sense of loss continued for much longer than he realized.

Reagan initially dismissed the counsel not realizing that much of his sense of self came from what he did and from the recognition of who he was.

And this is something I tell to other pastors who are thinking about succession who are in their 50s. You cannot, unless you are just burned out, you cannot go through succession with nothing up in front of you because this is huge for your identity.

Honestly, I, now looking back, [it was] much bigger than I realized, even then. I am a risk taker and so I kinda of discover things after the fact. I intuitively know where to go but after the fact, I went, “WHOA, I didn’t have any idea it meant this and this and this.”

The Difficult Dimensions of Transition: Dismissal, Delayed Loss, Loss of Identity

The first six months of Reagan’s transition were exhilarating. He wasn’t managing nearly as much. He still served on the elder board. He had five projects (books and films) in process. He kept waiting to experience what his friend experienced. When his friend asked how he was doing, Reagan would respond that he was doing really well.

But what I was not prepared for . . . it started slow, with ups and downs, and then probably last fall became more of a truly deep loss and angst—was the emotional dismissal from the church.

That I didn't know was going to happen.

I told everybody . . . now looking back. . . that I think I had an ideal that those guys would take the church . . . but because of me so graciously giving to these guys and setting them up to win and giving them something I worked for twenty-five years that they would . . .

I don't know if this is just idealism . . . but that they would have a certain respect . . . a certain desire . . . I wasn't looking for people to be asking me to make decisions . . . but they would be looking to me from time to time to give them some help.

They would call me in . . . to speak . . .

They would have some things they would want me to continue to do . . . I felt that would just naturally happen between James and me because in this transition there was a pretty good friendship . . .

It shocked me when, what I thought was a friendship—and I wouldn't say it's not friendly—but once James got into the saddle, my presence was a threat . . . or maybe not even a threat . . . just irritating—James has never said it was irritating. I want you to know that.

It was more a sense you started feeling—and I told my wife one time—it just felt like I was being dismissed but nobody was saying it.

And I didn't know how to describe that . . .

I think I've done good. I think if you went over and asked them, they would say I did good staying out of the way but I felt like somebody would say, "Would you help us do this?" And I could always be a little value added . . .

But they didn't. . . and not only that, but the original thing that I'd be preaching occasionally . . . it shocked me that I didn't get any invitation to speak and yet I thought that was a part of the deal.

It was like when I would step in there it would create too much feedback . . . and that was just irritating. It wasn't that James wasn't doing a great job.

Reagan's assessment was that the board and the staff were accustomed to him speaking as the point leader. His words were treated with a different weight than when others in the room would speak. Now that the transition had taken place there was a period of readjustment. The transition represented a change in status and a change in response to Reagan. His perspectives were more freely challenged or even dismissed. He sensed that his opinion was irritating James at times. There was a bit of a shadow effect. In time Reagan took James to lunch.

REAGAN: "James, tell me how you are feeling about this. Would you want me on the elder board?" And when he couldn't give me a strong yes, I think that's the first time I went into the tank because I felt like . . . I spent all this time . . . this is the personal side, I spent all this time giving to you my whole life, and you do it in such a nice way, I can't get mad at you, but what I'm feeling is, "Get lost." And I never thought it would be that.

And yet, I'd step back, this is maybe my objective side, I'd step back and go, "Would I want me around?" And I couldn't give myself a strong answer either.

INTERVIEWER: You know it's interesting—[what] you're sharing—that because to a person, the leaders I've interviewed at some point have had that experience you've just talked about and it's like you say . . . there comes a point when the young guys are ready to move on. And they don't [want input] . . . it's an awkward functioning because the predecessor's voice has been so powerful. And when that moment comes, there is a deep sting.

REAGAN: Yeah. And it—and you know what, and because I think—this is for me—I think because the first year or more I was over here real busy and that kind of thing didn't happen . . . I think the body, my family and everybody felt like I just moved through it. I almost wish it had happened early because when I started expressing this . . . nobody could understand it. I'm just saying because I didn't want to sound like sour grapes or trying to step back in but I wanted to process because I felt . . . I call it "THE GREAT DISMISSAL."

And suddenly I was a ghost.

And it was almost like, with the new staff that were coming in over there . . . it's like my daughter said one day, she was the communications director, "They call you Johnson, like you are some old fart."

And then I got all emotional about it and every time I'd feel that dismissal it was like both anger and depression that was so deep that you just don't know what to do with it.

I wanted to talk. And I think my wife got tired of me just trying to talk it out. I really wanted somebody just to talk it out but I couldn't.

Reagan spoke of the importance of a close friend or friends during this time.

Reagan and this friend just began to talk about what he was feeling. This friend had been through a major life transition in another setting but had enough similarity and enough trust in the relationship that open conversations could take place. For Reagan a safe place just to talk was one of the most helpful practices to identify, articulate and begin to deal with all that he was feeling. "I just needed more of a sympathetic ear because I think I was going through delayed loss. . . . I got blindsided with that delayed part and I think it made me even more isolated because I didn't have that initial flux of people saying, 'You okay?' . . . It hurt even more cause people thought I was okay." He was emphatic about the need for places of conversation to process the bewildering new experiences of change and loss. Voices are needed that offer affirmation during this destabilizing time when the normal sources of affirmation and markers for success are uprooted. His friend, "didn't have to solve anything. He just sat there and went, 'That makes perfect sense.' And it was just good to have somebody say that. . . . I just needed to flush it out and say, 'Ahha. That's grief that I am feeling.'"

Reagan attributed part of the delayed sense in his case with all the projects that he stepped into immediately following his transition. But another change, the loss of a senior

leadership role at the church and the manner in which that unfolded, created an additional emotional reaction for Reagan.

I never thought I would step off the elder board. And then even when I stepped off the elder board—I mean I'd been with these guys for so many years—I read them a little statement because I felt like something needed to go in the minutes. And some of these guys I'd been with twenty something years . . . thanked me. But I wanted them to follow me out and they didn't.

And nobody, and nobody even called because again, I'd been through almost a year of that transition where they thought I was fine. And it was kind of like, "Okay."

I don't know what I was expecting cause I've never had a formal goodbye for the church—we just didn't do it that way—so I think I had to work all of that through.

That's why I always tell these guys, the good news is I had something to go to. I was still working on the projects and these new things were starting but, gosh, I'm glad I had that because I think if I hadn't had that . . . I think you could be in a place where you really started feeling depressed.

And I never got there, I just felt this hollowness of loss of identity or loss that I was never going to have a place here anymore. And I didn't realize how significant that was feelings-wise.

Reagan reported that his feelings following his resignation from the elder board were so powerful that he just "tanked." "I knew I was in grief. And I knew part of it cause I felt angry too. And that anger, that sense of 'Why am I so disturbed?' I wanted to lash out." It took months of work on these feelings of loss. He said, "I think I was a bore for some people for months, especially my wife." Others were trying to understand if he wanted to go back into his role. He didn't know what he wanted. It was such a significant loss and yet he appeared to be functioning. Those around him saw him working on all his projects and so assumed, based on the surface appearance, that he was just fine. "But for me, it was a dark hollow." In terms of the timing of these experiences, Reagan served in

the “copilot position” with James for about one year. From Reagan’s perspective that part of the transition went very well. The first year of transition out of the role went “okay” as he experienced release from the pressures of operations and as he launched into projects.

It was close to the end of that first year of transition that Reagan began to experience the sense of a loss of influence and the changing of James’ attitude toward him. Reagan went to James and said: ‘I need to do something’ . . . I mean, I’m sitting on the elder board and I feel like I’m irritating. And that’s where he didn’t say much and I said, ‘Do you want me here?’ He couldn’t say a strong yes and at that point I just asked what I could do to help.” James asked Reagan to do interventions with two areas of ministry. Reagan did this. “I was just leading this as a gift and helped him hire some key people and let the church take a big step forward. I felt like I had done some significant things.”

It led up to the moment when Reagan resigned from the board because he had this increasing sense that he was getting in the way. He felt that his decisions were being second-guessed and questioned by the other elders in ways that he had never experienced. Reagan perceived that James felt that he had to be present if Reagan was there. These feelings went on long enough that it led to the conversation with James regarding his desire to have Reagan serving on the elder board. “And he kind of looked at me like, ‘It wouldn’t be bad if you left the elder board.’ I went, ‘Man, I’m being dismissed totally.’”

When asked if there was anything he would do differently Reagan said that he doesn’t think so. He believes that at some point a transitioning leader has to experience grief. Some leaders make an immediate break with the ministry. He took a more extended time to allow for overlap with the new leader.

I think the transition, even though it delayed that loss, if I had to do it over again, I'd still choose that because I think that loss and stepping out would have been at the moment harder whereas once I got my feet settled in a different lifestyle and then dealt with it, I've always had to balance some of the feelings.

So it wasn't like I was just driving around with nothing to go to. I had stuff that was already starting to happen and that kind of thing. But—but—this needs to be a major part of your deal, I think:

I don't think you can escape the huge loss of identity.

I remember James inviting me back to speak . . . and I almost feel like guys forced him into letting me speak over there. And I'll never forget—I mean I'd only been gone from speaking in the pulpit for eight months—and I remember he introduced me as, "Dr. Reagan Johnson." And I was sitting in this church that I had been in now, almost thirty years and he spoke to me, he introduced me—now I think it was all subconscious—but I do think there was a statement there.

It was like, "This is our visiting speaker," rather than, "This is a twenty-five year directional founding pastor who everybody knows as Reagan."

And he formally introduced me and he did that both services. And it made me madder than all get out. I remember walking up there going, "I've got to put this aside but it makes me mad." It's like this is public dismissal. Everything felt like a dismissal. "We are going to keep you at arm's length."

Now, looking back, I go, "It was—and that's okay." But it wasn't okay in the moment. I mean you can't have a guy back who's been there that long and not create some kind of barriers to keep you own space. It'd be like a son who's got a famous father. He needs space.

Does it lessen the hurt? No, it didn't. I've got to be honest. It didn't. It still hurts. I kept thinking, "There's going to be some kind of appreciation for what I'd done." But there is none. It's, "Thanks for it. Now move out!"

In the midst of this experience, Reagan read from the biblical book of Ecclesiastes. One statement particularly stood out that could be directly applied to his situation. The statement is one in which the author of Ecclesiastes, King Solomon, says that you invest your life building something, you give it to another, and they quickly

forget you. Reagan was learning that this is just the reality of life. It's not something that can be ignored or escaped.

I felt dismissed and I was mad about it but then I realized, more than mad.

I just felt—gone.

That's what hurt, however you describe it, but that there's this fog, this maze that you must go through and you'll have ups and downs but giving guys handles as you interview more and more people will be tremendously beneficial because if I were reading your book and you said, "You're going to feel at times you've been dismissed." I would have jumped all over it.

I use it with guys now and they go, "That's how I'm feeling," cause you've just given language to that emotion.

But it was that lashing out that suddenly, "I can't believe this!" And it was just, "No I'm dying because I've closed a chapter that I didn't think I was going to close."

The sense of loss, dismissal, and loss of identity are issues that needed to be expected and accepted. This has to do with expectations. But it also has to do with "building a life that can stand with it and that's what I felt like my big challenge was. You've got to stand with it and it's okay." Understanding, acceptance, and then movement towards a life and identity oriented in other matters were crucial to Reagan's new chapter in life. Still today he attends church at Community.

I'll see changes and I know every inch of that ground. I know everything and every corner. And people will introduce themselves to me and ask me how long I've come here and when I joined. And it's just . . . now it's almost a funny kind of okayness because I realize it'll be like, my wife's grandfather who was a Presbyterian pastor . . . I'm just a picture on the wall, that people pass and go, "Who's that?"

One can sense the wistfulness, "And yet I haven't even been out very long. But really I can already feel the anonymity." Reagan acknowledged that many predecessors leave the churches in which they have served. His counsel is that if a predecessor stays in the

church or in the region that he/she must build a new identity around friends and not the church which is the opposite of what the prior years had been. There is a note of sadness or even cynicism in the following statements:

You thought you had all these friends because of the church. But you don't have friends. You have users and some of them are friends and the users aren't. The users are just people looking for the person who is going to take care of them. . . . they are looking for a pastor, not a friend. And so you take that title away. . And you just . . . again, it's a huge loss of identity and like my friend said, "It goes on longer than you think and it's more intense." And it was.

I felt like sometimes I just was totally disoriented. I would be driving down the street and . . . then . . . the thing that's weird about these emotions, they came and went.

It'd be one day I'd be driving down—I'd be working on the book. I'd just be having the best day and then I'd go over there and some guy would say something to me or something would happen and I'd just go into a funk. And then it'd be out the next day and then the next. And I was going, "What is this? This is not me.

That went on for a good six to eight months and then one day it just sort of cleared up.

Reagan went on to speak of the process of self-discovery in his first eighteen months following his actual transition. It was almost as if he had served in his role for so long that he could not see as clearly who he was. He came to discover in this new chapter that he needs to lead something. Writing and speaking are not fully who he is. At the time of the interview he was exploring several projects that would put him back into a leadership role. He realized that a part of himself was starting to die and needed expression even if not at the level that he had once enjoyed. He thought that his leadership would continue to be expressed simply by performing a few leadership functions at the church. "And when I got dismissed . . . that was the big wakeup call."

Reagan's counsel to other individuals going through transition is that significant

resources must be invested uncovering what their gifts, skills, passions, and needs are and find other expression for those. “I think I was naïve thinking that I could not lead.”

Another Dimension of Transition: The Willingness to Give Up Responsibility for the Success of the Organization

Reagan believed that his own relocation to another building after his transition was good for his successor. He also recognized that there was advice that he could have offered to James but that there are some things the predecessor is not going to be permitted to give. Those things are going to be better received from someone other than the predecessor. The successor needs the opportunity to do things in his way and in his style and he needs to be allowed to learn.

One of the realizations that Reagan came to was that he had the desire to guarantee the outcome.

REAGAN: I just realized this last year when I got off the elder board. Somehow I felt like that would kind of insure certain stability and maybe I, even arrogantly, thought provided safety for these people that I love.

But actually I’ve had to give it up . . . that it is going to go well. I think it is going pretty well over there but they’ve also got some weak spots in that leadership team. That’s just obvious. Now they’re working on them. That’s the good news. But I can’t rescue them.

And one day . . . I think this was also helpful to me in this grief process . . . It’s hard to even say this . . . but I think you’ve got to look in the mirror one day and say, “It’s okay if Community Church fails.”

That’s still hard for me to say—but I’m not going to feel responsible before God for it. And I had to give that up. Kind of like what you give up with your child. I can’t make them a success in life. At some point they either will be or they won’t based on their choices. I’ve done all that I can do. I really feel like stepping off the elder board was my bookend.

That, “Lord, I no longer before you am responsible for what happens to them.”

INTERVIEWER: That's a huge step . . .

REAGAN: It is.

INTERVIEWER: When you've invested twenty five years of your life in something.

REAGAN: That's exactly right. When you see somebody who's hurting in something that didn't go well over there, that you feel is a leadership thing. It's not even big things but even the little things your tendency is one of rescue . . . to address issues. And so giving that up it's okay, has just been hard.

Reflections for Leaders at a Similar Stage of Life

Reagan shared of a national leader who through his organization knows most megachurch pastors in America. This leader shared with Reagan that seventy percent of megachurch pastors would like to do what Reagan is doing but they are stuck and don't know what to do. They don't want to stay where they are but they don't know what they want to go to. Reagan shared, "If you don't know what you want to go to, you'll just keep hanging on to what you are. It's what I call that slow descent." According to this national leader, they want to talk about it but they don't feel like they can so they hang on. Reagan's own transition frequently opens conversations with others at a similar stage of life who are trying to understand how to approach a transition out of the ministry in which they have invested themselves for upwards of 30 years. As an example, he cited a recent conversation with a megachurch pastor.

I talked to a guy in _____. He had me there to talk about something else, but I think really he wanted to talk about this.

He was showing me the campus, they had a beautiful campus and they had expanded it . . . they had paid the whole thing off . . . and not only that they had made changes in the organizational structure so they were growing again.

And he said, “Reagan, see this wing over here. It’s already too small. We’re going to have to change that.”

I said, “Wow, that’s just awesome what you’re doing.”

And he looked at me and he said, “I don’t have it in me . . . I don’t have anybody to talk to. I don’t want to do another thing. I want to be with the people and love these people and preach to them and disciple some of them but my job calls me to do everything but that. I don’t have it but I don’t have anywhere to go.”

And that led to this really soul revealing conversation. And he was just stuck and yet on the surface, oh my gosh, this place was just awesome. And he was doing such a good job.

But it’s funny. I was having breakfast the last day with some of his staff and one of the guys, one of his senior staff, a younger guy said to me, “Something’s wrong with him.”

I said, “Really, why do you say that?”

He said, “We sit in staff meetings and we’re talking about these next things and he just . . . it’s like he’s looking out of the window.”

INTERVIEWER: So that the staff senses it even though he’s not overtly communicating?

REAGAN: I think for guys as they get in their fifties, having to lead high energy things . . . I think a lot of guys, not all, but there are a lot of guys who come to the end of that. And I even think there’s, you know, there’s a natural cycle in a lot of males . . . they’re actually becoming more relational and they’re wanting to sit and talk and encourage, even though they’ve been high driving . . .

I see it a lot more in me—I think it’s because I just value those relationships a lot more. I think there are guys wanting to do that but they’ve created even more expectations. The church is so good, it wants more.

And what you are saying is, “I did all that. Now I want to enjoy but I don’t have time for that . . . I’m never going to have time for that unless I slow down.”

James, the Successor

James is approximately fifteen years younger than Reagan. When contacted by Reagan, James was entering his final year of graduate school. A mutual investigation took place over a period of about one year. One of James' initial hesitations to pursuing the role was his perception that the successor would be expected to come in and simply maintain the ministry that had been built by Reagan and his two executive team members. James reported sharing this concern with Reagan and his two team members:

I just want to go some place where there's actual need . . . as exciting as it is to come here and be a part, it feels like a ship that y'all have built over the years, and it is sailing and as honoring as it is . . . for you to come invite me. Ever so often you kind of grab the wheel and you get to steer a bit . . . it's never been my life goal to go sail somebody else's ship off into the horizon. That's just not me.

I think it was Reagan or Bob who said, "Well we don't see it that way. We see it as a building and we've laid the foundation and we're not asking you to come finish the building, we just want another generation of leaders to come and add the next level to it. And then hand off the reins when it's time and be thinking about the ones that have followed it.

The team's use of this metaphor was very compelling but James challenged the team by saying that many leaders say that but if the next level that gets built doesn't look like the predecessors had imagined often there is pushback. The team indicated that they were seeking a successor at this point in their lives rather than waiting until they reached the end of their "time and tenure and energy." They wanted the succession process to involve an overlap of leaders so that the DNA of the organization was transmitted while at the same time allowing the new leadership to express itself. Reagan and his two team members were in their early to mid fifties at that time. The recruitment was for a

directional leader but the initial commitment was to become a senior leader not the directional leader. If James demonstrated capability he would become the directional leader.

Joining the Team

James joined Community Church staff as a teaching pastor and was recognized as a senior leader by the elders, staff and the congregation. There was a clear understanding that James was not coming to occupy a “little corner.”

So from day one, the unwritten thing was, “We think you’re that link to the future.” I felt like it but both of us needed to examine.

One, it may play out that I’m not the leader I think I am. In which case I need to embrace that.

Two, it may play out on this side, that’s it’s a different context . . . I mean we both have a freedom in that but a commitment to, to the long term. And they gave me that opportunity to come in under the radar, without the mantle too which I think was very helpful.

You had enough authority as teaching pastor to come in and start earning some credibility, but not so many expectations of, “You’re the guy. You’re the guy.”

So that was never said . . . now pretty quickly behind the scenes, Reagan was mentoring me . . . It wasn’t this, “Win your (spot),” it was just more, “Come be a part of what we’re doing here.”

Reagan and his team allowed time for James to demonstrate his capacity as a leader without the level of visibility and pressure of being identified as the successor. In the first year, Reagan invested a great deal of time simply sharing his leadership world with James. It was a mentoring relationship. After the first year, the movement towards succession became much more intentional. “And that’s the first time, you started actually

hearing, ‘Okay, we’ll do this with leadership, then with staff, and then unveil to the church.’ It was a much more formalized plan.

To James’ surprise, the team did embrace more change than he had expected and thus responded favorably to his leadership. Even though they had long tenure and were recognized as the leadership team, they allowed James to lead.

I think one of the great signs of their humility of leadership is from day one, there wasn’t this sense of, “When you finally are in your stride we’ll . . .” I mean it was, “You know we’ve called you in this role. We need you to lead.”

Part of it was almost a humility. Part of it was the pragmatism of, “If you’re going to lead in this space, you’re going to lead in this space. We’re not going to sit around and let you just be kind of along for the ride.”

And the flip side of it though is, it’s huge humility that you just look at that and go, “Man, here’s these guys who have been doing all this and they create leadership space for you to win, and set you up for the win.”

This attitude was a crucial attitude for James’ success as successor—a predecessor who was willing to allow his successor to lead.

Challenges in the Transition

James’ succession, though spoken of in seminars and articles as one of the model successions, was not challenge free.

The Cultural Mystique of Team

Community Church was nationally recognized for its unique model of leadership. Rather than having a senior pastor, Community Church had the executive team of three that lead the ministry. This team of three, Reagan, Bob, and Blake, served together (at the time of James joining the team) for almost twenty-five years. They had known each other

before joining together as a ministry team. The church was launching and quite small as they began their service together. There was the strong overlap of their families and friendships. This mystique of team was one of the organizational stories. Reagan, Bob, and Blake spoke of it as an ideal as they shared their model with other leaders and in educational settings.

James came and had “an expectation that these are the three amigos. They love each other. They hang out all the time. You hear the stories and all that and then you get in and you realize they’ve outgrown that but the legend hasn’t.” This was a big surprise for James. He discovered that there was little overlap and communication between the three. He did not feel that they were ever disingenuous about it but rather that the public perception was that Reagan, Bob, and Blake have a sense of camaraderie all the time. The reality was that the organization had grown to such a level that they were leading in very different arenas. Their families did occasionally get together, but these happenings were fewer and farther in between.

As James began to build his own team he discovered the expectation within the staff and the congregation that the team mystique be carried on. He recognized, however, that the context was very different than when Reagan, Bob and Blake began to lead. The church was much smaller. There was a much smaller staff. Due to the large organization, the leaders did not have the same intersection of life as they had in the past. James’ leadership and relational beliefs were different as well. These beliefs and the outworking of those presented some early challenges.

I’m pretty pragmatic myself of, you know, if you were to come on staff today. We’re going to have a relationship. We’re going to do life and there’s probably things I don’t like about you, things you don’t like about me, but we’re going to go on cause I can usually make a relationship with

everybody. But there's another part where you can't ever do that. And you've just got to embrace and I saw that I had no clue how much the body though had an expectation. And so trying to manage the expectations of things like that mystique—you can't do that. That was an ah hah for me.

Staff and Relationship Issues

Years three, four and five were very difficult years for James. He described them as so difficult that if he had known when starting what he knew now he probably wouldn't have come. Year one was simply a year of proving himself. He was not identified as the successor during year one. Year two was the behind the scenes processing with the board and staff regarding his role as successor. At the end of year two James was announced publicly as the new directional leader. In year three he co-led with Reagan. Reagan had increasingly fewer responsibilities. It was during year three that it became apparent to James that the job performance of the staff director was increasingly marginal. The positional responsibilities had grown beyond this leader's capacity to manage. However, this individual was loved by the staff, was very relationally oriented, and had long tenure but was not performing satisfactorily. Additionally, a serious personal conflict existed between the staff director and one of the executive team members. In fact, the conflict was significant enough that these two individuals were not on speaking terms. This state of conflict was very counter to the stated cultural values. The elder board and the executive team were aware of these issues but failed to address them. The problem was serious enough that it could not be ignored.

As James began to deal with the staff supervisor, he began to uncover an undercurrent of attitudes among some staff towards Reagan. As Reagan's national visibility increased, the board took strong action to keep Reagan engaged and happy at

Community Church. The action rankled some of the staff including the staff supervisor who felt that Reagan wielded too much power. As the transition moved forward, the elders asked what James wanted to do with the staff director. James thought that he could salvage the director. He demoted the staff director, informing him that the position had outgrown him. He moved him into oversight of a new major ministry initiative believing that this new initiative would not only be a compelling project for the staff director but would be useful to the church as well.

At the same time, James hired a new staff director. The lack of match and capability to the role became immediately apparent. Within months the new staff director's credibility eroded significantly. The staff did not receive the leadership it desperately needed during this time of transition. The former staff director failed as well in his new role and continued to fuel the discontent among staff. James said to the former staff director, "You know, you're not helping us. Even your 'loving' people. You are loving the past and it's not even a past that exists anymore." The former staff director projected his experience with Reagan onto James. He feared that James was going to be the autocratic leader that he perceived Reagan to be and so he challenged James' decision making on a frequent basis. Many hours were invested trying to make the relationship work.

I'm spending hours with _____ and I told him, "Every time I'm with you it feels like you're talking to Luke Skywalker and you think you're Yoda and Reagan is Darth Vader. You're scared to death I'm going to go to the dark side and be this tyrannical leader that you see him as."

And he did see the darkest side of Reagan. So he has this fear of it . . . but I said, "I don't need Yoda. I really don't. I want your wisdom. I want you to call and to speak your mind but I can't live in this."

Within eighteen months and after unsuccessful remedial steps, James terminated both of these leaders. This took place shortly after Reagan and Bob stepped completely out of their leadership roles at the church. The firing of the popular former staff director was the hardest blow for long-term staff members.

It was brutal . . . so what you've got is the church body just trying to embrace this change. The staff, especially some of the long-term ones, are trying to figure out, "Where are we going? What does this mean for me?"

And then in pretty short order, you came out and the two biggest guys they knew between them are gone.

And it's just like somebody said, "You know you walked into this place. And it's like a herd of water buffalo that were out there drinking kind of wary. And they saw the two biggest ones get shot and so they're all going, "If you'll shoot him."

It was during this time that the church felt the force of the transition most powerfully because up to this point Reagan was in the office next door to James. There was this sense that as long as Reagan was around things would be "okay." James reported that his own personal frustrations reached a peak when an individual came to him after the firing of the former staff director and said, "It just so disappoints me. I mean Reagan loved _____. And they just worked so well together. I just can't understand why you can't work with him." She had no idea of the conflict that had long existed behind the scenes nor the struggles with which James had to deal.

Expectations, Change Fatigue, Comparison and Leadership Style

James experienced the unspoken expectations in the time leading up to his transition. These expectations became clear in his first years after the transition. This transition was not simply the transition of Reagan but also of the executive team. The transition was not just a one-to one replacement of Reagan but of Reagan and Bob as well

as the addition of new executive team members. Blake remains on the executive leadership team but James found that the mystique of organizational “team” dynamics and the aura of the three, Reagan, Bob and Blake, hovered around his early leadership.

As James reflected on the construction of his own executive team, he became convinced that the next teaching pastor needed to be younger. The congregation (and its leadership) viewed itself as a “young happening church” targeted for thirty-year-olds but James’ assessment was that its ministries were targeted at least ten years older than that.

In terms of change, the congregation saw the movement towards a younger communicator as well as the termination of two senior staff members. There were several other visible staff transitions as well. Then, without advance communication to the congregation, the leadership sold the church property. These changes and others contributed to a sense of instability in the church body. This was a very difficult time for James.

The hardest point for me was pretty quickly on I recognize, “I’m not Reagan. I’m just not. I got different gifts.” But he’s one of those peculiar—you know because of that though we had reached a point where, I mean elder meetings and everything, it was Reagan’s kind of bottleneck, rubber stamp on everything . . . but anywhere I was decisive where I needed to be [others] saw that as going there [high control] . . . so it was always, you’re on the slippery slope.

James sought to lead and yet decentralize leadership. He wanted a team filled with members with more “leadership space” who are allowed to lead. This was a different style of leadership and the change was difficult. “There’s been times where I’ve just gone, ‘Lord, why in the world did you want me to come here and follow him and have to live everyday comparing the times on things you never thought you were going to compare it on?’”

In that particular time (years three and four in particular of James' transition) the changes, coupled with the different style of leadership, led some to conclude that he was doing a grab for power. Even his relationship with Reagan was difficult.

I'm sitting there going, "Y'all don't even realize how powerful it was."
And you get the knock on you, "you don't value your team like they did in the past and you're doing the grab."

We were riding the turmoil all that, the firing and I didn't have leaders around that I could lean on . . . And I know it wasn't until December that Reagan actually stepped off the board—and that was huge—just even in the air in the room. . .

And here's the hard part. Reagan is still a mentor of mine. I love Reagan. Now he went.

Another big ah hah for me is: I don't care which leader they are, we're all fragile and he went funky for a while.

Feelings. Pure feelings, getting his feelings hurt all the time, and I'm just going, "I'm not trying to hurt your feelings."

Now here's the flipside of it. I'd go through the same seasons where I'm getting my feelings hurt all the time. No matter what he did. It just felt like . . . and he'd go, "Wait a second. Okay this isn't him. It's not me. It's something that's bigger than us."

He's at a great place now . . . I can go meet and tell him what I'm feeling, what I'm thinking and in that season the one thing we had, we'd spent enough time in relationship with each other that we always shot straight with each other on stuff and that helped. Cause if I ever thought I couldn't do that with him, then the whole thing would at some point . . . you just, you're alone, so there's times I can go and he'll go, "Yeah I know what that feels like."

James also spoke of Reagan continuing to lead in meeting settings like he had in the past. It created tension for James. The leadership was very confident in Reagan's judgment and capabilities and so with the new leader and the seasoned leader in the same setting they tended to defer to Reagan.

What was killing me during that season though was, we'd talk about stuff. I'd come up with something. Well then we go to the board meeting. Reagan can't help but . . . I mean those times you're ready to and he's jumped in. He shares it all. "Hey, we ought to do do do do." And everybody [says], "Man Reagan, it's so good to have you here."

There was a season where I didn't mind that cause I just thought kingdom-wise it doesn't matter.

James shared a specific example of a new ministry initiative that he developed. But as he thought about giving the initiative the best possibility of succeeding, James felt that if Reagan presented it to the congregation the congregation would embrace it. So James sold Reagan on the idea. Reagan loved the idea and presented it to the church body.

James reports:

I remember I was walking down the church and this lady grabbed me. She goes, "Do you just sit at his feet just waiting for ideas to drop like that. I kept walking out and going, "God, why does that bug me so much?"

I think that is some of the most personal part of the journey.

James viewed the transition period, particularly when there was comparison and some rivalry, as a very difficult but very shaping period in his life.

Consolidation, Transforming and Stabilizing

The first place that James sought to stabilize the ministry was at the elder board level. There were challenges with some of the leaders as James sought to earn their trust. A number of the more veteran leaders were nervous about any changes during the time of transition. James acknowledges that early on, he did not invest enough attention to the board members, nor did he realize that they were sharing concerns of the congregation as their own. The transitional period was very exhausting emotionally and required

investment in areas that he had not anticipated, including investment in the outgoing leaders and the leadership vacuum created when they stepped down.

I didn't realize how much energy I was going to personally have to invest in helping Reagan, Bob and Blake make their transition. I thought I'd spend all my energy on helping me set up my new team. And it took a lot of hours of just talking through how they were in that journey . . . to the point that when they did step out, there was a vacuum there 'cause I was not prepared.

So I'd hired thinking I'd have that and then that's not working and the guy I'd held on to wasn't working.

I thought, "Oh no. I have not built. I've built with these guys so much and I should have built more with who I was going into the future with . . . and so . . . the turning point for me was okay, I go, "This thing isn't about me, but if I don't make it more about me and my team, it's only going to get worse, that people think it's about me and so it was counterintuitive for me cause I was always . . .

"As long as I'm connected with them, serving them, serving them," and then you look up and go, "Wait a second. That's bad leadership. It's got to be about me and the team around me, not to supersede that, but I am the guy here and I'm the one in this position and so if I don't embrace that and move forward with it, then it's only to isolate me more."

And that was I think the key turning point of looking around going, "Okay, who are the guys I need on the leadership team? Who are the guys around me and my biggest push with the elders was . . . this thing has outgrown the ability of a teaching pastor team to lead it."

James was describing a seminal moment when he realized that much of his leadership energy was being invested in those leaving than in those he needed in order to move into the future. He needed to be more intentional and visible in leading, including intentionally constructing his own leadership team. The transition was more than just about him assuming Reagan's role. It was about building his team, a team that was different than the composition and function of the team of three that had led the organization for more than two decades.

Staff Leadership Changes

James believed that Community Church needed exceptional leaders whose gifts and skills were not such that they would serve on the teaching team and yet they would have the “same platform of leadership and influence that teaching pastors have.” He experienced the tension of the past model in which the three executive leaders were also the primary communicators. The size of the team needed to be expanded and the skill level for leadership needed to be increased. James acknowledged that he believed that at the time of the interview, the elder board was just beginning to understand this leadership model. The church body is still prone to look to the preaching leaders as the real leaders of the organization. He believes that high level organizational leaders “can’t be underlings over here. They got to feel like they’re really part of the decision-making team.” This model of non-preaching senior leaders is one the biggest changes under his leadership and in recent months has begun to provide benefits for James’ own stress reduction and life management. James is trying to counter the rubber stamp mentality that he felt existed under Reagan. Practically that means that his leadership team members can make decisions in their areas of oversight and can also disapprove his ideas and requests.

Board Personnel and Function Changes

As was reported in Reagan’s interview, the board some years before had divided into two teams: an operational team, the decision making body, and the shepherding team, the congregational care body. As James observed the executive team meetings and the elder meetings, his assessment was that there was a lot of redundancy in the meetings; the elder operational team was too hands on and needed to move more into a governance role (philosophical/broad oversight versus strategically and tactically oriented away from

operations); and that some board members needed to transition off the board due to their inability to adapt to the role of an elder in a megachurch setting. He, in conjunction with the elder board chairman (former executive team, Bob), has transitioned the board and staff to these distinct functions. This represents a change because Reagan was the “driver of both,” governance and operations. This dual role often led to confusion and redundancy. The mixing of governance and operations functions continues to be a struggle simply because the board was so accustomed to operating in both realms.

Reflections on Transition from a Successor’s Perspective

The interview closed with reflections on several issues of transition.

The Length of Overlap of the Predecessor and Successor

One of the interview questions asked of each successor was, “If you were to give counsel to an organization who has a senior leader who would like to transition, over what period of time can they remain on in any capacity.” James’ response was that he believed that the new leader needs about a year to lead within the organization and then a year during which time the transition is made public and then a year that the congregation experiences the transition. He thought that two years but no more than three was the time needed for transition. He believed from his own experience that the longer a transition goes on, the messier it gets.

Nobody realizes until you’re in it, how emotionally draining it is on both sides . . . that you can’t help but hurt each other. Even though you love each other but, “If I need to go lead I’m going to have to do things that make you feel like you’re being slighted.”

In the same way for you just to be here, the new guy can’t help but always feel that . . . are we ever going to turn the corner? Are we going to do this?

And I don't care who they are. I think you go longer than that and you just get into no man's land of emotion.

The Presence of the Predecessor

One of the often raised questions in churches is whether or not the former senior leader can remain within the church. James' perspective on this question was that it depended greatly on the chemistry between the successor and the predecessor and the general make up of the predecessor.

If he has no authority and I mean like in our case you could set up a side ministry . . . that's fine. I think he can be there depending on the guy. I think some guys can't . . . my kind of litmus test to determine if he's the guy that can or cannot—if he demands authority some place or he's got to have something, he's not going to do well on his own.”

The question was rephrased to ask, “In general is it a good idea?” The “idealist” in James said, “Yes.” At this point in the transition James meets with Reagan once a month. He is feeling less comparison on a day-to-day basis than in the past. He acknowledges though that a part of this speaks to Reagan's self-awareness regarding the tendency of others to compare. Also Reagan is a very entrepreneurial leader so he is motivated to find new challenges and to launch new initiatives with or without the church. Reagan wanted to stay in his community and within the church as an attendee and it appears to be working.

James felt that the church benefits from Reagan's broader initiatives but did not believe that most senior pastors share Reagan's entrepreneurial spirit or broad mix of gifts.

Not only is their identity in it but their skill set is in it and so you put them out here in no man's land, especially if they're in their fifties, in that time frame. Even though they left thinking, “Oh yeah! I'd be happy. I'm so tired of running church. I just would be happy . . . just being around the people and if I could speak from time to time . . . I'll just write some

books or that but I will not get in anybody's way. Trust me the last thing in the world I want is to go to another meeting."

Because their identity and skill sets are in it, they can't help but go back to where they got the strokes and felt like they were a contributing part of the kingdom. So unless he's got a skill set that allows him to create another world that is partnership with the church, I would say it will not work.

That's my personal take on it and I think those guys are rare than . . . the hard part is most guys don't realize they don't have the skill set to go do it

A lot of them want to step away from time and messiness but they still want to keep the authoritative stick. That, if push comes to shove, "I could still come in here and throw it down and know it's going to influence this decision."

Loyalties to the Predecessor

Another insight that James shared from his experience was that it is over time and through special experiences that people get connected to leaders. As a new leader coming in, no matter what he/she does and no matter how much the church may change the new leader will never be what the preceding leader was at some point in the past. This is a reality not to be resented or resisted but rather accepted and embraced. It is possible that a portion of the congregation will never embrace the new leader as they embraced the predecessor. At the same time there are individuals who are experiencing particular experiences that are bonding them to the successor. Understanding this is crucial "otherwise it is maddening."

There's something about the mystique of the church planter, the founding guy who really took it (the church) through that, that season with it.

I don't care how successful you are at UCLA you're always compared to Wooden.

You can't fight this thing . . . it's going to be what it is for people and if you can't live in that space you'd better go find someplace, that you can.

I don't think everybody can . . .

That's the part where I kept going back to, "Okay God. You got me here. Okay. All right, as long as I know you got me here . . . I got to leave that stuff to you."

James also acknowledged, however, that if there hadn't been the evidence of the establishment of his leadership, acceptance of him as a person and leader, and a decreasing sense of comparison, he would not have survived. If the sense of the former leader's shadow had remained as powerful as in his early months and if his predecessor had fostered continuing loyalties, deep frustrations would not have allowed him to survive. The transition moved more quickly than anyone in leadership had anticipated. He spoke of a friend who succeeded a long-tenured senior pastor. The original plan was for a transition with both leaders in place for seven years. About three years into it, the successor realized that if the transition did not come to closure much more rapidly that he would need to leave due to the increasingly confusing dynamics between staff, the predecessor and the successor. James also spoke of one of the most well-known churches in the country, First Baptist Church of Dallas. The transition process at the church following W.A. Criswell was disastrous as Criswell refused to move out of his role. He showed up at meetings and openly critiqued his successor. The successor resigned within the first eighteen months, Criswell stepped back into the leadership role and it was another decade before the church was able to secure a new successor. Criswell's death eliminated the challenge of dealing first hand with his fifty years of history at the church.

The Opportunities of Huge Initiatives

A consistent theme in a number of interviews in this study was the opportunity that large initiatives provide to either establish leaders or torpedo their chances at success. For James, one of the initiatives was the sale and relocation of the campus. With the turmoil surrounding the dismissal of staff, the change in teaching pastors, and the resistance to a different style of leadership, the campus initiative seemed to come at an inopportune time. However, it provided James the opportunity to visibly lead. He realizes as well that the new campus will result in a completely new identity and additional separation from the “way things were.”

Hiring the new executive team with its increasing success and credibility with the elder board and the congregation is increasing trust and confidence in James’ leadership. Empowering the executive team before the congregation to lead in areas that had been historically led by one of the three teaching pastors is the next major step in their development as well as James’ preparation for his own eventual transition:

Unleashing the team is the next challenge, then as I unleash them, even release them to support things that I would be prone to handle, hold onto ‘cause I find identity in it. That’s one I hope I can keep for the rest of my tenure, however long it is.

What am I letting go of? Cause the day is going to come, I got to let go of all of it just like the guys who came before me so if I’m practicing it now, then does it prepare me for that move? Then it’s not so radical.

Right now I see that and I don’t even know what that means. I know I won’t like it.

Thoughts on Leaders and Longevity

Like Reagan, James mentioned the enormous day-to-day challenges for leaders of large ministries. James spoke of many leaders in their mid-fifties who have been worn

down by the long-term demands of serving in a large church ministry. Again the challenge of personal finances looms. James gave the opinion, that although these leaders could serve in academic institutions, many do not because of the financial challenges. They are capable of serving in other roles but the reality is that their peak earning opportunities are in the arena of remaining as senior pastors in their existing churches. Thus they remain, in James' opinion, distracted by other interests, less passionate about the local church cause and worn down by demands. James said that the burned out leader is a challenge for churches.

JAMES: It just seems to me with so many guys who are hitting that mid-fifties and at some point I think you just only have so much energy in today's kind of church I think the guy that could do the forty years in that position the church was different back then. It just was. There's a certain drain and so I think guys hit that wall quicker.

INTERVIEWER: I think you are right. I think that the demand of the kinds of ministries that we lead today . . . culture has changed. There have always been difficult people in the church but I think the numbers of people that are willing to be critics and the consumption model [have changed].

I mean our culture is consumerist. We commodify everything including church. There's a weariness that goes with that. And then coupled with the physical difficulties I've had the past couple of years and I'm just saying, "You know. I'm not sure I can lead well as long as I thought I would. So I'm for the first time beginning to really think about it.

JAMES: Yeah cause I thought . . . coming in: "These guys may be stepping down at this age. There's no way (that) I am." And then you hit this wall.

I don't know if I'll make it that long.

Signs that it is Time to Transition

In an unrecorded follow-up interview the question was posed to James: What were some of the signs that indicated it was time for Reagan to fully step down? Three

things stood out: Impatience with process and so the movement to a more autocratic style of leadership; frustration and anger at dealing with day-to-day issues coupled with a failure to deal with serious staff or ministry issues; and finally, loss of passion for the ministry of the church and increased passion outside the church (or outside the areas of ministry most needed for long-term ministry success.)

Bob—The Current Board Chairman/Founding Executive Team Member

Bob is unique among those interviewed as he experienced the transition as a executive team member and then moved right into the role of board chairman. Bob spoke not simply of the transition of the directional leader but of his own personal experiences in transitioning out of the founding leadership team role.

Bob's Readiness for Transition

Bob shared of his own conversations with leaders who are in the forty-five to sixty age bracket who have been serving in senior leadership for twenty-five to thirty years. He spoke of the almost universal experience of those he had spoken with who begin to feel the long-term wear of responsibility. Reagan described it as long-tenured leaders having a low grade fever. Bob shared his own experience at around age fifty:

BOB: The thing I realized was, I was tired. Not negatively. I was just tired—the pace, the intensity. I didn't realize that I was more stressed about my role than I realized.

And there's an intoxication; there's an energy in that that is good. There's an energy in that that can be dangerous, woefully dangerous.

And then there is kind of where I was . . . I wasn't aware that it was taking, taking so much that I really wasn't Bob—the Bob who is really Bob.

I am now more relaxed and engaged, working hard. I'm not talking about not working hard or anything like that

INTERVIEWER: "I'm not the person that I normally am" . . . waking up and feeling that and saying, "You know I'm expending this amount of energy but I only have this much right now."

BOB: A health crisis is almost like a triggering device and that makes sense that it would be because all of a sudden you are more in touch with your vulnerability . . . How fragile we are. I've got a shoulder injury and a hip injury, I haven't been able to play golf for over a year. I mean it's bizarre, I'm a little bit more in touch with my limitations and so it can be a triggering mechanism . . . beginning to evaluate and realizing that there is life outside of being a godly, dutiful, responsible, mature faithful pastor. Without making any of that bad. There is life beyond our local church—for us, for our people, for our wives and for fun things.

Bob spoke of realizing that he had a lot of energy for other projects and other opportunities. There was a shifting sense of enjoyment or passion for the day-to-day routines resident in being a senior leader. He spoke of the desire of being freed up and the realization that somewhere along the way life had become less enjoyable due to the weight of responsibility. He had forgotten how to play, to have fun, to have adventures and to take risks in personal life. "It's like we forgot how to play guns. We forgot how to play and we just became really responsible."

Bob's First Memory of Leadership Conversation Regarding Transition and the Vision for Transition

The executive team went on a retreat with their spouses. The church was between fifteen and twenty years old. They were sitting around the dinner table one night speaking about the future, specifically about the idea of succession. Bob remembers the conversation as reflection on the fact that there would come a day when each of them will need to "raise up new leaders and transition." Although no one else interviewed from

Community Church shared their experience at this retreat, Bob shared that this retreat conversation was a defining moment for him.

Two of the motivating factors for Bob's participation in this conversation were related to a long-view vision for the church and recognition of the need for younger leaders to reach young generations. The vision of the three founding executive team members was for a church that did not last for thirty years and was impressive for just one generation. Rather the vision was for "the hundred-year church." They didn't want to be part of a church that in Bob's words "had no future. That felt like a real loser to me." This was a significant motivating factor for being intentional and strategic in planning for their eventual transition.

The second motivating factor was the belief that leaders tend to minister best to their own generations "because we would begin, just by the nature of our life, stop speaking to the younger generations, in which case we'd start determining the demise of your church." He said that he wasn't certain as to which age that might be but he suspected it started in the forty-five to fifty-five age period. This belief spoke to the need of developing younger leaders as the leadership team grew older.

An important realization in this conversation was that transition would spell a significant change for each of them personally as leaders.

I remember one of the statements—I don't remember even who made it—but I remember one of them was, "You know there will come a point where we do transition and let's say we hang around the church. The reality will be that within a couple of years no one will know us."

Now that's an overstatement new people come and old people leave . . . what we meant was, "They won't know you as Reagan, Bob and Blake. They will meet you in the lobby and say, 'How long have you been coming?' And you will say, 'As a matter of fact I've been coming for

thirty years.’ And then someone else who is feeling uncomfortable will say, “well, he was a founding teaching pastor.”

So I remember that and we said, “But you know the reality is that the church doesn’t owe us anything. It doesn’t owe us money. We’re being paid. We’re doing our job.”

“And there will come this place where we don’t know what all that will look like but in good health, we will be wanting to de-emphasize us and emphasize the future because we’re about the future. We’re not about the past. We’re not about hanging onto the past. We’re not about memorializing the past over and over and over. That’s not who we are. We’re looking for a coming day, a kingdom you know and all.”

So it was a very healthy discussion. And that was sort of the seedbed I think of a lot of my thinking about it.

The Community Church leaders recognized that there were limits to their effectiveness and that the chronological age for the need to raise up younger leaders to minister to younger generations is well before age sixty-five . . . that artificially defined age of retirement due to social security laws. It is possible to overstay in a position or to fail to transfer areas of responsibility where leader effectiveness may decrease over time.

The Transition Process

Bob spoke of the key attributes desired in a successor as well as his perspective on the transition process. He spoke of the importance of working together over time with the potential successor. The leadership team was seeking to understand, “Do we have chemistry? Do you have the DNA?” They knew that James was a gifted communicator. They had subjective measures such as, “Do you like each other? Could you see yourself doing this together? Do you want to hand off (to this person)? Do you trust each other? Do you envision the capacity for trusting each other?” Bob knew that these questions could not be answered perfectly but that there needed to be a strong affirmative sense of

the answers to these questions because “the lives of the people in your church are at stake, not just your own.” The process with James was almost five years including the first year when the interview process was taking place.

Key Attributes of the Successor

The key attributes identified by Bob were:

- Leadership gifts: someone was needed with a proven track record of leadership throughout his life (junior high, high school, college and career);
- Geographic connection to the region. The Community leadership believed that someone from the region would have fewer social and church cultural adjustments plus provide the opportunity for more family ties;
- The same vision, mission and values. There needed to be “just an overwhelming unity . . . and passion around those so a lot of our discussions centered there;”
- Commitment to team ministry. This had been a strongly held value of Community Church from its inception. The leadership believed that there is “synergy in team ministry . . . there’s wisdom in a multitude of counselors . . . and in team teaching it’s the same thing . . . there’s a broader exposure to the life of Christ to people through more than one as opposed to one.” The team leadership allows for leadership and interconnection of other areas of the church;
- Servant leadership: this spoke to leading by example and humility of leadership;
- Chemistry with existing team and leadership: “It’s totally subjective. Is there trust and camaraderie?”
- Calling. Does the leader feel like this is what he/she should be doing at this time?

Community Church's executive team encouraged James to interview them with the same rigor as they examined him. They wanted him to understand that there was permission to ask the congregation, staff and leadership any questions as not only was the church making a significant commitment to him, he in turn was making a significant commitment for the future there. This sense of openness and the absence of secrecy were important to James' own sense as to the leadership culture of the church.

Parts of the Transition Viewed as Strengths

The first strength that was mentioned was the leadership's perspective of the transition not as an event but rather as a journey and a process. The transition took place over a period of years. Months were taken in conversation leading up to even pursuing a successor. A profile was developed. Multiple individuals were involved in discussions with the eventual successor. The successor was brought in as "a senior leader" not "the senior leader." This orientation and proving time were crucial to the eventual success of the transition.

Second, there was a long period (almost three years) in which there was an overlap with James and Reagan (as well as Bob).

James came on. We didn't go anywhere, so there was this period of . . . there wasn't an abrupt disappearance of what had been. I think that's stabilizing. It started to give the sense that James has come to add continuity . . . which I would recommend (to) anybody in succession . . .

He didn't have to start full orb. There was a period of learning. Being a part of the board meetings. Being a part of management team, kind of executive team meetings, all of that.
Learning, learning, learning the way.
People learning him, getting to know him as he taught.

Third, and flowing out of the second, was that of a “trust transference.” Bob spoke of this as asking “your people to begin to look to this new person—to trust.” Trust is built over time through the demonstration of capability and character. James was not known by the staff, leadership and congregation when he first came to Community Church. The leadership took intentional action to build James’ credibility with the congregation and sought to accelerate the congregation’s and staff’s knowledge of James by sharing stories of their experiences with him. Speaking of the congregation:

They don’t have a million decisions that have been made and stories and equity with the new person, and creating James—telling—I mean, team. Telling stories on each other, laughing and together, doing services together—setting them up to win. I think . . . the majority of it we did that well.

A fourth strength of the transition process was that the transition process was conducted during a time of strength in the organization. This was not an organization that had plateaued or was in decline. As Reagan had shared, Community Church was actually in a significant growth period at the commencement of James’ ministry. The leadership team of three was in their early to mid fifties. There were not performance issues on the part of the executive team members. There was not the diminishment of capabilities nor conflicts among the executive team members nor with the elders. This was not the matter of a forced exit nor a situation in which there were private, off-line conversations regarding a problem leader.

Aspects of the Transition That Were Not Optimal

In Bob’s opinion the manner in which Reagan made the announcement regarding his departure was “way too strong . . . I’m gone—I’ll never—not here. I think in fairness to Reagan that was because of his own emotion and I think he would say that but I think

it was way too strong and too disruptive.” Bob did not believe that it needed to be nearly as disruptive or dramatic. Rather he would have rather seen Reagan say:

The last twenty eight years have been phenomenal years and I’ve been blessed . . . I am transitioning and I’m really excited about James and we all are . . . And we’re going to continue to be a team, it’s just not going to look the same and I’m going to be doing ministry X . . . I’m going to be doing these other things. I’m going to be out a lot.

Bob believed that less attention should have been directed to Reagan’s own personal angst and more attention directed to the continuity within the organization, the exceptional new leader that Community Church now had, and the new opportunities that Reagan was pursuing.

Bob wished as well that more stabilizing comments had been made by all three members of the executive team. These comments would have served to indicate the continuity and presence that would occur with Bob’s and Blake’s leadership roles and occasional speaking. Bob felt as if the congregation and portions of the staff were left to guess as to the attitudes of the three executive team leaders regarding the transition. As a result, questions arose within the congregation: Are Reagan, Bob, and Blake leaving us? Are they being pushed out? Are they unhappy about the transition? What do they think about the new leader and the team he is assembling? Is everything changing? What is happening to the church? With less dramatic yet more specific communication the agitation and unsettledness caused by Reagan’s dramatic announcement could have been largely avoided. Bob continued his remarks:

“I’m going to be out a lot.” But I wish we had also said, “James has asked and the board, we’ve all agreed, Blake and I, we’re going to keep teaching here, two or three times a year, for another season cause we [want to] develop new teaching pastors and that all. So we just want you to know we’re excited that we’re transitioning, we’re progressing, but we’re not leaving you at all.”

I think that would have been much—clearer—digestible. It says the same thing but it doesn't unnecessarily destabilize people.

Bob was not suggesting that the leaders be dishonest about the grieving they were experiencing due to the change of role. Rather he felt that the means in which Reagan's experience was communicated result in "too much shock. Shock and awe kind of a deal," for the congregation.

Bob did not experience nearly the angst that Reagan experienced. He felt that a part of that was that he had been allowed to have much more proactive and continued involvement in the church. He continues to serve as chairman of the board of elders. He has been able to work alongside of James. That level of continued involvement was not considered possible with Reagan. There were two reasons for this: One was that Reagan's style of leadership would not lend itself to serving alongside or under James. This sense of the strength of his presence has been addressed in earlier pages. Staff and the board had been too accustomed to looking to him for direction and approval. His continued presence would be disruptive and counterproductive to James' leadership. The second reason was that Reagan had shared that he was ready to get out on his own. He was ready to pursue his interests without the encumbrances of fulfilling roles within the church, the daily demands of dealing with people, and the structures of board and staff.

Bob felt that the outcome could have been different in terms of Reagan's current relationship with the church.

I still believe this: if he gave a message once or twice a year—unannounced—no big deal. He just is there and everybody welcomes him and he shares a little bit about his journey and what God's been doing in his life and he doesn't vision cast. He is a guest speaker—in a role.

The Groups to Be Considered in Transition

Bob identified four groups to be considered in transition: the predecessor and his/her spouse, the staff, the board and the congregation. Bob suggested that these four groups all need to be considered in a transition because each group is impacted by the transition. As he reflected over Community Church's transition process he wished that the board and the senior leadership team had developed a clear plan with each of these groups before communication began to unfold within the organization. He suggested that more questions be raised early in the process to bring greater clarity to the process, again seeking to avoid some of the uncertainty and misunderstandings that unfolded. He suggested the following questions be raised by the predecessor and by the board:

- What is my relationship with the board?
- Is it good?
- Do I have trust?
- What is the vision going to be?
- How are we going to communicate it?
- How are we going to communicate it to the staff?
- How are we going to communicate it the congregation?
- How are they going to come along(side) me and my wife . . . pray with us, make sure we're emotionally solid . . . our identity crisis?
- How do we want to relate to the church?
- How are we not going to?
- What are our needs?
- Those are some of the big pieces that get missed.

Bob also believes that churches tend to think more in terms of a replacement mentality instead of a natural progression that takes place within organizations over time. On the whole he believed that they did many things well including communication of the process and honoring leaders. However, he thought that it could have been more holistic and unfolded with greater clarity if they had considered the four groups impacted by the transition.

He posed that the transition process could be started by the board meeting with the predecessor and his/her spouse. There would be no agenda other than allowing the predecessor and his/her spouse to share what they envision for the next chapter in their lives. Questions would be raised about their own identity and what they are passionate about “because if God is not calling them in their heart, not just their head, their heart, about this transition, it’s going to be harder for them than they realize.” This conversation would be the first of many conversations. Permission should be given to all sides to begin to talk through the process and timing. Bob suggested that two or three leaders from the board be assigned to help the leader process through the decision over a period of a year. These leaders would seek to “be their cheerleaders, advise them, help them figure things out . . . let’s not leave them.” This speaks of proactivity by the leader and the board.

Bob’s Own Personal Side of the Process

Early in the process, five years before his eventual transition, Bob and his wife took a sabbatical. They dedicated part of that time, separately and jointly, to think about their futures. Bob identified two primary areas of passion: developing younger leaders as church planters and challenging mid-life men to invest the remainder of their lives in something significant. During his sabbatical time, he identified five men to meet with him on a weekly basis. The group was to think together about the next stage of their lives. “We’re going to process this journey together of wanting to discover how we can make the next thirty years count.” It was a significant series of conversations for Bob and these five friends.

It was also during that time period that he and his wife began to talk about how their identity and sense of significance would be impacted by his transition out of a senior leadership role. He acknowledged that it is impossible to process all those things until a person actually transitions. He said that the sense of the losses of transition hit him most strongly when he moved out of his office and left the management team. It felt like freedom but he missed the serendipitous relational connections. He felt that his transition was easier than Reagan's because he remained on the board, chaired the board, spoke once or twice a year, taught several classes for the church, and was involved in establishing new churches as outgrowths of Community Church.

Again, Bob's comments point to the importance of a transitioning leader to have other significant interests and challenges towards which to move. He was ready for greater freedom in the next chapter of his life and wanted to develop ideas that he had been working on (but did not have the time to devote to while serving as a senior leader of a large ministry).

I feel more like . . . in some ways I can't really describe it, but I am feeling like the person I know I am. And it's different from what I've been doing for twenty some years. Again it's not the other one is bad. It's just that you stepped out of a role, you stepped out of a function that you were proud to do, you were glad to do, you were zealous about doing.

But all the sudden you went, "Wow! That's a fresh wind. There's life in this and so for me" . . . It's not a hard trade for me. I'm trading this new freedom and focus.

I am losing, "Founding, teaching pastor in front of thousands of people every week and preaching," in favor of, "freedom from daily responsibility, counseling, working out operational matters, preparing to preach." So it felt like the gift to me was time and freedom. The identity crisis was not being known that way. That hasn't been as hard for me as Reagan.

His wife as well experienced the loss of identity of not being known as the pastor's wife and the accompanying broader span of relationships that her role brought. (This was not a formal role but an informal role in being identified as a part of the leadership group). True to what the group at the retreat years before had imagined, people do not know who they are. Bob and his wife are asked occasionally how long they have been attending the church. He says that he is okay with the anonymity and simply wants to help the new leadership team succeed.

A Time of Crisis During the Transition

During the time period when the executive pastor hired by James was failing and the other former senior management person was not functioning well in his new role, Bob observed that there was a leadership vacuum. This vacuum created significant concerns for Bob as chairman of the elder board. It was a time of instability in the congregation as well as the staff. As the situation continued to deteriorate, Bob did an intervention and began to invest thirty to forty percent of his time back in the church ministry. He acknowledged that his involvement felt like micro-management by the new leadership team but was regarded as essential by the elders. He stepped back into roles that he had performed in the past with one difference: he was clear that he was there to help James succeed as a leader. He was not stepping in out of his own inability to separate himself from the ministry nor was he stepping in because it was believed that James was incompetent. Rather he was seeking to prevent escalation to a full-blown crisis. Additionally, he was seeking to prevent James from making the type of leadership mistake that might be considered irrecoverable.

I met with James.

I said, “James, I want to help you win. If that’s thirty years long, I’ll do that. I don’t care if anyone knows but we’re going to have to meet regularly for us to accomplish these things and become more proactive and pick up . . . pick up things we can’t drop. We can’t drop these balls. We can’t be in a reactive place. That isn’t going to work and it’s going to come back on you and I don’t want that.”

And our whole board weighed into all of that. But it really pulled me back in really last year more than I would be willing to do.

Bob acknowledged that decision processes and lines of authority were fuzzy during those times. The intervention process would have been cleaner if the board had specifically identified Bob as a consultant to James for a period of time.

Also, he believes that he (Bob) and Reagan should not have stepped out of their executive team roles before they were confident that the new staff director was performing satisfactorily in his role. He said that James thought the new executive pastor could perform the role but in a very short period of time it became evident that he could not. Bob acknowledged that all the senior leadership had concerns regarding the capabilities and fit of this individual in advance but wanted to give the individual the benefit of the doubt. His dismissal and the dismissal of the former staff director person had a “sizeable impact.”

Upon re-immersion into the ministry, one of Bob’s key roles was to push James towards the development of a broader and more diversely skilled leadership team. The establishment of this team coupled with the intervention of Bob and others “started turning the momentum.” Bob believes that Community Church now has an outstanding team. He also believes that this period of instability could have been avoided if the right person had been hired for the executive pastor position. This unsuccessful hire resulted in

the staff being without leadership during an enormous time of change. By default, staff began to bypass the executive pastor and went directly to James. James understandably was overwhelmed by the volume of requests coming his way and as a result decisions and implementation were delayed. This resulted in additional frustration followed by the exit of a number of staff members. When the two senior level managers were dismissed, the remaining staff members were unnerved. Without executive level leadership and the perspective of the elder board and the long-term senior leadership team, staff members felt that perhaps other staff members were simply being dumped. There did not appear to be clear direction nor a vision for ministry. Staff morale was low and there was a climate of fear as to who would be next to go. James had not yet earned trust.

In retrospect, Bob believes that much more significant investment in the development of the entire new senior leadership team should have taken place early on. Additionally, more transparency regarding the process with the entire staff and church body would have eliminated a significant number of the concerns. Communication that a significant change was going to take place over the next several years; this change would be messy and confusing at times; the change may take longer than planned; but change is something that all organizations must do to remain effective for more than one generation.

Bob's Assessment of James' Performance

Honoring the past and genuine celebration of the contribution of past leaders was one of James' actions that stood out most to Bob. This was not a once and done action but rather an ongoing mentioning of names of the three senior leadership team members publicly and privately. Recently James and his executive team held a surprise

appreciation for Bob and Blake in appreciation for founding the church thirty years ago. The three of them sat in front of the staff while Bob and Bill told stories and laughed together about the past. “We . . . [felt] greatly esteemed by the team.”

On the negative side, the adjustment between Reagan and James did not “go as cleanly as you’d like it.” Bob felt that the board and the past senior leadership team should have provided greater clarity at various points during the transition to clarify the changing roles of Reagan and James. Decision process and authority were confusing at times. He suggested that clarifying Reagan’s role of coaching and advising versus leading and deciding would have been helpful. Bob felt that at times James was not as open to input and did not appreciate the fact that the former leaders were “trying to put him in a good position, giving . . . history, institutional history.” James felt at times that if Reagan was in the room, Reagan would talk to everyone and so everyone looked to Reagan. Bob did understand why James would wonder what Reagan was thinking and what others thought Reagan was thinking. He concluded that it was probably wiser to have the predecessor step off the elder board sooner and to be simply used by the successor as an advisor rather than having to navigate the nebulous grounds caused by role confusion. When Reagan and Bob did step completely out of their roles, other people stepped up their contribution in ways that would not have previously happened because their contribution did not appear to be needed.

The other issue that was difficult for James in Bob’s perspective was the constant comparison. James said to Bob, “You don’t know how hard it is to hear Bob, Blake and Reagan. Bob, Blake, and Reagan. Bob, Blake, and Reagan.” When James disclosed this struggle to Bob, Bob clarified his own attitude to the transition:

I probably don't. I haven't heard that . . . I don't hear that but I just want you to know in my mind, I'm not thinking about Bob, Blake, and Reagan or their show. I'm thinking about James, Dan, Phil, Carlos, and Keith and where we're going cause that's where we are.

We're not there. We're here so that's what I'm living in and passionate about and thinking about and dreaming about . . . if we don't succeed here . . . that is absolutely meaningless to me cause it's just this flash . . . this thirty year flash . . . and that's not very meaningful to me.

Counsel to Others Entering Transition

Trust is, in Bob's perspective, the single most important issue. For there to be the greatest probability of transition success with all four groups (person/spouse, the board, the congregation and the staff) there must be a context in which there is trust—a sense that there can be openness, conversation and the commitment to the good of each of the groups.

I've got to know what kind of trust capital exists between you and the senior pastor. In other words, I need to know how healthy your relationship is and I need to know who has really been leading this church. Has the (senior pastor) been leading it or have you?

Are you a weak board that has been supporting him or are you a strong board with vision because one of the things you're going to be challenged to do is come up with the next vision that's going to be part of his transition.

In the absence of it, there's going to be a vacuum and it isn't going to be good.

Bob believed that helping the predecessor develop a new vision for his/her own next chapter and being supporters, advisors and champions of his/her new career are important dimensions of the board's role with the predecessor. He strongly believed, based on Community Church's experience, that this should be done before anything is publicly communicated. He emphasized the importance of involving the predecessor's

spouse as well as the idea of enabling the predecessor to speak directly with other leaders and their spouses who have been through a similar transition. Bob believed that it was very important that the board be proactive in helping the predecessor think through this major change for the individual, his/her family, the staff, the board and the congregation rather than allowing the leader in isolation to try to sort through all the issues. Again, the hope is not simply a successful transition but greater stability during the time of change. The deliberate and trusting openness allows for the predecessor's wisdom and perspective to be solicited in terms of the future vision as well as the roles of existing staff.

When the transition is announced, it is not from a sense of reactivity and uncertainty that often exist when a senior leader leaves but rather with a vision for the future, of which the transition of the senior pastor is a part. The senior pastor can share that this has been a journey together with the leadership and that the staff and board can together unfold the vision for the future. All four groups need to grieve, celebrate, and allow the relationships to change. "Let the relationship change. Let one thing die and something become new and have some memorial markers that declare in a very positive way, 'We are doing this.'"

The board needs to develop a communication strategy, a time line and clarify the hiring process. All of this is intended to facilitate a successful transition that views transition as a continuation of the ministry of the predecessor "even in times of transition and change. We're teaching the church how to do this." The congregation, staff and board related to the predecessor in different ways: father, friend, teacher, teammate and employer. Those roles will and must change for the transition to be successful.

Rex—A Board Member

Rex is one of the newer board members at Community Church. He has attended the church for approximately ten years, serving as a board member for five years of that time. Rex is a lawyer and entrepreneur. He recently turned age forty, thus being the youngest of those interviewed at Community Church.

General Impressions of the Transition

Rex said that the need for a transition evidenced itself in several ways. A smaller percentage of those attending were contributing a higher percentage of money “which is usually indicative of an aging population.” The church population was aging with “fewer young people coming in and getting plugged into the ministries.” This was counter to the trend of the demographics of the region. The style of music was not current with the musical style of younger adults.

Strengths in the Transition Process

In Rex’s perspective, “a lot of things have gone well.” The first noticeable transition for the congregation was the change of communicators in the main services. Bob began to preach less and James, Reagan and Blake became the primary teaching team. Then it became predominantly James and Reagan. James’ presence in preaching was a very significant factor for the transition.

I think he was set up really well, as far as introduced to the church. He’s an incredible communicator and so instantly he was winsome because he was the young pup to a lot of the church, twenty years younger than any of the existing teaching pastors.

Rex believes that the historic mindset of the senior leadership team of establishing an enduring ministry, one that is successful beyond one generation, was also an important factor in helping the transition succeed. He believed that the understanding of the senior leadership team that change must happen if a church is to succeed long term caused them to be more open to change than may be typical of long-term leaders in churches. Again, this understanding “played really well to his transition.”

Another important decision was that of easing James into his responsibilities, being mentored by Reagan during the transition, and learning from all three members of the executive team. Much of this learning came through Reagan who focused on the history of the church and the patterns of how the leadership and the congregation historically have interacted. This time of easing into responsibilities allowed James to observe how Reagan led in a variety of situations and gave him, “some time to start discovering his own style of leadership which was different than Reagan’s.” This easing in time was a very conscious decision by the elder board.

Also during this transition time the board sought to take a more active role.

We tried to protect him as much as we could and weigh in on decisions and became really more of an operating board for a while than an elder board or a board of directors needs to be. But that was part of the transition. I think that went well most of the time.

The thought was not only to protect him but also to communicate to the congregation by the protection and direction the united support for James by a long-tenured board.

Areas of the Transition That Could Have Been More Effectively Managed

Rex believed that Reagan had a “flair for the dramatic at times.” His announcement of his transition was in Rex’s opinion intended to elicit emotion.

“Something significant is happening here.” The drama of his announcement did elicit a reaction that caught the leadership off guard. Reagan knighted James (sword and all) as a symbol of James becoming the directional leader. It was viewed as an anointing of James as the next leader and the disappearance of Reagan as the former leader.

I thought that probably could have been done better. I think that was a little too shocking. And if I’m not mistaken it seemed like Reagan left right after that for a couple of weeks on vacation. It was something. It was like, “Okay! Great! The bombshell and now he’s gone.”

Another dimension of the transition that needed more attention was understanding and communicating the leadership style differences between Reagan and James. In the early days of the church, the team of three was viewed as leading the church at the same time but in the years leading up to the transition, “Reagan had taken on more and more of a directional leader role, probably even more so than the congregation was aware of.”

His style is very directive. Very inspirational . . . kind of a bit at times a John Wayne-ish style . . . You had a body that had been used to that and grown with that . . . I think you start seeing a body as often reflected by the leader or the lead communicator and so you had . . . a body overall that was used to that.

James, however was viewed by Rex as a much more personable communicator and overall a better communicator than Reagan and possessing a different style of leadership.

It’s more coming as one of us versus the general standing on the hill calling and saying, “Follow me, this is where we’re going.” James would be more, “Hey let’s all go together on this. Come with me as we go.

James’ Greatest Challenges

Rex believes that James has done a “really good job,” but that his challenge was and still is finding his own leadership voice and style (particularly when Reagan was on

the scene). The differences between the two leaders were highlighted during the knighting when Reagan gave James the golden sprinkler head.

It represented that he [James] needed to be keeping his eye on everything going on on campus even down to the sprinklers. And I remember sitting in the audience and thinking, “That’s a very different style of leadership than I would or a lot of other leaders would [have] where it gets down to that micro-level.” . . . I think it weighed on him [James] more than he realized or admitted for a while. He may admit it more now.

A second challenge was for James to deal with the critique of certain members of the congregation. During some of the major transitions the board believed that they were protecting James and yet not to the extent that James actually needed.

Even though we were protecting him, it didn’t feel that way to him. And we probably let him take—he was taking more heat and feeling more heat from the body than what we realized.

I think a big part of that was the transition of Bob and Reagan and then obviously as you know the sale of this campus and moving to a new church and there are a lot of people that felt alienated by that . . . even though they really embrace an elder-led church, on something of that magnitude, it kind of fell back into, not a majority, but a vocal small group. They were, “Why weren’t we brought into this decision-making process. And that was hard. You know the easiest reason is that it was highly confidential . . . we had to be extremely careful. I was amazed at how well that was kept under wraps . . . but I think that was very difficult on him.

The magnitude of changes occurring in the early tenure of the new leader not only presented opportunity for critique but also was a bit destabilizing with the church congregation.

He did not have the capital built up—relational capital built up with the body yet and so he was an easier target that could start creating this sense of uncertainty. And you didn’t have the calming presence of the founders around as much, Bob, Blake and Reagan.

The absence of a strong executive team was another big challenge for James. Bob, Blake and Reagan had the benefit of twenty-five years together, each of them

demonstrating strong skills and working cohesively with each other. James did not have that in place nor did he experience the benefits of being a part of the team. Blake and Reagan were not James' peers "because they were in very different stages of life and they hadn't done life together." James' first major hire, his first peer relationship did not work out. That failure was very difficult in the face of dealing with other challenges.

That's difficult on any leader when you got someone that you're bringing on and you develop a good relationship with them but they are just not right for that position and it's hindering, it's not really helping you like it should—in fact, it is costing you more time to deal with some of the issues. And so he did not really have a team for his first three years here. I think he hunkered down and worked through it but that would have helped tremendously—to have that.

When asked if James inherited some situations with which he shouldn't have had to deal, Rex acknowledged that personnel-wise there were some things that could have been handled before he became the directional leader. The former staff director in particular was one that wasn't handled. Although James took responsibility for addressing the situation, Rex believed that the elders could have provided greater support and help. At the same time, in Rex's estimation, James should have asked for additional help before he felt so overwhelmed.

I think it was part of that thing I think you get caught in. As a leader he felt like it was now his responsibility whether it had been passed to him or not and wanted to handle it. But it was so much more draining than he could have ever realized. And you do have the elders that have been on the elder board for fifteen-twenty years that were willing to take on as much role as need be . . . it was kind of a both sides probably.

I think as an elder board we probably should have recognized that and stepped in a little quicker to say, "No. No. That doesn't need to fall on your shoulders as much as it is." And he should have asked for it [help . . . but we were pretty new together to . . . there were about four of the twelve of us that had been on there for, um, just four years or less. So we were still gelling as a group, a group that had been called to lead the business

side and the overall, overseeing in spiritual leadership of the church and we're feeling inadequate as well.

So it was a bunch of inadequate guys that are doing their best to, to-um, to govern the way we've been called to.

Impact of the Transition

The magnitude of change within Community Church had a significant impact. Again, changes included not simply the change of the directional leader but also of the senior management team, the sale of church property, the dismissal of the two most visible staff members, and change in leadership style. Rex believes that the biggest impact was on the staff. He believed that there were “pockets within the body” that were significantly impacted and vocal. Within the staff, however, all the changes created uncertainty and instability. A climate of fear was “allowed to get a foothold.”

And once again you go back to, um, James hadn't been here long enough to establish enough relational capital to calm all that. And even . . . if he had, there would still be that at that level. But it was just more so because it was new leadership and . . . there has just been a lot of changes.

The leadership sought to address the instability and uncertainty within the congregation through communication—both by more frequent and in-depth explanation and by really seeking to listen to what church members were perceiving and experiencing. Certain personnel matters could not be discussed at length and the personal relationships that individuals had with dismissed staff members certainly was a difficult factor. “That's really a hard part of leadership but a reality is that you can't please everybody and you're going to have to make tough decisions and be able to withstand that scrutiny.”

Rex suggested that two factors have been particularly important in moving from a deep sense of uncertainty and instability to “an incredible time of momentum and healing.” The first was the articulation of a compelling vision for the future. The second and the most important factor in Rex’s opinion, was the formation of James’ executive team. The exceptional credentials, diverse skills, and performance of the team have provided an exceptional sense of direction and have also inspired a sense of confidence with the congregation and staff. Skills sets include financial management, strategic planning, decision making, communication, and bridge building to the staff. “[We] just got these guys that, I think for the first time James feels team and those guys were able to move in and start reinforcing what the vision of the church is.”

Rex believes that these two factors were instrumental in winning the confidence and trust of a number of those who were concerned within the congregation. However, Rex acknowledges that at the time of the interview there were still pockets of resistance, “silos or fiefdoms,” but the situation was much better than it was eighteen months prior. The elders as well were experiencing growing confidence in their ability to trust James and his team.

Reflections on Transition

James was “knighted” by Reagan and yet another year passed before Reagan ultimately “passed the mantle.” Rex offered reflections from a leadership perspective.

Greater Clarity of Roles, Responsibilities and Transition Timetables

Lack of clarity in roles, responsibilities and transition timetables resulted in tension in the board meetings. At times the tension was considered healthy tension in which an exchange of ideas between Reagan and James took place. Sometimes the

conversations moved into a realm that was “too operational, too detailed . . . but it was kind of this exchange and even a battle of ideas at time.”

A question I would ask them would (be), “Would a more, up-front, as detailed as possible discussion of roles and responsibilities and transition timetables . . . have been helpful?” Cause I think that kind of went back and forth some.

Cause Reagan is such a powerful and unique leader that it’s hard for him to sit on the sidelines. And when he and James were in the room together, Reagan would tend to dominate. Even if he didn’t try to dominate at times because he had twenty years of being up front and launching __ (a national ministry) __ and national speaker.

I mean he has a presence that any man that had been in that type of role for so many years has over someone who is just starting.

There was tension caused by Reagan’s powerful presence and by the absence of greater clarity of decision making, roles and responsibilities. Rex believed that forethought rare for any organization was put into the overall transition. He cited a Fortune 500 company, his former employer, that also went through a transition. That transition resulted in tremendous growth but the transition itself was “rough” and wounding. In comparison, he felt the transition at Community Church was handled effectively but could have been less traumatic for all involved. “Maybe that’s wishful thinking or . . . (we) could have avoided some of the tension or the miscommunication but I wouldn’t have a suggestion on that.”

Reflections on the Role of the Predecessor Within the Organization

Rex believed that the transition was difficult for both Reagan and James. For James it was because of the “big shadow” that Reagan’s accomplishment and leadership presence cast. For Reagan, it was difficult because he was “no longer ‘THE MAN.’”

When he would walk down the hallways, he wasn’t involved in the strategies, the new direction and all that. I think he felt at times like a

ghost. I think it was the word he'd used. A ghost kind of floating around because he is such a strong leader he needed to be leading something. . .

Another part of the challenge of the overlap with the predecessor was the tendency for the predecessor to continue to assume control and to foster being looked to as the leader. The elders fed this by responding to Reagan over James because of their long history.

And so if he did not have that (leadership role in a situation) he would step into that and it would find him. And he would want to find it and fix it or just jump in and all in the best interest.

I think for the guy who is the, was the protégé and now the successor, I think that can be extremely difficult because—yeah—I think it would be actually harder on the guy who is trying to lead now.

Because you got the guys that, if you're in the room together, an issue comes up, they're split on who they're looking to first.

I mean he could say something and then the predecessor says the same thing a few minutes later and it becomes an incredible idea . . . it's that relational capital where suddenly, "Oh great idea. Where did you come up (with that)?" "I don't know it just came to me."

Rex believed that if the predecessor moved into a separate realm and refused to get brought into decisions and daily operations that the predecessor could possibly retain a role in the organization.

But in general I say you should not have him there. Or it should be a very short transition period. I guess somehow you'd find a way to prepare that on the front end, so you minimize the impact out on the body and staff. But as far as the overlap, I would try to minimize that. I think that went on a little too long.

In terms of financial arrangements, Rex was more inclined to pay the staff well, set up a strong retirement program, and encourage the staff to set aside and to plan rather than count on a "big stipend or bill to be there forever at such a high level." It unnecessarily burdens the church to have a long-term financial commitment to the

predecessor. Rex opined that unless a person owns a company that ends up going public, pastors need to set funds aside just like everyone else.

Next Important Steps for James as a Leader

Rex believed that James needs to continue to establish himself as a directional and visionary leader. James continues to live in the shadow of Reagan as well as the “hurriedness of major transitions.” The result has been the absence of time to “reflect and be able to cast vision.” Rex believes that James wants to do this and is capable of doing it.

A second step is the continued building and bonding of his leadership team. “To lead them to understand how together with their roles, they’re so much more formidable than as individuals.” Rex has high regard for James’ team and is hopeful that this team will remain in place. He is concerned that James monitor the dynamics of the team and the satisfaction level of team members so that long tenure and leadership effectiveness will be the legacies of this team.

Another step for James is growth in understanding the dynamics of leading a large, established, successful organization.

It’s a lot different coming up in an organization that started as a seed and has grown into a tree . . . you know coming . . . when the tree is well-rooted and growing. But that’s just a totally different feel and that’s just going to take some time.

A final and the riskiest step related to James proving himself in the arena of Reagan’s greatest accomplishment. Up to this point, James had not stepped in to lead and to speak in the primary ministry that Reagan had founded and led for more than fifteen years. Rex believes this will be a very visible proving ground.

A very important time is this next year when he leads ___(ministry)___ which was Reagan's vision, his baby. It's all over the world now . . . James is going to be stepping in on the home turf of that. And it's got to be more than just rehearsing what Reagan has done and adding a few of your own stories.

It needs to take on his persona and that's big.

I really at first—a few of us didn't think that now was the year to do that with everything else on his plate but I'm glad he did.

It's a big risk and I like that. I think that's important for him right now . . . I think he's going to knock it out. I don't know though . . . that's the part I love to see us go to as leaders . . . I have no doubt that it's going to do great but there's a chance that it might now and I love that he's willing to take that.

The guys who are supporting him in that . . . I think it's as strong or stronger than it ever was when we were in the height of ___(ministry)___ . . . I love it. It's gutsy. It's kind of like stepping in after Bear Bryant or something like that.

Transition Advice

Based on his experience of the transition at Community Church, Rex offered counsel to other ministries beginning to think about transition:

- Start the process very early;
- Invest significant attention to understanding your model of ministry and the characteristics and qualities needed in a successor;
- Develop a comprehensive, transparent communication strategy and then communicate frequently in diverse settings. Communication is essential to maintaining trust. Rex reflected:

You want to think through how you communicate and how it will be received in the different audience members but I always think that the over-communication . . . particularly in our day and age where people are real quick to go to conspiracy or cover-ups. There's so much they're so

used to having as much information as they want at their fingertips that if you're not giving to them or they start hearing it from someone else.

It's just like we assume the worst and that's what trips up the leaders out there that are public figures now. If you—if they try to hide anything, or aren't—don't appear at least forthright with the information on a particular subject . . . it's assumed, they assume the worst.

I'd say that's a big aspect . . . the communication side and to me it's really hard to think that you could over communicate it but it does need to be the right kind of communication.

- Advice to the predecessor: “I would just to continue to walk in humility . . . Don't over-estimate what you mean to an organization . . . cause we all do that.”

Blake—Current Member of Executive Team

Blake is one of the original triumvirate. He is the oldest of the three and is the only one of the three still involved in the day-to-day operations of Community Church. Blake spoke of a team leadership model popularized by researcher George Barna in his book *Team Leadership*. Barna speaks about different leadership aptitudes: directional, team building and strategic aptitudes. Blake said that they wanted to have a team ministry but didn't “understand the dynamics that would make that successful.” Barna put words to what they experienced in their team. They had a directional leader, Reagan; a strategic leader, Bob; and a team building leader, Blake. Blake believes that this is why their team functioned so well together.

Blake's always desired to continue to be a part of the church even after stepping out of formal leadership. His dream was to develop a mentoring/discipling track to train leaders in the fifties age bracket to mentor younger leaders. In terms of the transition

itself, Blake saw himself as being the bridge between the first senior leadership team and the second team.

Conversations about Transition

In Blake's accounting of the transition, the first conversation took place about eleven years ago or approximately seven years before James arrived at Community Church. There was a long-term commitment from the very beginning of the ministry to have a ministry that endured for more than one generation. As they entered their mid-to-late forties the thoughts and conversations of transition became more intentional and more specific. Their commitment was to make a smooth transition to the next leadership team. They did not know what all would be involved but knew that they needed to start early in that process to allow for many conversations, planning and communication.

Because of the way we see a team ministry functioning, we felt like the first person that we would need to find would be that next directional leader . . . we knew it might not necessarily happen on the first pass—you have to be realistic about how those things would play out and so eleven years ago when I was about fifty, Bob was like forty-eight and Reagan was like forty-seven, in that time frame there . . . we started thinking about that, praying about it and then began looking.

As the three leaders moved more intentionally towards transition and “dreamed with the elders about what the new team would look like and what roles we would play,” in Blake's accounting, Reagan was clear about his future.

I really won't be able to stay within the church having been the directional leader here. There would be too many people that would want to hang on to that. They could create confusion between myself and the new directional leader . . . I really will need to find a ministry that focused outward.

Bob realized that as a strategic leader he would be focused outward as well because “he would want to help train and launch and then support young men out in ministry who

were planting churches and being that strategic thinker, he's a perfect fit for that." A part of Bob's role is helping these younger leaders think about the next step in advancing the ministries that they are leading. Bob is a gifted problem solver. Blake, again, anticipated remaining within the church. "I think we knew ten years ago that we . . . knew what our gifts were, we could articulate those and we knew what our tracks were going to be in the future as this transition took place."

Entering the Transition

Community Church's first attempt at identifying a directional leader resulted in the invitation of Phil to join the staff. Phil was the pastor of a church twenty-five miles away that Community Church had started a few years before. Phil completed a residency program at Community Church and was an outstanding communicator. The congregation "loved him," but as the senior leadership team spent more time with him in the day-to-day operations of the church, both Phil and the team began to realize that he was not really a directional leader. In the senior leadership team's assessment, Phil was more of a team building and strategic leader.

This led to a second attempt. J.R. was a staff member at Community Church leading the ministry to single adults at the time. J.R. seemed to possess the directional leadership traits that Reagan, Bob, and Blake believed were needed for the next chapter in Community Church's ministry life. J.R. and Phil, however, decided to leave together to serve in a ministry in another part of the country. They have proven to be a very effective team together.

The first two attempts involved an investment of about four years. The process had to be started over again. It was in the first year following the early attempts that the

first contact was made with James. Blake mentioned Reagan's mentoring of James and then the transition over time of entrusting more and more responsibilities to James.

The Formation of the New Team

Blake shared his perspective on the change in the leadership team in terms of personnel and structure. The original executive team was made up of the three individuals, Reagan, Bob and Blake. They oversaw most of the ministries of the church. As the church grew, however, the leadership team, the staff, the elders and the congregation were feeling increasingly the strains of leading such a large ministry:

I think that it probably caused Reagan, who was our directional leader to become, um, more directive in some ways. We had a larger staff and things were not as communal and connected as they were when we were smaller.

But because we have this team mentality, sometimes people didn't seem to respond quickly enough with the size we were. We needed to be able to act quickly in order to turn this ship—it takes a while to turn it.

And so I think we began to feel some pressure in how we function together as a team. Because of size of staff and in the church I think we began to feel some of that, although we couldn't really articulate not having been there before.

Changes in the Board and Senior Leadership Team

The elder board found that it could not be as responsive as was needed for the ministry to function effectively.

We felt it on our elder board and because of that we developed two teams on our elder board, one operational and one shepherding . . . the elder board . . . was about fifteen people. . . there were some people on that team who were operational . . . there were others who were more ministry-oriented and yet we found ourselves bogged down in lots of operational types of things . . . sometimes the guys who had more shepherding gifts didn't feel comfortable in making decisions that quickly, weren't even as interested in that conversation.

The operations team was designed to be smaller than the original board with no more than ten members. The shepherding team grew from the time of the division of responsibility from seven members to thirty-five at the time of the interview.

The operations elders became a leadership team with more involvement in key decisions of the church. Over time, though, the operations team recognized that as the church grew, the team needed to become less involved in day-to-day operations and become an oversight board. A more diverse executive team needed to be developed in terms of skills, age and experience. The current executive team has seven individuals including James and Blake. Two of the members have been in the church for more than twenty-five years and have been called upon for their experience, history and wisdom. There is a mix of what Community Church considers strategic and team-building members.

James' Demonstration of Leadership Capability

At the time of his recruitment James was aware that he was being recruited to become the directional leader. However, the understanding was that “anyone we brought in, we needed to test the waters and that person needed to prove themselves in that role for a period of time where we could observe them.” Blake does not recall that any specific time frames were identified although the leadership wanted to give him one to two years, not longer than that, to demonstrate his capabilities.

We'd had some interaction with some churches whose transition had gone longer than that and it had become frustrating for the new leader—to be there, too long with that kind of a setting, so we were pretty committed to trying to keep that shorter rather than longer—as soon as we felt like we really knew, “This is the guy.”

Blake felt that right from the initial interview James struck them as the next directional leader. Rather than seeming a bit star-struck about coming as a thirty-four year old to such a visible, large and successful ministry James came with an appropriate sense of confidence.

James came in with the attitude of—which is exactly what we wanted, of “I’m not here to maintain your church—to maintain what it is that has been developed here over the first twenty-five years. I’m really here to take it to the next level.”

That had always been our dream . . . that this church would develop to a certain place and when we hand it off, it would be like a platform that somebody could build from again. (We) would have a certain mindset here in the body and we do have that. And that is to be equipped for the work of service and have people out in the community doing that service but (who) wanted to say, “Then say . . . what is the next step? How does that expand and morph and change into something even more than what is here?”

James seemed to have that spirit about him and the confidence to be able to do that even though he knew that there would be a learning curve involved.

A second factor was that from the very beginning as James stepped into the role of teaching and leading in different settings, it was clear that he “had our DNA” and was very comfortable in leading in the various settings. As mentioned in previous interviews, team ministry was a crucial strand of the DNA. “Team ministry requires two things. It requires trust and humility.”

You have to trust the other guys that you’re with. That they value you and your gift. . . there’s this trust that there’s a sovereign God who is involved over all this and there are people who you can trust.

They will say better things about you than you would say about yourself . . . not in a flattering way . . . but it’s because they want to do ministry. . . there’s not a sense, not a concern about jealousy or competition between staff members . . . everybody is looking to the fact that this is God’s church. You know, a loving sovereign God is directing this process and he has just the right people there in concert to pull that off.

Blake expounded on the humility aspect of team leadership as understanding “how God made you” and valuing that.

You don't want to be somebody else. You're not coming in, in the guise of one thing, hoping it will give you the opportunity to do something else or that type of thing. But you see yourself as being gifted in a certain way to complement the group in a way that makes this ministry work and function. And then part of that trust factor . . . is that you trust that other people value that gift as well.

Blake was clear that although the directional leader is important, his importance is not emphasized to the diminishment of other team members. He believed that each team member must have an awareness of who they are and possess the belief that everyone is important and every gift and skill is valued.

That's what we experienced the first thirty years in our team ministry . . . and it was important that the team function together effectively so that the body would see that we believe and they would further believe that the church belongs to Christ and not to anyone.

It's not about a personality—that type of thing. It's about him [Christ] and what he wants to do and so that blending of gifting even added to the whole philosophy of equipping the saints for the work of service so each person would see themselves as being equipped to use their gift. And everyone's gift was important in the body. And that was being modeled at the top that every gift was important in the whole process.

James knew he was the directional leader but had the humble spirit needed to understand that he needed other skilled people serving along side of him. Blake believed that James came to a whole new level of awareness of the importance of other skilled leaders as he stepped into the directional leader role and experienced a leadership vacuum. There were not skilled individuals in place and that team development process took longer than he imagined it would take.

Challenges for James during the Transition

Blake was clear that James did a number of things very well in the transition. He demonstrated humility by genuinely honoring and esteeming those who had served before his time. He openly acknowledged their contributions and accomplishments. He did not dismiss the past as insignificant. “I think that people sensed that and loved him for that.” He was an effective communicator. He proved himself in teaching a class that Reagan had taught in the past. Blake did not believe that the congregation would say that there was any great “public gaff.” He did identify five challenges that were difficult for James.

The first challenge was in the area of the lack of staff leadership. Blake deflected blame away from James regarding problems in this area. He believed that the magnitude of need in a very short period of time given all the ministries that needed to be maintained was the primary cause of difficulties. It took longer to recruit the critical staff than anticipated. He observed that the absence of critical staff made the church feel like it was stuck in transition.

The lack of staff . . . have made us feel at points like areas of ministry that were thriving in the past now lack the leadership they need so he (James) began to feel the pressure . . . (Reagan’s departure) created additional pressure because the new staff had not been hired . . . then all of the sudden there was a little bit greater hole in the public teaching aspect that hadn’t been filled.

My experience has always been that people will hold on to something until something new or better replaces that and they didn’t have that new thing to look to and be ministered to and see what the future would look like with it and so I think from a schedule standpoint and just a weight standpoint, it created some pressure for James.

A second challenge, alluded to above, centered around several areas of ministry strength that were languishing primarily due to either the failure or the departure of a key

leader. These will be more specifically identified in a following section on situations that James inherited.

A third challenge was that of living with comparison. Blake's sense was that few in the congregation would have realized the intense scrutiny that James felt even though his attitude was that he had not come to Community Church to just maintain it but to grow it and to "grow out of the foundation; build on the foundations that have been here."

James told me that someone came up to him, this might have been within a month or so after the mantel had been passed from Reagan to him publicly and made some kind of statement like, "Do you realize how big the shoes are that you've got to fill? You know that type of thing. And James said, "yeah I really do. I understand that" . . .

But I think very much he felt like, "I'm an individual. I've got my own personality. I don't want to be Reagan. I'm not trying to be Reagan."

But the comparison to Reagan, I think, even though he probably intellectually knew that would be there. I think emotionally, that it was more than he envisioned. Having to live with that comparison . . .

I think the comparison would have been there whether Reagan had been here or not and Reagan continued to be in the pulpit like once a month or so for about a year.

A fourth area of challenge was in role confusion. Blake reported that Reagan initiated a conversation with James to talk about the questions that people were asking him (Reagan) regarding the ministry. Reagan affirmed James' leadership and the ministry direction but felt that his presence (Reagan's) was now hindering the transition.

Blake summarized Reagan's conversation as:

I think it's confusing to a certain degree to have two directional guys here at the same time and he said, "I think I need to step out of the pulpit maybe completely out of it for a period of time. Where people know I am now a pastor at large and I'm not the directional leader, even though we've said that publicly. Some of them won't let go of that. You know, clinging to the past."

Blake thought that James really appreciated Reagan's decision. Reagan saw the conflict and was willing to completely step away even though he was about fifty-five years old, "Pretty young to be handing off the church that completely. I don't think that Reagan originally envisioned it would go quite that way." Of course the departure added to the gap in staffing that was already being felt. Blake reflected that the role confusion coupled with comparison were very emotionally draining for James.

Blake theorized that Bob's and his role were more in the areas of strategic development and team building and so people did not see them as "taking them somewhere as much as they do a directional leader." It was more natural to be able to provide support for James without people looking to Bob or Blake as to why a current course of action was being taken as opposed to another course of action in the past. "I think it was easier for us to stay and be an integral part without that being some kind of a threat or a challenge or a negative to him."

A fifth challenge related to several previously mentioned challenges was the absence of his own team and evaluation of James against the team of three of the past.

I think he has always seen that as being more supportive in some ways although there is always just the contrast of James, until the team is there. James and Bob, Reagan and Blake.

And so it's almost like . . . "There's no way I can have all those giftings that three people would blend and yet I'm being compared like it's one entity."

And Bill stepped out and so he was no longer functioning here in the body and so people felt the loss of that gift as well . . . even though I'm here and a part of this team, I think people see that as transitional, even though supportive and providing continuity and good, they don't see me as the team of the future.

I don't think he (James) feels the same level of getting on with life as he would if the new team was complete. In that process, I'll continue for a

period of time to be on that leadership team to provide some wisdom and connection with the past and those things in the positive sense of, “We’ve been through this before so let’s don’t make this mistake again.”

So I think that while he felt Bob and I were supportive in some way, we also represented that past team and comparison being made between him and that past team. I don’t see how a guy could not feel that.

Roles Important for Those Transitioning

Blake identified two primary roles for those transitioning out of senior leadership.

The first is to build expectation of the future and yet continuity with the past.

I’ve made statements from the pulpit on three or four occasions in the last two years, “I think the best days of Community Church are still in front of us. They’re not things we’ve experienced in the past. They’re still in front of us.”

I have people say, “That really helps me. To know that you were there then and that you’re there now, both in the inner sanctum of both of those and that you believe that because I can’t see all those things. Or I may be experiencing an area that’s not functioning as well as I thought it did in the past from my perspective. [When] you say that, it really helps me to continue to move forward and to believe that we’re going to build off of that foundation and the future is going to be better.”

If you can provide some expectation for people about the future and your commitment to that and see you continue to be involved . . . in very (tangible) ways in serving the new vision and the new staff teams . . . I think that encourages them.

A second role is that of relational connection. People have come to Blake and said that it is important for them to know that their pastor knows them. Those who have been in the church for an extended period of time want a connection with someone that they know. They may say, “I love where the church is going. I agree with the philosophy of ministry but you know, a church of __(number)__ thousand, it’s important for me to be known somehow. Blake pointed out that it is essential for a church to keep these older

individuals strongly connected to the church, not only in the sense of caring for them but also in the sense of their role in serving and funding in the ministry.

A final role Blake shared is that of champion of the new leadership team and of the continuing vision of the church. This is done not only by visible, genuine support of the new team but affirmation that the older members of the congregation are still needed in this “next evolution of the church and what it looks like as it continues to progress and to grow and to change. That I am not only still wanted but needed.”

Volatile Situations the Successor Inherited

Blake identified three volatile situations that resulted in an erosion of trust among staff, elders and the congregation. The first was the inheritance of two difficult staff situations: the prior staff director and the new staff director. These have been mentioned in prior interviews. Blake believed that James should not have inherited these situations. The prior staff director’s performance had been in question for some time prior to James’ arrival and the new staff director was being hired as the mantle was being handed to him by Reagan. When those two individuals had to leave the staff, the transition came sharply into focus for the church. “This is the first time in history that we felt this kind of a significant loss of senior leadership or the fact that we made a mistake.” These decisions created distrust among the staff and a sense of fear and insecurity that more changes were on the way, changes that would not have previously been envisioned.

The second situation was that of two ministries that were not “real healthy.” One of these ministries had been led by a dynamic young leader who left for another ministry. The ministry floundered in the absence of a strong leader. “It didn’t have that dynamic that had been there for a period of years. And there was a sense of loss in all of that and

that we're stuck right here." A second ministry was the student ministry. This ministry had historically been a strength of the church and was a primary attraction force for the church. The leader of that ministry wanted another role at Community Church but was denied that opportunity. His departure and a subsequent hire that did not work, "was like taking something that was running at warp speed and putting the brakes on big time. And there was a sense of loss over that." The new leader left under a cloud because he did some things that were "ill-advised and inappropriate." Another hire was made that once again did not work out resulting in continued deterioration.

And so here you have all these parents who are going, "Man, we've had all these wonderful experiences and now this is the pits. And what are you going to do about it?" And kind of being stuck. "Who is the next guy and how is that going to happen?" And not bringing resolution to that as quickly as we had hoped.

These two ministries, that were so strong in the past, now in the present were areas of weakness. Blake said that individuals most concerned about the ministries needed to hold someone responsible and so James was blamed for these situations that he had inherited.

A third volatile situation took place within James' first full year as directional leader. This was the opportunity to sell the property. The opportunity came up suddenly. The nature of the sale required the strictest confidentiality. Historically when significant changes were going to be made, town meetings were held with the congregation to provide conversational opportunities and the exchange of ideas. The congregation sensed that although the church was governed by a board of elders, these elders were listening to their concerns and input. Blake cited one time in which nine changes were proposed. The elders conducted a congregational-wide study with an eighty-five question survey. Eight of the issues indicated ninety-two percent support or above. One of the proposals

received seventy-five percent support and as a result the elders decided to set that one aside. This decision gave the congregation the sense that, “the leaders listen; they hear us in all this.” Blake said that a lot of “trust capital” was gained in that process.

With the sale of the property the elders took the decision under consideration for two months. The shepherding board was invited to join the oversight board to make a combined group of forty-five individuals. There was unanimity: the property should be sold. And then the leadership including James, informed the church that they had sold the church, this without any of the town meetings. It was a “huge trust crusher—buster. For the church that had experienced one level of communication and involvement to something that was so starkly different from that.”

These three volatile situations in the context of a transition led to what Blake described as a “perfect storm.” It was an extraordinarily challenging time for the successor even though “he’s got the support of the previous leadership and he’s got an elder board with continuity.” It was a time that he potentially may not have survived.

Blake believed that much trust remains to be regained. A portion of the congregation was enthusiastic about all the changes. Blake said that their research showed though that eighty percent of people are settlers and twenty percent are pioneers. Some of the biggest challenges they have had have been from the people who are settlers. “They wouldn’t think a move would be good . . . even if we found out that an atomic bomb was going to be dropped on this thing tomorrow.”

Trust, in Blake’s opinion, comes from humility on the part of the staff and leadership. James and the elders have acknowledged that they wished they could have done things differently and that they had made mistakes. They asked for forgiveness for

their mistakes and for patience through the process. Blake believed though that because their facility issues are so significant that one of the turning points is going to be the move to the new facility.

That new campus is not going to change anyone's life spiritually but it's going to lower a number of barriers to community and to ministry and so I think when they see the wisdom of that move . . . initially people were kind of going, "Yeah, let's see if you can raise that much money . . . I'm not giving to it." Right now we have two-thirds of the money raised.

I think when they see the wisdom of the move . . . as opposed to complaining how bad everything is . . . I don't mean they're all complaining or unspiritual but they're kind of in that journey right now where it feels hard, I think that's going to be a big win for them.

I also think that they're in the process of seeing a new team come to fruition.

Blake said that there was the loss of two of the primary speakers but now there is a new communicator who is exceptional. Other leaders are taking hold. The student ministries are now led by a dynamic leader.

I think that now they're beginning to feel momentum and difference and holes being not just plugged but ministries being and some things from the future and there's this sense of expectation again about the future. When we say, "I think the best days of Community Church are in front of them, people are beginning to believe that again and look forward to being a part of that as opposed to trying to hold on to the past somehow.

So I think there are a number of factors that are starting to come together, have over the last year, and are beginning to and over the next year it will . . . help us make that change and complete that process. But I think we're still in the middle of it.

Blake shared that the Sunday just prior to the interview, James gave a message called, "The First Day of the Next Thirty Years." Blake gave his own reflections on the next chapter for Community Church:

The first day of the next thirty years I think it's going to be harder for them than it was for us. Some people think a church start-up is hard and there are aspects of it that are.

But I think being with a group of people who have experienced great success for a period of time and yet stay hungry—it's like . . . the guys who win the Super Bowl. They hardly ever win it again because the hunger factor is not there at the level it takes in order to succeed like that.

I think when you first begin with that church plant and it starts to get up and running and people are coming saying, "I haven't experienced God like this and this is fantastic and I want to be an integral part of that and I'm willing to sacrifice for it."

And then they experience that for ten or fifteen years or whatever. Now you're fifty but it's still time for us to step up . . . and do that some more and they go, "Am I really at that same level of hunger and desire that I was when it was new to me?"

That's why I think the Calebs of scripture are so rare. It's really hard for that next generation too. So I think the next thirty years are really harder for a church like ours than the first thirty . . .

You see it in the book of Judges, where you see that generation that took the land and the next generation who got a little bit satisfied with themselves and so you enter into this period of the Judges and then it says at the end of Judges 2, "There arose a generation that didn't know God or the things he had done." And you go, how did that happen so quickly?

Final Thoughts

Blake believed that the traditional approach to transition is that of simply trying to replace a leader. His observation is that this approach is woefully inadequate. Churches struggle for three to five years and then find a leader, sometimes who is a good match and sometimes who is not.

To use the football analogy, the coach that comes in after the real successful coach usually doesn't make it. He's usually the interim and then somebody else comes in after that when people finally get hungry enough again in a sense and recognize how perilous and fragile their situation is as opposed to, "Oh yeah. We're a big church. We're going to do good and we've got this long history."

James said Sunday, we've talked a lot about it, "The church is so fragile, so dependent on the Spirit of God and his grace and humble people leading it.

The minute you think you've got things wired and stuff . . . you're in big trouble.

CHAPTER 5

NARRATIVES OF TRANSITION: COVENANT CHURCH

Covenant Church Background

Covenant Church was founded forty-five years ago in the basement of a house in a major metropolitan city. After the “church planter,” the first pastor, resigned, the church was without pastoral leadership for about one year. The church identified several experienced, skilled candidates, but after receiving offers from Covenant Church, these candidates declined. This caused a shift in the recruitment strategy towards seeking a young pastor who would grow in experience and skills as the church grew. Forty-one years ago they invited Gage Miller to become their pastor. The church consisted of about 120 people and although they were still meeting in the basement of a house their first building was under construction.

The church grew steadily through the forty years of Gage’s leadership. There were three periods of explosive growth, each connected to relocation to a larger site. Covenant Church is one of the largest churches in the country, one of the “super-mega” churches (churches over 10,000 in weekly attendance).

Gage Miller—The Predecessor

Gage was a recent college graduate and inexperienced when invited to become the pastor of the four-year old church. He shared that he made many mistakes but one of the things that he did right was to focus on his strengths (which he cited as preaching and

teaching). He believed that his leadership came out of the credibility gained from preaching and from his strong work ethic.

First Thoughts of Transition

Gage said that it was hard to pinpoint when he first began to think about transition. Two occurrences were largely responsible for initiating conversation. The first was that in the most recent relocation, Covenant Church secured a loan well in excess of twenty million dollars. The bank insisted that Covenant Church purchase a key person life insurance policy for fifty percent of the loan value—well over ten million dollars. Gage joked, “I’m afraid to walk across the street. My elders would say, ‘You want to take a hit for Jesus?’” The financial exposure was sobering and brought greater clarity to their belief that “this can’t be a one-man show.”

This has got to be built of Jesus Christ and not on a person.

And then as we got larger people in the community would say, “What’s going to happen when Gage Miller dies or Gage Miller leaves? What is going to happen? It’s just a personality cult.”

I think that forced our elders to say, “Let’s make sure this is not a personality cult.”

At that point we said, “Let’s bring in a young man to preach to give Gage some relief in the pulpit and to make sure this is not built on a person. This is built of Christ.”

So we started out with saying, “Let’s share the pulpit.”

At that point, eighteen years prior to this interview, they brought in Don Steel (who eventually became the successor). Don was not brought in as a potential successor but rather he was brought in as a “younger generation preacher” to preach six times in the first year. Each year that he stayed, he would receive an additional opportunity to preach.

The second occurrence that spurred conversation about transition was about twelve or thirteen years after the decision to hire Don. Gage read the book, *Too Great a Temptation*, by Joel Gregory that chronicled Gregory's disastrous attempt to succeed W. A. Criswell at First Baptist Church in Dallas. Criswell had served as the Senior Pastor of the Church for fifty years. Criswell hand-picked his successor, Gregory, but once Gregory was on site, Criswell refused to retire. Criswell insisted that everything and everyone, including Gregory, operate according to his dictates. He was open in his criticism of Gregory. In less than two years Gregory resigned. Gage shared that the book "really convicted" him.

I said, "I can't do that."

You can't be the preacher at your church without thinking, "What happens when I'm finished here?" Because there are some people who—you know—they're—they get too focused on you and you begin to look long term and say, "God's entrusted me with something really special here. I got to make sure that this continues."

So that book, plus getting older made me think seriously about transition.

Also, I think it's in *Built to Last*, that Jim Collins talks about the importance of transitioning primarily from within the culture. So I had all our elders read the book, *Too Great a Temptation*.

I think that initiated the conversation about transition.

Gage was fifty-eight years old at this time. Following discussion of the book, the elder board asked Gage to develop a transition plan over his summer break. This was the initiation of formal conversation regarding transition.

The Preliminary Transition Plan Developed by Gage

First, Don Steel would be designated as Gage's successor. The congregation had responded well to his preaching in the thirteen years that he had been on staff and was

“loved by the church.” The leadership was also aware that Don was seriously considering offers from other churches. This designation as successor would indicate Covenant’s commitment to Don and also indicate that the church did not expect him to permanently remain as an associate pastor. Gage digressed at this point in the interview.

I think every church has to fashion its own plan. There’s no model out there that I’m aware of and we weren’t trying to be a model for somebody. I’ve had people come in and say, “Man, you guys have modeled it.” Some like it and some don’t but it was not our intent.

We were just saying, “This fashioned for our situation because our situation—every situation is different.”

Second, Don would continue to receive an additional weekend each year for preaching.

Third, Gage would step down from his responsibilities somewhere between 2006 and 2008. Gage offered commentary on this timeline.

Let me tell you why I picked those dates and why I narrowed in . . . I saw that in 2006 our preaching was going to be almost fifty-fifty. And I said, “I think it would be wise—I think I need to lead, but there comes a point, if I’m going to be the leader, I need to be in the pulpit the most times.” I don’t think that’s selfish. I just think it’s realistic.

The second thing is that I looked and said, “I will celebrate my fortieth anniversary at this church in June of 2006. That would be a—the children of Israel put up with Moses for forty years. Forty years is long enough for them to put up with me.” So I kind of narrowed in on the 2006 date.

I would be almost sixty-three years old and it would then give me another chapter of my life where I could do some things.

I did not retire to fish and play golf. I wanted to have this energy and the opportunity to be—I . . . wanted to be free from the pressure of the daily church that you live under every day . . . I’ve had some people ask, “Well why would you retire at a younger age, 63?” I’ve not had one preacher ask me that question.

Fourth, the church would hire a third member of the preaching team one generation younger than Don with whom Don could share the pulpit when Gage stepped aside. Gage believed that Don did not want to go from speaking twenty-four weekends a year to forty-eight weekends a year. Also the congregation had grown to appreciate the team teaching model, that of “being fed by different chefs.” This led to the hiring of Karl, a younger communicator about three years prior to this interview. Gage said that Karl “is the best I’ve ever seen.” The relationship between Don and Karl is very positive. Karl’s arrival meant that Gage and Don had to give up some weekends for preaching so that Karl would have the opportunity initially to speak ten weekends a year.

Fifth, Gage would bring his responsibilities to closure and then not be back at Covenant for at least a year. He described his rationale for this recommendation.

I know a lot of guys who say, “I’m going to be the seniors’ pastor.” “I’m going to be the cheerleader on the sidelines.” That thing with *Too Great a Temptation* plus my observation [is that] ninety-eight percent of the time it’s better for the preacher to get out. It’s harder.

But if you ask the senior pastor, “Do you like having the old guy here?” “Oh I just love having him here. He’s such a support.” But if you get down deep with the guy, you know, most times they say, “It makes it a little tougher for him being there.”

And especially a guy that’s been there forty years. And it’s better for me too because my year has been up and I’ve gone back two or three times but if I’d been there at first every change that was made, I’d felt like a spotlight was right there and people reading my reaction. They’re going to come to me. They’re going to say, “Do you like that song?” “Do you like that carpet?” Do you like that new program?” Now how can I worship if I’m under that kind of scrutiny?

So I said, “I’m better off going elsewhere . . . my original plan was to leave town and for the church that would have been better,” but (joking), “I’d had to go as a divorced man. We’ve got seven grandchildren here.

(After the plan was implemented Gage did stay out of the church and also stayed out of church issues.)

Sixth, the elders would adjust Don's pay to be equivalent to Gage's at the end of three or four years.

Challenges of the Transition

Late summer, 2005, Gage defined his ending date as June, 2006. He began to think about what his last six months would be like and realized that he was going to be a "lame duck—everybody's sitting around waiting for me to leave." He realized as well that he would not want to make ministry changes that others in turn would have to sustain. In November, he surprised the elders by telling them that on January 1st, he wanted to "turn the reins" over to Don. He would still keep his ending date in June. He would be present and he would preach. The congregation would not experience much difference but Don would be the Senior Pastor. He shared this idea with the elders.

Well, all the older guys have been around a long time said, "I don't think that's a good idea Gage . . . you need to stay on."

The younger guys said, "Gage, you're a lame duck already."

So that answered the question for me. And I said, "That illustrates exactly the issue and it's time for me to make this decision."

The idea was accepted, shared with the staff and congregation and then implemented January 1st.

Being in the Office but Not in Charge

Gage found being in the office but not in charge much more difficult than he had anticipated. He cited the example of Easter Sunday. There were multiple services

scheduled, one at 2:00 p.m. with Gage scheduled to speak at this service. He did not like the time of day. He did not think a service at that time was a good time for a service. Someone came to him and asked how they were supposed to secure volunteers for a service at 2:00 in the afternoon.

I said, “I don’t know. I don’t agree with that. That’s Don Steel’s idea. Go talk to him.” And then I realized I had just done what I had asked people not to do for forty years . . . once you’re in a meeting you be supportive of that which is—and so I had to go to that and apologize. I had to go to Don Steel and tell him what I did and say, “I’m sorry,” but I still didn’t think it was a good idea.

But that’s an illustration of why once you’re in leadership and in charge, it’s difficult to step aside and stay on.

Differences between Gage and Don

Gage described Don as being a people person. “He loves being with people.” Gage is more energized by study and seclusion. Gage is more private and programmed. Don is more spontaneous and possessed an extraordinary ability to get people to laugh. Don is more of a “convention kind of speaker” who creates excitement, laughter and tears. Gage is more about teaching, learning and introspection.

When Don was identified as the successor, a number in the congregation felt that Dave was too young, spontaneous and light (in terms of his sense of humor). They did not see the more reflective side of him and could not observe his capabilities to lead the staff. The more he preached, the greater the confidence of the congregation. However, one potentially negative factor that Gage identified about selecting an insider as the successor is that there is very little of a “honeymoon period.” If Don had been invited from the outside he would have been regarded as an extraordinary person and his flaws

initially overlooked. Over time the “honeymoon period” would have ended as reality set in.

Length of the Transition

It was five years from the time that the elders identified Don as the successor to the time that Gage actually left. Gage admitted that this is far too long of a transition period.

I think we pulled it off mostly cause Don Steel is a wonderful person and was willing to take a secondary role. But by the time he took over, I mean, he was chomping at the bit. I think we both were good friends but we both feel like five years was too long.

Gage said that if the leadership team had not offered the position to Don when they did, Don would have left the church for another opportunity.

Allowing Don to Inherit Some Problems

Gage felt that in his last year he started to be too “compliant.” By that he meant that he was not as direct in dealing with staff performance issues as he normally was.

I think I got too soft towards the end on those issues that I’d battled. I quit battling them. There were one or two staff issues that merited stronger disciplinary action than I took.

And it’s hard when you say, “I’m going to be out of here in six months. I don’t know if I want to deal with this or not. Maybe it will get better . . . It doesn’t get better . . . whenever you have what seems to be a serious problem ninety percent of the time it’s a whole lot worse than it appears on the surface . . . I knew that of one particular issue but instead of reacting, “This is worse than I think. I hope it’s better than I think.” It turned out to be worse than I thought. . . .

He continued:

It’s not the business world . . . you have to weigh harmony in the church in making the decision far beyond what you do in business and sometimes you have no other recourse but to let somebody go but boy when you do

that and you're the guy that has to deal with it . . . this is why ministry is so tough . . . you cannot lash back at those people . . . Christians are terrible at confronting and by the time they do confront, they lash out and say some of the nastiest things that really are hurtful. And you've got to take the high road and it's just really, really—tough.

[It doesn't feel worth the energy]. And that's the way I felt. I had just gone through someone who needed to be let go . . . and she sued us. And I felt like the Lord was just stirring up my nest, saying this is why [it's time for me to step down].

One of the biggest adjustments for me in ministry was to understand the staff people became my ministry. I thought they were here to help me, to free me up to do the work of the ministry to be with people. All the sudden they became more of a problem. Ninety percent of my problems became staff problems. And I resented that. That's the natural result of being a mega church. When you got a staff with three hundred people if one tenth of them give you problems, you got a lot of problems.

I wish I had been stronger with staff than I was towards the end.

Things Done Well in the Transition

Communication was the first area that Gage believed was done well. The transition was spoken of in special announcements publicly; when appropriate, it was spoken of in sermons (one sermon cited was a series from the life of King David in which David blessed his successor); and the communication plan was well executed. Gage said that they had thought things through thoroughly, the transition unfolded almost exactly as the leadership had communicated, and the result was a high degree of trust.

Second, Gage said that also relationships on staff and the leadership were maintained in a very positive manner. "The people saw that we were friends and there was no blood on the floor—I'm so thankful for that—that I left with no blood on the floor—no hard feelings." He later commented that transitions often are not navigated very effectively and predecessors in particular end up deeply wounded.

Third, Gage also said that the congregation was given the assurance that the ministry did not center around him. “We did well in not making it melodramatic.”

I had a woman in the church who said, “You know people used to ask me all the time. “Well, what’s going to happen to that church when Gage dies? What’s going to happen?” Now I just say, “We’ll bury the dude and go on.”

And I think that was something that was healthy for the congregation—that they realized that we had thought through this issue—there was a sense of assurance in knowing that the whole thing didn’t center around me.”

At his final service on staff Gage passed a baton to Don. The baton had been their symbol through the final year of transition.

Fourth, they identified seven steps in passing a baton that parallel a transition to aid in communication of the transition:

- Both runners have to be in the same lane, going the same direction, having similar goals;
- There’s a designated area where the baton is passed. The transition is the most crucial period but everyone knows where the starting line and the end is;
- The one passing the baton has to keep going full steam until the end . . . there’s a tendency to let up towards the end . . . Gage said he put the same effort into it at the end;
- The one receiving the baton has to start running before the other predecessor arrives—he has to have experience in leadership;
- A step should be gained in the race because one’s reaching out and the other’s reaching back so if it’s done well you gain a step, you don’t lose;
- There has to be a clean release of the baton by the predecessor;

- The one releasing the baton goes to the finish line and cheers for the one who has received it.

Fifth, the leadership evaluated Don's strengths and weaknesses and prepared him for his eventual role by giving increasing leadership responsibilities over the five-year period.

They made him an elder . . . he was involved in the building committee. He was involved in the leadership development plan and he gained respect and did those things really well during that period.

He will tell you that it was still a shock when he sat in that senior minister's chair and all the sudden the responsibilities are on your shoulders and the criticisms that come your way and the things that you know.

The associate—you can say you know, but until you're sitting in that chair, you don't know. But I think he was well prepared, well prepared for it.

Sixth, Gage released his authority and ambiguity was minimized in terms of Gage's and Don's roles. Gage sought to diffuse the confusion as to who staff should go to in terms of a decision. Particularly in the last year, Gage would defer to Don.

I would say to Don, "This hire is going to be a lot more important to you in the long term than me. I think you ought to head up this hire . . . or you need to decide this or this person needs to report to you."

There wasn't a whole lot of that but I think that's one of the things that I did right. I was able to release . . .

You asked me if there was any ambiguity about it. "No."
Has there been any ambiguity since I left. "No."

Seventh, the church celebrated Gage's ministry "really well." It seem long and drawn out to Gage at first as they held five different celebrations in the last month rather than having one long, drawn out service:

- There was a service for those with the longest history, those who were in the first building. They reminisced about the early days;
- There was a service for Gage's wife with tribute paid to her;
- The church leadership held a "roast" for Gage;
- One celebration was invitation for the metropolitan community leaders including the mayor and other officials;
- Then there was a final service with the congregation, a service of normal length.

Gage said that through all this he was treated very respectfully and honored versus the experience of several friends of his who felt pushed out, rejected and summarily dismissed. One friend came back from vacation and his elders told him that they found his successor. This successor was going to start in four weeks. His friend was devastated.

If the congregation knew what had happened, there would've been uprising. He took the high road and he swallowed it and tried to go out with as much class as he could but he went out with his tail between his legs . . . it really wounded him.

And then the other part of the piece is that the people in the congregation over a period of time begin to hear rumors to the effect so they get angry at the elders and there's unrest.

Eight, the elders insured that Gage would not have financial needs in the future. They chose to match the gap between his retirement income and his current salary. "We're going to make up the dark space so that you don't have to cut back on anything . . . and this is not just for you. If you die, we'll continue it for your wife until she dies."

The leadership wanted to honor Gage's long-term leadership in the church so that no one could question whether or not they treated him right.

The Personal Side of Transition

Gage reflected on his own journey towards transition. Fifteen years prior to his retirement, Gage approached the elders about the possibility of a sabbatical. He requested four months off. Due to various factors in the ministry, the elders declined his request but then suggested that each year he take two extra weeks as a study break at the end of his three-week vacation each summer. Gage said that this additional break became a crucial part of his long term survival in ministry.

The Drain of Being the Senior Pastor in a Megachurch

Gage's reported his weariness of dealing with staff issues. A large staff means a lot of people management. He found the magnitude of staff issues to be quite draining. He also spoke of the difficulty over time of dealing with a small percentage of people in the congregation. He spoke about Jesus taking time apart from the crowds.

If we minister to people . . . it drains you. It does me . . . you can't be in a large church . . . without being drained.

I had a recurring dream . . . it took different forms but it always had the same basic thrust. I was supposed to be somewhere to speak and I was late and I couldn't get there. Either I was lost and along the way people were stopping me to talk to me and on top of that I had no idea what I was going to say when I got there.

That's a nightmare—that's a preacher's nightmare. It [wouldn't] take a dream analyst to determine why you would dream that. That's the pressure of ministry.

Gage spoke of the long-term effects of dealing with the constant pressure.

I mean I would hang on the last two or three weeks (before vacation) and say, "I can hang on another two or three," and look forward to that. And I'd walk out of there sometimes (saying), "I'm not sure I want to come back."

I want you to know this is the greatest situation I've ever seen in the world and this is a wonderful church. I'd say ninety-five percent of our church is great. Five percent is not so hot and one percent is nasty.

My problem as a leader is fifty percent of my time I'm focused on that five percent and I lost the big picture.

So when I'd leave [for summer break], I'd say, "I don't care if I ever come back. And the first week wouldn't do anything. The second week I'd go to the bookstore and I'd get some books. Then the third week I'd start reading. The fourth week I was preparing for my sermon and the fifth week, I'm chomping at the bit to come back. And I'd come back after five or six weeks and it was like a revival. I'm renewed but I couldn't get that in a week.

But the way I felt the last two weeks before my summer break is about the way I felt the last year in my ministry.

The Desire to Finish Strong

Gage felt that even though he struggled with the long-term wear of his role in his last year in ministry, he believes that he "finished strong." He attributes this largely to knowing "where the finish line was."

I'll tell you what I wanted to avoid. I wanted to avoid a period of my life when I came to my friends and I said, "Do you think I'm losing it? Do you think I ought to retire? How much longer do you think I ought to go? And my friends are put on the spot.

Listen, by the time your friends tell you, it's too late.

And by the time you know it, it's doubly too late.

So I say, "You know what? I'm going to avoid that. I don't want to put my friends on the spot or put the elders on the spot."

And so the advantage of having that termination point was I could finish strong.

I think if you could ask people, "Was Gage slipping towards the end? Most of the time, they're going to say, 'No.'"

Preparing for the Change After Being the Senior Leader

Gage acknowledged that stepping down from the visibility and influence of leading such a large ministry and entering retirement is a big change. He believed that three factors assisted him in preparing for the change.

The first was that he laid out a series of projects and lined up areas of involvement. These included making teaching videos, writing articles, speaking almost every weekend in various churches, and serving on boards. “I knew that I was going to have plenty to do. I wasn’t going to wake up and say, “What in the world am I going to do today?”

The second thing that Gage did was talk with individuals who had gone through this life transition. A number of them told him various feelings that he would experience.

But I’ve got to say, I never—I have not felt a sense of loss. I don’t think it’s my makeup to love to have to tell people what to do and so I think leading up to that gradually was happy for me . . .

I talked to some guys who had been through it in the business world. Some of them talked about—you go through a period of withdrawal but it’s because they didn’t have that next piece out there.

A third factor that Gage mentioned was his own beliefs about church and ministry.

I heard somebody say one time, “It’s not as hard to release something if you knew it didn’t belong to you in the first place.

I think the constant reminder that the church wasn’t mine.

Nobody was more overwhelmed at what happened at Covenant Church than me. It happened pretty early on, that I realized, ‘This God is doing something here that is beyond me and it is of God.’”

I don’t need to spiritualize the whole thing but I mean that’s absolutely true. God can continue to use other people to do the same thing.

Finding a Church Community to Call Home

Gage was open regarding the difficulty of the senior pastor remaining in the church after retirement. He does believe that everyone needs a church. He acknowledged feeling a spiritual void in his life over the past year. He concluded that what was missing was an identity with a church.

I've seen people who are dedicated leaders in parachurch organizations shrivel up over a period of time because the parachurch organization becomes their church. But Christ didn't die for ___(name of a parachurch organization)__. He died for the church and the church is where the permanency and the stability is. . .

I need a church. I don't need to be just out speaking every weekend or I think I'll shrivel up and die . . . I think I need to be involved somewhere and I haven't fully made that decision yet.

Comments on the Successor

Gage believed that Don has done “extremely well” in assuming his role. Don has proven very effective in meeting people, honoring Gage, and not undermining him. He has done well in leading and communicating with the staff, sharing the pulpit with Karl; he has endured “the blows of criticism and kept his head above water when some would have drowned under it;” he has mixed well in the community and fostered very positive relationships with the media. Finally, he has modeled “what a family should be; he's been an excellent father and husband.”

Gage's Counsel to Others Anticipating Transition

Gage offered several final summary thoughts to those anticipating transition:

- Fashion your own plan. You can learn from other people but you've got to plow your own ground in a sense 'cause every situation is different;

- Probably the thing that helped me the most was to have that target date out there years in advance and make an unemotional decision of when it's going to be;
- Finish strong;
- Have areas of contribution out there that we're going to look forward to as a final chapter of our life. The guys I know that retired to fish and play golf shrivel up and die.

Final Thoughts

Again Gage reflected on the enormous release he felt from pressure and the wearing effects of leading a large ministry.

I do enjoy not having pressure. You know when (the Apostle) Paul listed all of the struggles that he went through—shipwreck, beaten—I think the last thing he says, “In addition to this there was the daily pressure of all the churches.” And there is—that you live under this pressure of feeling responsible for this thing.

Somebody said to me, “You don't know how much pressure you got, until you get out from underneath it.”

It's nice to be out from underneath that daily pressure.

Don—the Successor

From early childhood, Don knew Gage. Don's father came and preached at Covenant Church. Occasionally Don came with his dad and stayed with Gage's family. Gage's wife babysat Don when he was a pre-school-age child. Gage and his wife were in college at the time. There was a close relationship between Gage and Don that was established very early on. Their connection continued as Don became a pastor to students at another church within the metropolitan area. Gage, though pastoring a large church, came and spoke at some of the youth retreats led by Don. Gage was on the board

of the Christian college that Don attended and where he was eventually employed. In time Gage's son came to work for Don. Clearly there were many personal connections. Don is eighteen years younger than Gage.

Don reports that Gage had expressed interest in his joining the Covenant Church staff at some point. In 1989, Gage invited Don to preach on a Sunday morning. Don did so. He was twenty-seven years old at the time. Gage explained that he wanted to expose the congregation to some younger preachers. One month after his visit, Covenant Church's elders began to talk about their concerns of the church being built around one person. Gage at the time was preaching forty-eight weekends of the year. The conversation began when Gage expressed the need for someone to do preaching with him. He spoke of the vulnerability of having just one preacher. Team-teaching was unheard of at this time but Gage approached Don about joining the Covenant Church staff as the college pastor. Preaching eight to ten times a year was a part of Don's responsibilities.

Don spoke with admiration of Gage's attitude in this change:

What's unique about this is, most preachers when their church is growing and getting larger—at that time the church ran about 3500—most preachers say, “This is growing because of me. I need to be up front more.”

Gage's attitude was, “This is growing. This is of God. This is dangerous. I need to be up front less and our people need to learn that they can learn from more than one mouthpiece,” because the weeks he would preach the attendance would drop a thousand.

And so when I came, I was a college age minister and I preached ten weekends a year . . . and we made it real clear that we were going to put it in the bulletin two to three weeks out who was preaching for the coming weeks so everybody would know.

And so, my first year, the attendance would drop six hundred people, a thousand people the first few times—that will hurt a lot of churches—but we stuck with it. It got to the point where it didn't change and then years later when we even hired a third person. It got to the point where it didn't change with him and people don't care who is preaching.

You know they are going to come but that's how I ended up coming here and I share that because it's a real tribute to Bob because it shows the level of humility he's had through the whole process. . .

There was a time when we had the only trans-generational preaching team that I knew of. Gage was sixty-two, I was forty-four and Karl was twenty-nine.

Transition

The first time Don remembers anyone verbalizing the idea of transition was in 1993. Covenant Church had purchased property on which the church sits today. The church offered public forums for communication with the church leadership. There were some significant concerns within the community regarding this enormous facility that was in the planning stages for the property. Don and one of the elders were the church representatives in the meeting. Don was thirty-three years old at the time.

This lady stands up and says, “Well you know what? That church is all built on Gage Miller. What are you going to do if something happens to Gage Miller . . . you'll have this big building and nobody in it.

And the chairman of our relocation project, one of our elders, stood up and said, “Ma'am, he's a real strong leader.” But he was just really calm and cool and said, “Ma'am, you see that dude right there (pointing to Don). We'll bury the guy (Gage). The next week he'll (Don) start preaching and life will go on.”

I felt all these eyes looking at me but that was the first time they ever heard a person express what I really felt like was taking place.

The First Formal Conversations

About two years after the informal statement in the community meeting (nine years prior to the interview) the elders asked Gage to come up with a transition plan. Following the development of the plan, Gage announced that he would retire six to ten years from that point (fall, 1998) and that the elders were united that Don was being groomed for the position of senior pastor. There was no need to look elsewhere.

That is a really long runway.

It's got some good things but it's got some bad things.
So basically, you know, I waited seventeen years from when I came, never dreaming I'd be the senior pastor and of course at that time the church was running 3500.

The Positive Aspects of a Long Transition

The long transition takes “the guessing game out,” so that people know what is happening and have time to feel comfortable with the change. It gave Don the chance to “ramp up” in many different leadership areas so it was a gradual passing of the baton. Don became familiar with many different ministries in the church and got to know a significant number of staff. His visibility increased over time as he preached an increasing number of Sundays and became the church's media spokesperson. The diverse roles provided the opportunity for Don to prove himself capable and trustworthy.

The Negative Aspects of a Long Transition

Don used the metaphor of passing the baton to describe the overall sense of his experience.

You are kind of in-between third and fourth gear for a really long stretch.
And you want to respect the senior leader cause you're not the senior

leader. That's not been handed to you yet. But you also want to put your imprint and your mark upon the church for different things.

I'd say the toughest time for me was the last year of that transition . . . nine months before it was officially mine. Gage did a great job of trying to circumvent that by surprising the congregation and when he said, "My last Sunday will be at the end of June," sort of what I was expecting, he said that like a year early.

What they didn't know was that he was going to stand up the first week of January and say, "I don't want to be a lame duck . . . this is the one part of this transitional plan that I've never had peace with and so as of this moment Don Steel is your new senior minister."

Then I came up and I preached on my vision for the future of the church. And Gage said, "I will continue to do my preaching but Don will run meetings. Don will lead throughout. I won't be at those meetings and he will run all those things from this day forward. He's your leader."

That really helped me.

Don said that he was "chomping at the bit," during the year before because he felt like he was ready to assume the role and felt very prepared for the role. He now acknowledges that you can't realize the weight and complexity of the role until he was placed into that position.

A second negative was the ambiguity in terms of leadership and decision-making:

The year before he left, there would be times where I could sense the leadership team looking my direction more so than Gage's. And because of Gage's wisdom and discernment, a lot of times Gage would pick up on that and say, "You know what? This probably needs to be a decision that Don makes because it's going to have lot more implications a year from now, two years from now than it does for me.

Fortunately I had a guy who was willing to do that. There's a lot of guys that hold on tightly and then you have to pry their fingers off when they get done. And you have to remind them, "Hey, I thought you were leaving."

I've got so many stories from friends that went to a church 'cause the guy said he'd be leaving within one to two years and three and a half years

later they're still the associate and the guy thinks he has still got another couple of good years in him.

Don recognizes that Gage had some “good years left in him but he also knew that these were prime years for me.” Gage willingly stepped down from his responsibilities sooner than he would have needed. Gage, in hearing of the challenging situations that Don is dealing with which he had to put up with for forty years, says, “I’m glad it’s you and not me. I don’t miss that. I don’t miss that pressure. I don’t miss that scrutiny. I don’t miss those staff problems. I don’t miss that one bit.”

Challenges in the Transition

The challenges mentioned were dealt with over the last several years leading up to Gage’s retirement and then in the eighteen months following leading up to the time of the interview.

Absence of Trust in Don in His New Role

The first challenge that Don mentioned was one that surprised him. He served on staff for seventeen years before becoming Senior Pastor. He was “loved by the church.” No questions were asked as to whether or not he was the person for the job and yet he was surprised that a percentage of those who had been at the church for an extended number of years did not give him the “benefit of the doubt or didn’t trust positive intentions.”

They kind of felt like, “Okay Dad’s gone and now the youngest son has the keys.” . . . or “Oh he is going to do this? Is he going to do that? This is a slippery slope. You now once you start this, then all of the sudden, you know” . . .

And you just have to ride it out and that's been a tough thing for me but in the midst of that, there's a whole lot of people who really get it and that's what you hold on to.

The most benign or generic thing can somehow be interpreted as, "Well, you know, they don't care about us anymore." You know we have not made drastic moves in any direction, but even the slightest moves get interpreted as being a departure from how it used to be.

Again, it's not all the older people. It's a small segment of them. But as you mentioned earlier, you get a small segment of a church running _____ thousand people . . . it's a lot.

And in their defense, if they were seventy years old and they'd been here for ten years, fifteen years, twenty years, the person that they were naturally going to relate to the most was the person who was closest in age to them, he was sixty-two and now all the sudden, I'm the age of their youngest son and I'm steering this ship. And they have some questions on where I'm going to steer it.

Several times Don mentioned how shocked he was at the reaction of older people because he believed that he had a great relationship with them. "They loved me and it's just weird when I'm the guy behind the wheel that everything gets magnified." He actually called what unfolded in his first eighteen months as the "perfect storm." At the end of his first eighteen months as senior pastor he held a fireside chat with the older part of the congregation. He spoke candidly as to how difficult a year it had been and said, "You're not going to be pleased with every decision but I hope you'll be supportive." His words were well received but acknowledged that there were probably some additional things he could have done even several years in advance of the final transition to anticipate the concerns about change that existed.

Changes in Staff Structure

One month before the interview, Don reorganized the staff. Gage was more comfortable in working through a senior administrator in terms of ministry oversight.

Gage would come back and ask whether different issues had been followed up. His style was a bit more directive. Don, Gage and the senior administrator would meet to discuss issues. The next level down had a group of ten individuals. This group had grown to this size and gotten ineffective in terms of meeting utilization. Both Gage and Don grew weary of this larger setting with a total of 13 in attendance as various issues of management were discussed that often had no bearing on the majority of those in attendance.

Don decided to form a vision team of five individuals, believing that more staff ownership at the top was essential for leadership in the future. He hopes to create a round-table type environment. He removed five individuals from the group of ten mentioned above. The conversations required to make these changes were difficult. In spite of significant roles being promised, the five individuals removed felt demoted. Their pay remained the same and yet there was this sense of a loss of standing and influence. Don believed that several of them will really struggle to stay in their new roles.

Change in Elder Term and Service

Don felt that one of the wisest things he ever did was eight years ago, after the transition was made public, he formed a leadership development committee. Another individual chaired the committee. The sole purpose of the committee was leadership development. This involved recruitment of individuals with leadership capacity and then offering opportunities to gain experience. The hope was that eventually a number of these individuals would become elders. One of the first decisions of the committee was to establish mandatory rotation for both the deacons and the elders. The church had gone through its entire history without any rotation. Some elders had served for many years.

The average age had increased from the late thirties to the early fifties. There was resistance to considering leaders under age forty with the claim that experience was needed, this despite the fact that many of these elders had joined the board in their early thirties. The size of the board had also increased to twenty-six at one point. At the formation of the committee the elder board consisted of twenty-one individuals.

The recommendation was brought to the elders and experienced a high level of resistance. A compromise was struck such that the mandatory rotation would begin the following year with the deacons. Six-year terms were established with one-sixth of all the deacons rotating off each year. The plan would be implemented with the elders two years from the decision point. There was approval because the action seemed far enough out into the future. However, the closer they drew to the two-year mark, the more resistant the first group became. After multiple discussions, the elders voted that rather than rotating off on January 1st, that they would rotate off on December 31, buying themselves another 364 days. There was a reluctance to relinquish power. They argued that there wasn't a good enough pipeline and that they could not afford to lose the "wealth of knowledge and experience." Don reminded them that they had two years to work on this. Finally the first group rotated off, then the second group.

One of the elders from the second group who was on leave for a year came back and said, "I want back on the board." His request was brought to the elders and rejected. Another one of the former elders was invited back onto the board. The third group was about to rotate off and realizing that perhaps few of those who had served in the past would come back onto the board. Again, there was a bit of a battle to lengthen their stay. Another one of the former elders (this individual was one of the most powerful

individuals on the board) sent a letter to Don indicating that he wanted back onto the board. He was the first to request to come back on after Gage's departure. The elder board denied his request. The expectation was that there would be significant fallout but "he handled it better than we ever thought he would," but Don acknowledged that it was difficult because the individual forced their hand. Don also mentioned though that he felt that they have always had good elders but that the current nine board members are "starting to mirror what our new members are looking like and what our style of leadership is."

Mistakes in the Transition

Don identified three primary mistakes or areas he could have done differently in the course of the transition. The first was underestimating the weight of the job. He had served in close proximity to Gage for seventeen years and so he thought he was prepared. He thought he knew what to expect but when he actually became the one ultimately responsible for the overall ministry and personally experience the magnitude of people issues, staff issues and financial pressures, he was surprised. Gage ceased to be the target of the critics and Don began to experience criticism and opposition like he had never experienced before.

A second mistake Don made was one mentioned earlier regarding his relationship with the older part of the congregation. He should have done more to build bridges into these people.

I never in a million years would have even thought to have done that because I had a great relationship with them. I'm telling you what, they loved me. And it's just weird when I'm the guy behind the wheel that everything gets magnified . . .

I didn't anticipate it.

A third mistake that Don acknowledged was failing to stay in touch with Gage following his departure. This contact would have been beneficial to both Don and Gage, Don for counsel and support, Gage for him not feeling forgotten or discounted.

I always saw my ministry from day one as trying to lengthen Gage's ministry and so I was constantly trying to maximize his effectiveness by taking things off of his plate and being an encourager to him . . .

I think I probably could have done a better job even in the first six months of him being gone of staying in better touch with him.

I found myself not bothering him because I didn't want him to have to deal with stuff so I wouldn't even call him for his opinion on things because of the fact that, I thought, "Man, he doesn't need to know that this staff person is being a jerk or that I got a letter from the same dude that always wrote him, ripping me up now."

I felt like he . . . did his time.

In retrospect though, he and I having conversations, I think he was dying for me to call him just to talk or to get his input on things. I do better on that now but it was partly trying to shield him and it was partly trying to show him that I can do this thing. I mean he prepared me for it. He's the guy that really got me ready for it and I can do it but it is just—that first year is a real strain on your marriage.

About November, December, I was ready to say, "You know what I got a big ego but I don't need this . . . I don't need to be at a big church. I don't need to be. You know, "Welcome to McDonalds, may I take your order?" You say, "Is this what I signed up for?"

And you start having those talks with Gage and you realize—he is the only person who understands. He's the only person that understands.

Don talked in particular regarding the "sinister side" of people who publicly have good standing and are admired but who privately are devastating by their constant critique, undermining of trust and credibility, and divisive. This is the ugly underbelly of church ministry that few see. "Those are the things that very few people are exposed to

and you find yourself in a fraternity . . . just on the things that you [interviewer] and I have stumbled on that are so similar.”

Things Done Well by the Predecessor

There were a number of things that Don felt that Gage did well. First, Gage prepared himself effectively for transition by gradually giving up responsibility, visibility and authority over a long period of time. For example, in 1989 Gage preached forty-eight times and each year he preached less. Two years before his retirement he was down to preaching 24 times a year. At that point both he and Don gave up five additional weekends to accommodate the hiring of Karl, the youngest communicator. Don acknowledged that many senior pastors find it very difficult to “give up the pulpit.” “I share that just so you know that he was willingly taking himself gradually out of the spotlight. I think that’s helped with that transition for him because most of us . . . find our value from our job.” Don indicated that Gage still stays in contact with people at the church. He is speaking in various settings, including occasional preaching for the church.

Beyond that, Gage developed a number of areas of involvement that became full-time engagement following his transition. He travels extensively for speaking engagements. He set up a mentoring process for young pastors. Don said that Gage is so busy that he only had three free weekends between July and the end of January. Gage joked with Don that he needed a study break. Don believes that the busy schedule was by design because Gage felt it very important that he not be at Covenant Church for the first year following his retirement. Gage still had a strong desire to continue to make a meaningful contribution.

Gage didn't want to just retire and go play golf because he knew he had to; people wanted and needed to hear his preaching—which they do and while he is still healthy and can travel, why not take advantage of this?

At the time of the interview Gage had been back twice. Don observed:

It's still got to feel a little awkward to him because everybody sees him and they all make a big deal about it wherever he is in the church. I keep telling him, "Eventually it's going to get to the stage where it's, 'Hey there's Gage. How are you?'" That will be in about the year 2024—I think he's going to be beyond everybody stopping him.

Don also expressed the opinion that Gage's surprise move at the very end, when in his last six months he stepped aside as Senior Pastor to allow Don to assume the role, ultimately made the transition easier once he left Covenant. Don acknowledged that this move must have been very difficult. Gage was still in the pulpit and in the office next door to Don if Don had any questions or thoughts.

Don acknowledged the impact, however, on identity and the great sense of loss that follows a transition.

I think anybody . . . if they were honest with you, they would all have to say, that's the way it is—whether it's in their first six months, or they're in their third year afterwards. I mean I can't imagine doing something for forty years at the same place, at a church that you came to when it was three years old and you built it from 120 to 18,000.

You know everybody would probably say (it is painful with a great sense of loss and dismissal) if they were brutally honest.

I hope that doesn't hit Gage at the two year mark but I think he's doing the right things in the way he's approaching everything.

Second, in Don's opinion, one of the greatest things that Gage did was related to his words in his last message.

You know I would have had a file of people I wanted to lash out at but Gage says, "If I have offended you, please accept my apology. If I have failed to do something that you expect me to do, I'm sorry if I let you down." You know [he] goes through this thing and by the end you're like,

“No! You’re the man. You didn’t do any of those. We love you. Don’t hand it over to that kid! [Laughter]

You know the old joke about your last sermon file? [Laughter]. Let me open this thing. You’ve lived for this moment.

Third, Don felt that in terms of his own success, Gage’s decisions in two areas were particularly significant. The first was that Gage supported the mandatory roll-off and term limits on the elder board. The second was Gage not simply giving Don more responsibility but more authority as well so that he (Don) would be viewed as a leader versus someone who just filled the pulpit occasionally.

Initiatives of the Successor

Well before Gage’s transition, he empowered Don to shape the leadership team and to develop the over-all organizational goals for the coming years. This included shaping how the church would look different in the future than it has in the past.

The first large goal was to become more service driven because Covenant is seen as a white, upper-middle class megachurch bound to a large structure on a huge campus. The communication of this goal to the congregation was not without challenges as some interpreted the goal as a critique of Gage’s ministry. Gage was fully supportive and believed that the time was right for that.

So here I’ve got his blessing on that but when I say that from the pulpit, then I have people (saying), “How in the world can you undermine all that Gage did by saying that it’s time for us to be doing this?”

I had one guy say, “What do you mean Covenant has left the building? What a slap in the face to Gage. We were serving all the time.”

Or, “I can’t believe you would slap Gage after all he’s done for you.

My first series in August after Gage left was out of the book of Acts and we called it “Church on the Move.” An older guy wrote ripping me up

because of my goatee and not wearing a tie in the pulpit and “How dare you take a shot at Gage by calling the series ‘Church on the Move.’ This is a church on the move when he was here, not when you’re here.”

I wrote back, “Gage is the one who chose the series title for that”. . . I mean you can’t win anything you say about the previous. Anything that you say about a new direction is seen as a slap.”

The second major goal was to (out of the outgrowth of service in the community) to start multi-site campuses, expanding the ministry of the church to areas twenty-five to thirty-five minutes away.

Words of Counsel to Churches About to Go Through Transition

Don believed that Gage did many things well to cause the transition to go well but acknowledged that there is no perfect preparation for transition.

I don’t know of anyone who could have done it better than what Gage did. It’s smoother than any other I’ve seen but you’ll notice I didn’t say it’s been a smooth transition. That’s not because of Gage. It’s just too tough.

You can’t be at a place for forty years in something that is this size and expect everything to just, okay, “Now, you take the baton! Okay, Great. Everything!”

It can’t work that way.

Don felt in ways noted earlier in this study that Gage had done everything he could think of to set up the transition for success.

In terms of counsel, however, Don said that he would encourage churches to look internally first because an insider knows the culture. If there is not a qualified insider, then to look for someone who does have “the heart of whatever it is that church needs.” He did not believe that the successor needed to be the exact replica. Initially bring this person in as a guest speaker and see if the congregation responds to this individual. If

they do and he resonates with the church, then begin a conversation regarding his joining staff.

A short transition, twelve to eighteen months, is more optimal than long. Don acknowledged that people would ask him as to why he stayed as an associate for so long. He felt that his primary job was to lengthen Gage's ministry. He also felt that, given his own personality, the demands of being a senior pastor at a large church would have taken a significant toll on his family ten to twelve years earlier. Beyond that, "I got to play behind an all-American quarterback."

Don's closing remarks had to do with Gage's character as a person in allowing Don increasing opportunities.

Those are all ways in which I think Gage slowly took his ego out of it so that it would be easier for him after the transition . . . he didn't get all wrapped up in preaching to thousands of people. To him it was more of, "You know, I'm going to impart the word of the Lord however many people show up."

Nate—the Elder Board Chairperson

Conversations About Transition

Nate reviewed the sequence of Gage's early transition decisions, including the announcement to the congregation about six or seven years before his eventual transition. He also acknowledged that the elders had approved his recommendation that Don be the person who would succeed him as senior pastor. So the eventual transition occurred before the congregation's anticipated time of transition.

The Early Handoff

Gage's retirement was not a surprise nor was Don's succession of Gage. What was a surprise to the elders was the earlier than planned retirement date. Nate said that about three years prior to his retirement (at age fifty-nine), Gage realized that "he probably wasn't going to make it to sixty-five and that sixty-two was probably where his heart was." Gage came to Covenant Church when the church was three years old. About the time of the church's fortieth anniversary, Gage began to discuss with three or four of the elders about the potential of his retiring sooner than the congregation and staff were expecting. These conversations were kept confidential until about fifteen months prior to his actual retirement. At this time, the spring of 2005, the entire board discussed the matter and then announced that Gage would be retiring July 1, 2006. Some months later at a fall elder board retreat, Nate reported that Gage announced that to make the transition most effective, he would turn all day-to-day duties of overseeing the church to Don on January 1, 2006. So six months prior to his departure he turned all the functional and operational duties of being senior pastor over to Don and deferred to Don on decisions.

Nate believed that this early handoff served the church well in a couple of ways.

The first reason it served us well is, he was able to telegraph the pass—what I mean by that is Gage was able to let all of the congregation know and the staff know, a year plus ahead of time, that he was planning on doing this. So, now, that's good and bad.

The good is that . . . you telegraph the pass—you know exactly where it's going to land with Don on July 1st.

The bad is that you give an extended period of time for anxiety to work in folks. Gage has been here for forty years.

"What's it going to be like without Gage?"

"Don's a different kind of leader."

“Don has a different style than Gage. How does that affect the congregation? How does that effect worship? How does that affect the doctrinal integrity of what’s preaching from the pulpit.”

The irony of that is that Don was here for seventeen years so people knew Don. He was a known commodity, but just as change is endemic to any successful organization, change also creates anxiety.

Recognition of the Congregations within the Congregation during Transition

In the later years of Gage’s ministry, he and Nate observed that Covenant Church actually had three congregations. These were not openly defined or discussed congregations but as Nate and Gage observed how various parts of the overall congregation responding to change and to the transition, they realized that the responses to the transition very much were linked to the congregational groups.

The first group was at the original building. This group had grown from just over 100 in attendance to over 1500. The transition was most difficult for this group because the transition was not just a transition of the church, it was a change in the pastoral relationship.

Gage had married these folks’ kids. He had buried their parents. They had been on vacation with him. They had been on retreats with him. They had dinner at his kitchen table; he had had dinner at their kitchen table because the church was much smaller then.

So there was a personal connectivity and Gage was truly their pastor. And for those folks this transition has been most difficult.

The second group represented those who came to the church after the move to the second building location. This group grew from 1500 to 8500. The congregation moved into the second facility on Easter 1988 and Don joined the congregation within a year of moving into that facility. This group experienced the team teaching and came to view Gage and Don as interchangeable. The transition was a significant event for them. They

would miss Gage but, in Nate's opinion, there was not the "real anxiety that many of the folks in that core congregation had."

The third group represented those who came to the church after the move to the current building location Christmas 1999. The congregation has grown from 8500 to almost 20,000 today. Those who have come to the church in this time period saw Gage, Don and Karl interchangeably and primarily as teaching pastors. The transition was "pretty much a non-event" for this group from Nate's perspective. Because of the size, they did not have the personal relationship. They may or may not have been on a personal name basis but there was the understanding that the expectation of connection with the senior pastor in a congregation of this size was going to be reduced compared to those who were in the smaller more intimate settings.

Nate reported that the question for the leadership was how to reach out to those in the church body who would be most affected by the transition and yet not become so focused on the needs of 1500 people that they lose 18,000 others in the transition. The understanding of the elders was that the transition is about the church congregation "aggregate, it's not just about a core group of membership" even though this core group laid the early foundation and made the sacrifices essential to help Covenant Church get to where it is today.

The Transition Process

Nate shared that the elder board was not simply reactionary in terms of simply responding to issues of transition but was proactive as well in their own preparation. He believes that Covenant Church has had the best transition of any church of which he was aware. He wanted to make clear that this was not an egotistical statement but rather a

candid statement. There have been challenges but in comparison to other models that the leadership had examined, it had been an exceptional transition. He cited several negative, very public examples including Adrian Rogers, the late Senior Pastor of Bellevue Baptist Church in Memphis who walked onto the platform on a Sunday night and essentially informed the congregation that he would be leaving and that a pulpit committee had been formed to hire a new person. Another example he cited was of one of the largest megachurches in the country in which the predecessor transitioned but then stayed involved in every day operations “because of the autocratic nature of his leadership style.” The leadership examined dozens of transitions for their own learning and so was able to have meaningful interaction with Gage and Don in thinking through the transition process. “In spite of the challenges, we really feel blessed. The reason I go into so much detail about the challenges—just to be candid and honest with you. Not like, ‘Oh, everything’s wonderful!’ But at the same time, it’s not been all bad either.”

Nate spoke freely and at length with few interview questions being asked regarding the transition and so this section seeks to present his general themes.

Why the Transition Worked

Nate said that the transition worked at Covenant for two reasons: Gage’s humility and Don’s humility.

And where I have seen transitions in other congregational bodies that haven’t worked was when the departing pastor was obsessed with leaving a legacy, or the incoming pastor was not willing to defer in the transitional phase to the departing pastor.

Nate said that despite the significant difficulty of having two strong, dynamic leaders co-existing side by side, the transition at Covenant was effective because of the marked

humility of Gage and Don. Both men strongly advocated one another. In addition, Gage invested a significant amount of time building consensus for Don.

Don has no bigger fan when he was here or since he's been gone than Gage Miller. And Gage Miller has no bigger fan than Don. And the mutual respect and admiration and understanding that they have a different teaching style and a different gift set and yet the Lord is still using them in . . . unique ways that helped set the stage for what was I think a successful transition.

Gage spent a ton of time building consensus for Don. He spent time building consensus for Don from the platform. He spent time building consensus for Don with Sunday School and Adult Bible Fellowship Groups, behind the scenes, one-on-one with leadership, with our deacons, with our core membership, with friends, small group settings.

So like I say, the primary reason Don is able to be successful in this transition is that Don set the stage BUT ALSO because Don was willing to be here for many years following the announcement that he would someday be the senior pastor, and defer to Gage even though maybe he disagreed with something or a way that Gage might have handled something.

The Transition of the Preaching Team

Gage possesses strong, "in-depth Bible preaching style." Don tends to have more of an "evangelistic, preaching style," including lots of humor and personal illustrations. Don had an ability to connect with people that Gage could not and Gage had an ability to connect with people that Don could not. So as the elders began to think about Gage's transition, the decision was to pursue someone who had more of Gage's gift set than Don's. Karl was hired and has been described by some as a young Gage Miller. Don and Karl have developed an exceptional working relationship similar to the one that he and Gage enjoyed. There is open acknowledgement of the differences of skill and audience effectiveness, but celebration of the benefits of these differences.

The Transition for Gage, the Predecessor

In Nate's opinion (and shared with good humor not critique), Gage did not prepare himself effectively and yet he is in a good place today.

Up until within a year, maybe even six months prior to him leaving, he still didn't know for sure what he wanted to do and the guys who were serving on our elder board who had already transitioned said, "Gage, you got to have a plan. You got to have a plan! You got to know what you're going to do or you're going to be bored."

Gage is a type A driver personality who works sixty, seventy, eighty hours a week. He survives on four to five hours a night of sleep and he's not a person who would do retirement well sitting home watching Oprah. It's just not Gage and everybody recognized that.

Gage considered a number of possibilities including leading another church for five to ten years, traveling and speaking, and training and mentoring younger leaders. The outcome was that Gage is preaching almost every weekend in various churches, being booked out years in advance. He is leading a training organization and mentoring young leaders of megachurches. Nate felt that the freedom he gained January 1 by stepping out of his day-to-day responsibilities allowed him to explore other opportunities.

He was entrenched—you know this is an enormous responsibility—and he was so entrenched in that, it was just hard for him to . . . get out of this envelope and see, "Okay what other opportunities are out there?"

That spring and throughout that early summer, God just led a number of opportunities to his door and he's as busy now as he's been when he was working here. The difference is, the stress is off of him. He doesn't have the burden of the day-to-day responsibilities that he had as senior pastor of the church . . . he has really been able to do his sweet spot which is the preaching, teaching, mentoring and kingdom work that he's really passionate about.

As you know, the hospital calls, the death of a child . . . the grieving parents, the notification that . . . somebody developed a terminal illness—whatever it may be—that just wears on you.

Day after day after day and he carried that burden for forty years with all those folks and so that was just like a weight lifted off of his shoulder.

Nate believed that Gage's biggest challenge was underestimating the emotional effects of stepping away after being a decision maker and the senior leader of a large organization.

When you've been the decision maker and you actualize on decisions, multiple decisions, every day, seven days a week and then you step out of that role, that's a transition and it's as similar to a transition you would make transitioning a family business or transitioning out of corporate life.

The Transition of the Elder Board and the Staff

Not only was there a transition of the platform ministry and the Senior Pastor, but also a transition of the elder board (as earlier discussed) and the staff team. Nate was convinced that a transition of the board must take place in conjunction with a transition with the successor. In the Covenant Church system elders served indefinitely. The result was that elders who may have been effective during a particular season of the church's life may not be as effective given current needs. Nate reviewed the mandatory "roll-off" system. This forced change reduced the size of the board from twenty six to nine members.

Nate did provide some insight, however, relative to the composition of the board.

Our previous board primarily had men who were very gifted administratively and had corporate backgrounds . . . senior executives from Fortune 500 companies.

Today our board is almost entirely entrepreneurial . . . six . . . own their own businesses, another is the president of a division of a company . . . so today we don't have anybody that works for a Fortune 500. We don't have any mid- or senior-level managers, so you think different.

And the mindset is different because experientially it's different . . . what I think has happened is that God served us well to have a board that was

wired the way they were when Gage was here and when we moved into this facility we really needed to shore up administratively the church through those periods of dynamic and rapid growth.

Don . . . his leadership style tends to be less hierarchical than Gage's so as a result Don does well with a leadership team.

Under Gage's leadership, the church tended to be very committee driven. Each of the elders led a committee and was assigned to a staff person who had a committee of staff. Today Covenant Church has a "much more fluid management structure." There still is hierarchy, an org chart, but there is a "lot more collateral flowing in perpendicular directions in that org chart than it did prior." This structure serves Don's management and leadership style more effectively.

Challenges and Conflicts in the Transition

At several points in the interview, Nate clarified that the transition has been very successful but he wanted to speak candidly regarding the challenges of their transition in the hope of helping others about to enter the same process. The conflictual nature of transition was brought into sharp focus with Nate's candor.

Conflicts within the Congregation

Several key issues were identified as both contributors and illustrators of the dynamics that unfold when a long tenured leader leaves. Nate observed the differences between a church transition and a corporate transition.

The difference is that because the constituency, the congregational constituency is different than a peer constituency in business or a vendor or client constituency in business.

In a business if you're still delivering the same product, if you're stamping widgets, and if client A still gets their widgets by nine a.m. Thursday morning, it's oblique to them who is sitting in the CEO chair.

Our constituents—it's a much more esoteric discipline, as you well know, in the pastorate.

People evaluate everything. From whether you wear a tie or not, to whether your slacks are pressed, to whether your shoes are polished, to whether or not you have a goatee or a mustache and facial hair, literally, to why did you sing this type of hymn?

Did you add a drum? Why an electric guitar? Why not a folk guitar? You know the sermon was twenty-eight minutes instead of thirty-two. The scripture references were—you know, you name it

And there's a sense that you have 18,000 critics even though you're delivering the doctrinal fidelity of the gospel on a weekly basis and that makes this much different than business.

Nate spoke earlier of the downside of one full year of knowing that the forty-year leader of the organization was going to be leaving and how that fueled anxiety with a core group of membership. "Because of THE CHANGE, then every little change is amplified." He cited three examples of how every change is amplified and interpreted.

Examples of How Every Change is Amplified During a Transition

The first example he cited was the remodeling of their atrium with new carpets, colors, bookstore and coffee shop. The project was planned one year before Gage left. He was enthusiastically supportive. The elder board was excited about the project. The project was delayed for multiple reasons so that the actual demolition stage of the project was not able to start until after January 1, 2006, within days of when Don took over responsibilities as senior pastor. The demolition took on powerful symbolism among the core membership. Ultimately it unleashed what the elders termed "the perfect storm."

By late fall, early winter, we had remodeled the entire atrium so now what happens is it looks like it was on Don's watch. Don wanted the new carpet and rumors began to start out . . .

“Did Don’s wife pick out these colors?” and “we don’t like these colors.” And “It looks like Las Vegas.” “Why would we do this? Gage would have never allowed this to happen.”

Well in fact, Gage knew it was all happening.

Gage was excited about it but it was “the perfect storm” that blew and so there was that whole—that whole anxiety, again with some of those core folks . . .

I don’t think that’s atypical to many transitions—the difference is we had not only visible tangible reminder from the pulpit, but, OH, simultaneously we’re building a \$20,000,000 ministry building and we’re moving all of our staff into it and we’re getting ready to build 77,000 square feet of youth addition to the facility.

So, you know, we’re doing a \$35,000,000 capital expansion of our facility at the same time that we’re transitioning the platform.

So people are seeing changes from the pulpit. They’re seeing changes when they walk through the atrium. They’re seeing building . . . All this stuff is happening that just amplifies this feeling of, “Hey, this wasn’t the way it used to be.”

Nate then reflected that the perception of the leadership was that the agitation was only in a small segment of the church. He ventured that perhaps eighty percent of the congregation was enthusiastic; ten percent didn’t even know that changes were happening; and ten percent of the congregation experienced the high level of agitation. The deep concern for the elder board was that this ten percent represented the core members who were writing letters and making phone calls of concern. Nate said that the leadership struggled with how to “reach back to those folks and still keep moving forward.” The staff pastor to older adults described it this way: “we want to respect where we’ve come from and appreciate the values of how we got here, but we can’t coddle. We can’t coddle the anxiety because if we do we feed the anxiety.” Another issue that Nate raised was reaching back to the ten percent but not being so obsessed with this group that the vision of Don and Karl for the future is lost.

A second illustration of the high level of sensitivity was the rewording of the mission statement. The mission statement that has served Covenant Church for many years has been retained but a more succinct stating of it was developed. Again the sense was, “Well, is the old mission statement not good?” Nate acknowledged that communication is particularly critical in times of transition and that at times they did a good job of communicating and at other times a poor job.

I think early on we did not recognize the potential anxiety with a few folks that we should’ve communicated more effectively to and I think today we’re doing a much better job a year into communicating.

And a transition is . . . not a week or a month . . . it’s a year before and a year or two after.

Again, Nate mentioned how positive overall the transition has been, but that transition is not a point in time. It is a process with unpredictable elements and tension points.

If you’re not careful you can let a group of vocal, outspoken, talking, letter writers really get your eye off of the ball. Now, you’ve got to respect their opinion and value their opinion and try to build consensus with those folks, but if you feel led of the Lord to go this direction, you can’t stop and return just because you got some folks that aren’t happy with where you’re going.

Gage has said that he thinks a lot of people want to freeze the church the way it was when they joined, both in terms of physical structure, in terms of worship style . . . that was their comfort level and that’s where they are. And a lot of folks never grow past that.

You’ve got to educate some of the core seniors about . . . what the role of the church is.

He spoke about conflicts that emerge over musical style and regarding paint and carpet colors. He spoke respectfully and acknowledged that the individuals offering critique have valid feelings but there is a lot of emotion packed into the critiques.

It's just—it's unbelievable as you know, the challenges you have and basically we said to folks, "These are not tenets of the faith. These issues are not issues that we are going to remove fellowship with one another on . . . these are not issues to become concerned about."

The third example that Nate cited illustrated the sensitivity in a portion of the congregation related to the renaming of adult classes. At one time the ministry was called Sunday School, then Adult Bible Fellowship later shortened to ABF. In an attempt to develop a more inclusive title for all the groups that met on weekends, ABFs were renamed Weekend Groups. The director of adult education made the change without informing Don or the elders (which was fine from the leadership perspective). A letter was sent out that Adult Bible Fellowships are now called Weekend Groups.

And most folks went, "Eh? Okay."

But we've got some folks that went nuts because we took "Bible" out of the name.

"If we're going to call it 'Weekend Groups,' it needs to be 'Weekend Bible Groups.'"

And you know if I've heard it once, I've heard a hundred times, "Slippery slope," I'm just about to scream. And so somehow these folks will equate that by taking "Bible" out of the weekend group, calling it "Weekend Groups," instead of "Adult Bible Fellowship," this supports their fears that, "We're going to become an emergent church and the next thing you know we won't preach against [whatever issue]. . . and all of a sudden the cross is going to come down in the sanctuary like at such and such a church and you know all these trends—it's a slippery slope!"

And it feeds that fear that we have to work hard to, to counteract that fear, and shore up those folks and give them comfort and confidence that Covenant Church was built on the fundamentals of Scripture and is going to survive on the fundamentals of Scripture.

The Response of Leadership to the Challenges and Conflicts During Transition

Nate shared three responses, the first two of which he stated are not productive. The first is to “tell people to get a life” and to tell them how ridiculous wall color issues are. The second is that as the ground swell rises “Be an ostrich . . . put your head in the sand and ignore it.” The idea is that if you ignore it long enough maybe it’ll just go away and die down.

The third, the correct thing to do in Nate’s view, is to open a conversation in which concerns are legitimately considered. Those concerns deserve a response by the leadership. The pace of change needs to be slowed down and more deliberate and intentional than perhaps the leadership is ready for. He spoke to the New Testament call for unity. “It’s a challenge because you have to be able to listen to these folks and at the same time say, ‘Look, gossip is divisive in the body.’” He felt that openness, dialogue and honesty are all important but that if there are not direct conversations, the congregation will be divided. If concerns are only voiced to others and never directly shared with leadership, the concerns cannot be addressed. Every member (in Nate’s opinion) has a responsibility even in the fact of disagreement to seek to work towards a common end.

That’s hard . . . because you’ve got a sixty-five year old who has a forty-five year old senior pastor, a forty-three year old chairman of the elder board and a thirty-year old associate pastor . . . We’re the age of many of these folks’ kids, some of their grandkids even.

Nate did speak to the encouragement in the transition of those who say, “I hate the color of the carpet in the atrium and you know what? It means nothing.” In other words, it is not important in the overall scope of things. He spoke of those who don’t like the music and yet have a vision for the younger generations who are the future of the church.

Again he reflected on the fact that with 20,000 members and just one percent is not happy, that's 200 people. If each one of those just calls once or sends one letter each month, it would be possible for a small vocal minority to skew the entire perception of the leadership.

You get three or four calls a day and three or four letters a day and you begin to think, "Wow, there's a lot of people that feel this way."

Well, there are some.

Gage said when he was here that was one of the more discouraging things to him. You don't get that many of the "ataboys" and "a great sermon," or if you do it doesn't stick with you as a leader like that negative comment does.

Counsel to Other Churches

Nate mentioned that this question is not a question of theory for Covenant Church as almost 100 churches had contacted them seeking counsel for a transition. Some of the churches had problems with the elder board or senior pastor or finances. First, Nate believed that the key to a successful transition is the departing leader. He again spoke of his great admiration of Gage, admiration and respect shared by those on the board and staff. "There's nobody who finished stronger . . . that's what makes him an exceptional human being." He believes that the current leadership has a great opportunity to follow him in this succession. Don considers it a privilege to succeed Gage.

Two of the primary attributes embodied by Gage were humility and championing the new leader. He sought to build the bridge between his leadership and the new leader's leadership. Nate believed that the predecessor:

Has to be the champion of the new guy and it can't just be from a token standpoint on Sunday morning, behind the scenes, to his friends. I mean, he's got to be 100 percent about that.

And the thing is if you think about it, you spent the better part of a lifetime serving and building and growing a ministry. You want nothing more than your legacy to not be about you . . . for that ministry to continue to flourish . . .

That's what Gage wants most for Covenant Church . . . he could care less about his legacy. As a matter of fact he told me, "Whatever you do Nate, you're going to be here . . . statistically twenty-five years after I am . . . make sure they don't put a picture of me in the atrium . . . or a statue when you walk in . . . I don't want anything like that."

Nate said that "God built this church," for many years through the work of Gage and today he is "building and growing" the church through the work of Don and Karl.

A second matter of counsel is that the new senior pastor and the leadership need to have a strong commitment to one another. There needs to be unqualified support for the successor by the leadership. A transition of loyalties and even personnel needs to take place on the elder board for the transition to succeed.

Here's what happens. You got a board of elders and they had a working relationship, and a closeness and a fondness and comfort level with senior pastor number one.

Uh, senior pastor number one retires, the new boy comes into town. Now seventeen years, Don's (been here but is the new guy). But you know the new guy comes in and what happens in—we've seen—now this was not the case in our congregation, but I've seen it in many congregations, those folks begin to second-guess; they don't have the comfort level in the new pastor.

So what happens—a natural reaction for elders is, they dip into day-to-day ministry which isn't what they're supposed to be about and so instead of shepherding the flock and serving as overseers, they dip into the day-to-day responsibilities of ministry that they've got no business being in.

And it's a dangerous water to tread in and it's one that happens a lot in transitions so you literally almost have to transition or a willingness to transition the elder board as you transition the platform.

There's nobody that were bigger fans of Gage than those guys. I mean they were Gage's elders, and you know, those guys, me included, would

take a bullet for Gage. But I can tell you the same is true with Don . . . these nine guys, they're juiced and pumped about where we're going as a church . . . they're a 110 percent behind Don and behind Karl and they're willing to take the hits.

Nate spoke of his own experience of seeing transitions that are successful in terms of the humility of the predecessor and the successor. There is a good working relationship between them. However, problems develop in the leadership such that support is given in the context of a meeting but behind the scenes they critique the leader, "they'll be divisive and so that division stirs and churns . . . and the next thing you know it explodes in the church."

Third, Nate identified four fundamentals to transitioning a church. He said that most churches only do one (identifying the new leader) but all four are essential.

- The first (and the most important in Nate's opinion) is the transition of the leader. A new leader needs to be identified.
- The second transition is the transition of the congregation. Congregational transition needs a lot of lead time with an abundance of communication.
- The third transition is the transition of the leadership board.
- The fourth transition (after the leader, congregation and board have transitioned) is the transition of staff.

The final counsel that Nate offered was the importance of honoring culture, process, people and time. He cited the example of another megachurch with which he was involved that experienced two senior pastoral transitions within a five-year period. The first successor came in and "blew up the church" with little sensitivity to the culture and needs (in Nate's opinion) of the church. Several thousand left. Others stayed but were anxious. The church then almost tripled in size. "The problem was there wasn't any flesh

on the bones.” Then the successor decided to leave for another opportunity, but the word leaked out to the media before he had a chance to inform the congregation. People picked up their Sunday newspaper to see the news that their senior pastor is resigning. Not only is he resigning but he is going to be gone in less than a month. “It was a terrible transition . . . I love ___(the pastor)___ but that transition was screwed up coming in and it was screwed up going out.”

The successor of the successor has now been left with the task of “building a bridge backward before (he) can drive forward.” He is having to rebuild trust, not simply because of the dramatic nature of changes in a short period of time but then the abandonment congregational members felt from this leader who had sold them on his vision.

It takes a long time for a wounded body to heal. It’s not some antibiotic and a Band Aid and you’re done. It’s major surgery.

And when you remove a senior pastor be it from retirement or because they’re transitioning to another job . . . you’re transplanting vital organs. It’s a heart transplant. It’s a lung transplant. It’s not a little scrape or an abrasion where you put some stitches and go on.

I think many folks fail to realize the causal effect in the congregational constituency.

He spoke of one of the largest megachurches that has recruited senior level staff from other megachurches and apparently had little concern for the transition process. He believes that churches need to have a more global mindset. He termed this “having a kingdom mindset.” If a church benefits from “the heart transplant” but we leave a dying and wounded church, we don’t do any good for the kingdom. Even churches that seek to hire someone away from another place need to be concerned for how the transition is navigated.

Derek—An Involved Long-Time Attendee

Derek served in a number of volunteer capacities at Covenant Church including the church medical team, mission teams, and music ministries. He and his wife have attended for fifteen years and represent the older population at the church.

The Transition

Derek recalled that before the move into their current facility the topic of transition first came up. The congregation was made aware that the transition was some years into the future. From Derek's perspective, it wasn't shocking given the number of years that Gage had served at the church. "It was inevitable that he was going to be leaving."

Preparing the Church for a Change in Leaders

The early announcement that Don would be succeeding Gage in the next seven years was helpful in Derek's opinion. He acknowledged that Gage decided to leave earlier than originally planned but the definitive departure date took uncertainty out of the process.

Another thing that the leadership did to help prepare the congregation was to communicate openly regarding the transition.

They started announcing it from the pulpit and I think Gage talked very freely . . . the board talked about it, that he would be leaving. The board gave their blessing and so it was talked really very openly from the pulpit but as the decision got closer and closer, then they got more specific. Don is going to take over.

"This particular year in the future will be my final year." And the interesting thing too was that then Don started preaching more.

And Gage announced that as a very specific decision on the part of not only himself but the elders . . . that since Don was going to be taking over that he would need to be preaching more. And so I think that was a very good transition . . . we just saw his face more often.

Aspects of the Transition That Have Gone Well

The first aspect that Derek mentioned preceded the actual transition. He raised the changes in the elder board, specifically the change of chairman, as an important part of the change. He mentioned that under Gage's administration, Jack, had always "been in control." He admired Jack's leadership, particularly that Jack did not "care for the limelight." The congregation had the secure sense that if any major issue came up, Jack, Gage and the elders would deal with it appropriately. Then there was a change in chairman from an older, experienced leader to "a very young" leader, Nate, with good business skills and someone who "likes being out front and doesn't mind the limelight." Derek felt that the change in chairman while Gage was still there was intentional on the part of the elders. Derek indicated that he was not critiquing Nate but his (Derek's) generation was concerned about his experience and wisdom levels simply because of his age. He did acknowledge however that this change in the elder chair went very well and was instrumental in preparing the church for change. It was clear that the entire elder board was supportive of this change, again this occurring while Gage was still serving as the senior pastor.

A second thing that went well was the "respectful way in which Gage left." Derek acknowledged that every leader has detractors, but he believed that it was rare for a senior pastor to transition in "such a warm and loving fashion."

And not just that he was revered but that he was respected. I think that the way the church did that, letting people know, it gave people time to prepare for his leaving.

And I know there was a certain sense of grief . . . there wasn't weeping, gnashing of teeth or anything like that, but there's always a certain sense of grief when there's a passing of a significant person in your life . . .

Because of who Gage was, Gage did not want the spotlight on himself and the more he turned the spotlight off of himself, I think the more people realized, probably, what a wonderful man he was.

A third thing that went well was the gradual elevation of Don to greater visibility.

In Derek's view, Don "seemed to rise to the occasion of being the head pastor." Over time his communication became more confident and "rising to the occasion." Because of Don's skill, Gage's attitude during the transition and the strong transition of the elders, "there was a dip in emotion as Gage was leaving but it didn't bottom out."

It wasn't like there was devastation. There are just some things in a personality you can't replace once you've become so used to them . . . probably went on virtually without a hitch, understanding that the elders and the staff probably have access to information and episodes and what not that we, the laymen, don't have access to.

But from a church perspective, it seemed to go very, very well. I have a feeling Gage was getting tired. Gage was getting tired [repeated]. And you could tell it on his face, his demeanor and . . . I think he tried his best to be Gage but he, Gage, was just getting tired.

But as far as what didn't go well, I can't think of any glaring defect in the entire transition.

Another matter that was handled well was the diversity of celebrations rather than just one large celebration. Gage and his wife celebrated with the founders, with the staff, and various parts of the congregation. It was a very planned and very respectful way for the various groups to have time with Gage and his wife to say goodbye and say the things

that they most wanted to say to them. Derek was impressed with how intentional and strategic this process was.

Finally, he believed that although it is apparent that Don has been ready to make some changes at the church, he has not done so simply to put his “stamp” on the organization. He has been patient and yet intentional about moving forward.

Challenges in the Transition

If there was a critique of the whole process from Derek’s perspective, it was the assumption that since Don had been here so long, he was owed the opportunity to become the senior pastor. Derek is not critical of Don but wondered if the manner in which the transition was handled put a “limitation on the Spirit to possibly move someone else to head the church . . . was there somebody else that the Spirit may have had in mind for this position?” Related to this concern was whether or not this transition “sapped initiative on his part” versus inheriting many established programs.

Derek also acknowledged that the transition has been difficult for some of the older members who had been with Gage in the two previous building locations.

It was interesting the talk that you would hear about, “Well, we’re leaving as soon as Gage leaves . . . I think that was probably a little misplaced loyalty.

Was there an exit to some degree? Undoubtedly. I think a very small exit. But I think the one group . . . we heard from the most.

Usually you didn’t hear from the younger people ‘cause Karl and Don are here. “This is our stuff.” So I think it was probably that group (older adults) that felt a little disenfranchised.

He believed that Don had some challenges of dealing with programs and traditions that Gage had put into place. The challenge was “Do I dare make any

changes?” In Derek’s view, the more casual platform dress was implemented very quickly.

The other challenge seems to be in staff. He believed that the church was constantly struggling with reorganization to the extent that a new organizational chart seems to appear twice a year.

I don’t know how much of that is Don, if he’s struggling to have his own identity. Sometimes when the chief leaves, then things that maybe were kind of suppressed and not talked about, kind of bubble up to the surface and all the sudden, the new guys have to deal with it.

But as a group, I think the staff has struggled and my reason for saying that is just based upon how frequently the organizational chart has been restructured.

I think that’s concerning and for the people that work here, they’re always kind of wondering who they answer to now. When will it change? Et cetera, et cetera.

Derek was reluctant to offer any critique of Gage but he did believe that Gage was loyal to a fault to staff members. “Sometimes was even blind to things that should have been dealt with on a staff level.” He didn’t believe there were dark or “heinous” things going on but recognized that Don probably had to deal with a number of inherited situations.

In Derek’s opinion two large staff issues need to be resolved. Establishing a more stable organizational structure is one of the most important challenges for the leadership team. The constant changes are destabilizing to the staff and to the congregation. The second large issue is that staff need to function less in a corporate manner and more in a relational, pastoral, communal manner.

Gage's Preparation for the Next Season of Life

Derek said that the congregation understood that Gage was an energetic leader who was not actually going to retire. Rather he was going to refocus his energies. He believed that the elders helped facilitate this by allowing Gage to have more frequent speaking engagements outside the church. He began to more actively pursue other activities setting “the stage for the fact for some point in time, for a year, Gage wouldn’t be around at all.”

Counsel to Others Anticipating Transition

Derek offered the following counsel to churches facing a transition process. First, “Give plenty of advanced notice, coupled with many opportunities for communication, including question and answer sessions” was the first counsel that Derek offered. People will have questions such as, “Why are you leaving now? Second, grant dignity and respect to the predecessor in his exit.

Third, avoid a long departure time. Derek believes that if there is no one on staff who is the heir apparent, then two years is a sufficient amount of time to hire the successor and navigate the transition. Three years he believes would be too long. He did not completely understand why the long transition worked at Covenant Church but believed that it would be difficult for this to work in many situations. Derek did believe that it was good that Gage shortened his transition period.

I’ve ridden with Gage a number of times when he would go speak . . . I never understood the intense pressure and the responsibility and the phone calls and the less than complimentary emails and letters and he spent half of our trip, you know, hour and a half trip . . . on his phone, dealing with . . . putting out fires.

Don, I'm sure had to do some of that but as long as Gage is here, if people have a complaint, they want to talk to the senior pastor and Don's just not going to do.

I think it's difficult when you have it that long . . . In my own heart, I'm just kind of surmising, putting myself in Don's position that maybe he struggled with that second in charge identity that, yeah, people like him, they liked the way he spoke but the reality was, there was nothing like Gage.

Gage was a master in the pulpit and so you used to have to kind of wonder. It's kind of like being the co-pilot for fifteen years . . . that's your job. "I'm co-pilot," . . . then one day you move over to the next seat and you're a pilot and it's a difficult transition. And I think Don probably has kind of struggled with the identity really becoming senior pastor, how his family is kind of the first family. I think that's been difficult on both the kids, I think, to a certain degree.

Finally, look beyond the church even if there is an heir apparent. Derek came back to this theme of "potentially limiting the Spirit." He raised Karl as perhaps an illustration of this. Although he has never discussed this with anyone he wondered what the outcome might have been if Don and Karl went head to head for the job because of Karl's exceptional skills as a communicator.

Final Thoughts as an Older Member

Derek closed the interview with remarks regarding concerns he has about the future of Covenant and the leadership of the young leaders now at the helm of the ministry. The first concern related to the absence of mentoring, authentic relationships. As one who spent a great deal of time with Gage, he reported Gage sharing his negative legacy as: first an apparent endemic superficiality in individual congregational members—Covenant, like many churches being "a mile wide and an inch deep," and second, the high rate of failing marriages in the church. Derek believes that the reversal of these trends represents a monumental challenge for Don and Karl. He expressed the

opinion that depth of relationships is more important than huge numbers. Mentoring of younger leaders needs to be a focal point for leadership. He spoke of the importance of moving beyond simply gathering large crowds of listeners and the need to help people converse at a level that promotes more transformative change.

I'm kind of like Wesley (John Wesley, an early leader in the Methodist movement in the 18th century). Wesley would never go in to an area unless there was a church that had an established follow-up. I remember him saying, "I have no desire to breed children . . . and then let them die." I'm kind of the same way.

A second concern he has for the church is the temptation to "chase culture." A part of this is the creation of celebrities in the megachurch with huge screens and people projected on the screens. "I'm not saying that Don or Gage ever acted like a celebrity but they are treated like that and they have to have armed escorts and all this kind of stuff." He would like to see the IMAG (large screen projection) to come down and for Covenant to get away from the celebrity status of those on the platform.

A third concern is the tendency in Gage's generation to become too results-oriented such as how many teams were sent out, hosting the largest __(national)__ conference. Certainly there were positive motives but what was accomplished could take on too great importance. Size allows as well the megachurch to go it alone versus cooperating with others.

Derek believes that Covenant Church is doing many things right but as an older member has these concerns with younger leaders leading the ministry.

Warren—Senior Level Staff Member

Warren's first involvement with Covenant Church was a one-year internship. After graduation from college he served as a preaching pastor in another church for two years. Covenant Church then contacted him and asked him to join their staff. He has served in various roles for almost ten years, each role with increasing responsibility. When the senior administrator left the staff to return to the corporate world, Don, the successor, asked Warren to apply for the role. Warren has served in the role as senior administrator for three and a half years, thus bridging Gage's and Don's leadership. His resignation from the church to pursue a preaching role became public the day of his interview.

The Transition

Warren became aware of an eventual transition very soon after he began his responsibilities ten years ago. He sensed that the transition from Gage to Don was simply understood within the organization, not officially at first but unofficially. Warren reviewed the announcement sequence others shared in their interviews in which Gage gave years of advance notice that Don was going to eventually take the lead. "Very early on that was established and understood which I think was of great value to the church—to answer that question and to confirm the assumption on everyone's part. Warren said that Gage also began to identify his fortieth anniversary as a time for him to step aside. He felt that once that was verbalized it accelerated the time line. Warren viewed Gage's early transition out of the role as a "stroke of genius."

It gave Don the opportunity to lead while Gage was still there and gave Gage the opportunity to finish out his time at Covenant without feeling

like he had to make all the normal decisions he would make right up to the last day.

And so rather than this screeching halt, abrupt end, we had what I think is one of the more smooth transitions for a church of our size.

And then as a credit to Gage, his leadership and integrity—it is a credit to Don, his leadership and integrity—and I think it's a credit to . . . God's influence on our leadership, early on to say, "You know, we don't want this—this is getting so big it's scary and we don't want this to be about Gage." Gage certainly didn't want that. So they were wise enough to say early on, "Okay, let's build into our future a little bit and get this all rolling ahead of time."

I just think God has been in that for many, many years now.

Things Done Well in the Transition

The gradual increasing of Don's preaching opportunities and the decreasing of Gage's preaching responsibilities gave a sense that a slow transition was taking place. Don's increasing skill in communication gave the congregation increasing confidence in him.

Warren also believes that Gage's entrustment of Don with increasing responsibilities including the chairing of the committee that developed the large complex that now houses the congregation were key to the success of the transition. The responsibilities came with additional visible organizational authority.

Warren also was struck on Gage's clarity with the congregation that the church was not centered on him. He openly affirmed Don and sought to instill congregational confidence in him.

There's something to be said for the subtle and not so subtle ways that Gage would make it clear to people that . . . one of these days, "I'm going to be out of here and the church is going to go on, and you guys are going to do fine and Don is going to do fine." He regularly repeated that message.

Warren felt that Gage also tried “his best to stay off” of being placed on a pedestal. He communicated these statements regularly to try to give his successor the best possibility of success. The early hand-off was crucial as well to the transition.

Parts of the Transition That Didn't Go As Well

Warren said he was very impressed with the entire transition. He didn't feel that there were any major oversights.

Gage's Transition

Warren, as senior administrator and the member of the staff most involved with the details of Gage's life, observed that there was a time when Gage was very concerned about the next chapter in his life. He described Gage as a very driven person, up “at the crack of dawn,” and not happy unless he was busy. Gage realized that he would not do well simply retiring to a life of leisure. Gage chairs a non-profit board. He mentors fifteen to twenty young leaders. “He's a sage of ministry and preaching and how cool that he's willing to do that.” Gage appears to be more busy in his retirement than he was in his last several years at Covenant Church to the point of over-scheduling himself, fearing that he wasn't going to be busy.

The Staff Transition

Warren occupied the unique role of serving as the senior administrator for both Gage and Don. He believed that the success of the transition largely related to the predecessor and the successor, though different, were remarkable leaders. Warren spoke

first regarding the two leader's attributes. Personal integrity, character and humility were three of Gage's attributes that stood out most to Warren.

Gage, in spite of him trying not to be, he's become kind of this icon . . . and so you have this guy that everybody has this tremendous respect for but at the same time, he's very down to earth.

He's very genuine with people. He cares about people. He loves to laugh. He loves to laugh at himself. And so, you know, he doesn't believe his own press and there's something so attractive about a leader like that. Gage was quick to give the credit to other people. He was fast to take the blame when something went wrong.

Warren spoke of Gage's "almost fatherly" persona and how he inspired those around him to give their best effort. Those who worked with Gage did not want to disappoint him and felt "so blessed to be a part of this guy's staff."

Warren spoke with admiration as well for Don.

Don is a very charismatic leader and person. He loves people. He is probably one of the most brilliant "people" people I've ever seen. He just has a way of putting people at ease, making them feel comfortable, making them feel included.

He is a brilliant strategist I think. For someone who is very much a sanguine personality, he has a very methodical, strategic side of him that most people wouldn't assume, so I've come to appreciate that.

Warren contrasted the two leaders as Gage being very focused and Don, more social and fun-loving in meeting settings. Warren said that Don makes even the most difficult meetings enjoyable. "You're going to belly laugh several times in whatever the meeting is, so he is great. And because of that he's got a great gift for diffusing the situation with humor."

Most important from Warren's perspective was the deep respect that the leaders displayed towards one another both publicly and privately. This respect was instrumental in setting the whole tone of the transition.

It was neat to see how they worked together, how close they were, how much they respected each other. And so you know there was never this feeling of while you see them up front, that's how they act up front. And then here's how they act in private. There was never a duality to that.

You know what you saw in the pulpit and how they would interact with each other, joke with each other, make fun of each other, you know is the same way they would be in private and it was so refreshing to see that authenticity between them.

The Challenges for the Senior Administrator

Warren spoke of the privilege of having a “front row seat” with the opportunity to witness some amazing developments. At the same time, he spoke of the challenges and conflicts of the role, particularly in a transition. One of the primary challenges was that the senior administrator leads the staff and so strong leadership skills are required because in reality the senior pastor is the leader “so that’s a difficult tightrope to walk.” Warren believed that Don would affirm that he (Warren) “tried to be very careful and make sure that everybody knows—he’s (Don’s) the leader and Gage before him.” Warren was there to assist them. Another challenge was that by the time an issue came to the senior administrator level it was “pretty significant . . . it’s gotten more tangled and more complex.”

Lots of smart people have said, “Gosh, I don’t know, see what he [Warren] thinks,” . . . so that doesn’t leave me in a very good spot . . . those people conflicts and challenges are the most difficult. You know that’s what takes it out of you and can be so painful at times and difficult and time consuming.

The transition took place about two years into his role as senior administrator. Warren served for two years under Gage before the transition took place. He reflected on how the transition leads to a situation almost like starting a new job position. He was learning how to carry out his responsibilities and then he had to relearn how to work with

a leader on a very personal basis, “their personality and idiosyncrasies and how they prefer things and how they’re going to run things.” This part of the learning is significant but Warren observed that there is also the sensitivity that the successor has in the transition.

Don’s the new leader. He’s trying to figure out his new role. He’s trying to balance all the pressures that he’s now under. He’s trying to move things forward momentum-wise but not tick off . . . 10,000 people. So I think, in retrospect, I think that made him a bit more . . . what’s the best word—sensitive—however you want to say it—to decisions and so on.

So I think, you know, the leader he is today, the freedom he gives somebody in that role today is probably different than . . . month one in the transition. So I think that kind of underscored and maybe added to the pressure of the senior administrator role which was just kind of weird timing.

The movement from serving with a long-tenured, experienced leader to serving under someone for whom the senior position is new created conflicts and frustrations.

It may have taken me a year and half or two years to kind of figure out my role and kind of get used to that anyway.

So that was kind of weird, just up and down and kind of navigating through all that and trying to support him through that and do things in a way that didn’t make him uncomfortable but at the same time saying, “Okay. You know, am I leading this or am I not or how do we do this?”

Warren said that the nature of transition contributed to this ambiguity. He did feel that the more the senior pastor can transfer authority to the administrator and encourage people to deal directly with that individual, the less confusion there is for staff. If the senior pastor does not, it encourages staff to “jump levels and go right to him on issues and if he lets them do that then that’s really destructive.” Don has been effective at this. Gage’s pastoral nature pulled him into situations particularly if a person said, “I got a

problem, Gage, I really got to talk to you,” he would feel guilty if he couldn’t meet with his staff. This meant that Gage’s schedule was fuller than it needed to be.

Staff Changes

The confusion as to the administrator’s role and Warren’s declaration of desire to return to a preaching ministry led to a discussion five months prior to this interview with Nate, Don, Karl and Warren. They concluded that if another individual is simply placed into the same frustrating, ambiguous structure, three years later they would be saying goodbye to another leader. The senior administrator role was created as a intermediary between the senior pastor and the leadership team. There was “a bit of a gulf between the two.” The leadership team was on Don’s team but actually reported to Warren.

There’s a difference in being on his team and “being on his team,” but they weren’t. They were on my team . . .

I’m the guy meeting with them, one on one. I’m the guy meeting with them once a week. There was this disconnect between senior leaders and senior minister. And it just didn’t—it wasn’t healthy.

There was a layer between the senior pastor and the leaders that created this conflict. Rather than assign eight more direct reports to Don, the decision was made to form a smaller team that would report directly to Don. The team chosen has a diversity of skills, experiences and tenure at Covenant Church. This did mean that individuals formerly serving on the leadership team were informed that they would not be serving at this senior level.

Leadership (Elder Board) Transition

As Gage neared his transition he gave Don increasing freedom to influence the elder selection process. Warren reported that Gage recognized the importance of Don

identifying the individuals that he most wanted around him and that this transition needed to take place prior to Gage's departure. Warren felt that the forced rotation process was crucial to the addition of new board members. He thought that the timing of four or five board members all being in place one year before the transition and then four long-term members leaving the board at the time of the transition created a balancing of experience and fresh perspective. He thought it would have been foolish to seat an entirely new board at the time of the transition. He also thought it would be difficult for some who had served with Gage for twenty-five years to transfer loyalties.

Conflicts and Challenges

Warren observed that any time there is a transition from leader to leader there are changes and the perceptions of change. Some things have changed. Many things at Covenant Church have not changed, yet there is the perception of change at a broader scale than has actually occurred.

When somebody complains about a change, they might lump in, "Well here are four or five other things that have changed that are similar," so Don will get blamed for changes that were made long before he was the boss . . .

It's like . . . all these changes and half of them aren't even his deal so you know in that sense the guy can't get a break in some of those circumstances.

The Cumulative Effects of Multiple Changes

Certainly the change in senior pastor and the changes in the board were significant. Warren rehearsed the account of the changes in the atrium and how the decisions were made under Gage's leadership but did not get implemented for various reasons until Don was the senior pastor.

Those are the types of things that kind of get folks stirred up at times . . . I think people sometimes process their grieving of a leader leaving by . . . taking some of those changes hostage and saying, “Okay, here’s the real problem,” or whatever.

So that kind of manifests itself sometimes in that complaining spirit when really it is just, “I’ve been here for forty years and I LOVE THAT MAN and he’s gone now.

Yeah, there have been a couple of bumps in the roadway there.

Changes in the atrium provided a focal point for some of the changes in leadership style and ministry philosophy. The older audience viewed the installation of a bookstore and a coffee house and the modernization of the colors and carpets as a questionable use of funds as well as questionable priorities for a church.

The carpet choice was . . . oh goodness. You know who would have thought but for some reason people really fixated on that . . . It happened to be a lot of the older folks weren’t happy about the renovation anyway so they just hated the carpet. THEY HATED IT . . .

Are we really talking about this? Disappointing.

Many of the church body responded well to the changes as well in a change of direction for another major construction project. The elders communicated effectively and were available for questions. People saw the logic in the change but there was the cumulative effect of multiple changes that was unsettling. “I cite that not because it was all that significant but perhaps in some people’s minds, it was kind of one more thing that they were . . . stacking up.”

Warren reflected that some of the changes could have taken place earlier but there were complexities in doing things earlier. He speculated that the changes might have made Gage uncomfortable and “why would we want to do that to the guy?” One example he gave was regarding the move to much more informal dress on the platform.

Warren observed that Gage was and is a very formal dresser. “Gage is as comfortable in a suit and tie as I am in my pajamas.” The new leadership could have asked him to stop wearing a tie two years before he retired but “why would we want to change Gage? That’s the stickiness you start to get into.”

Other Contributing Factors to Conflict and Challenges

There were “pre-transition detractors” that predicted that when the transition took place, “Hey, the bottom is going to drop out of this and the budget is going to tank and attendance is going to tank.” Warren acknowledged ebbs and flows in these areas but on the whole there has been almost no difference. In many ways there has been a renewed sense of excitement because of Don’s emphasis on serving. “In a lot of ways there are parts of the congregation that kind of came alive.” The vast majority of the congregation has responded “extremely well” but there is the “really loud minority, who . . . depending on who you listen to . . . you could feel really bad about this.”

Warren filled in some details of Don’s fireside chat with the more senior adults of the church, “really masterfully done . . . really done well.” Don sought to accommodate the needs of everyone but also help the senior adults see a more holistic perspective of all age groups as well as his vision for the ministry. There were elements of empathy, vision casting, and gentle rebuke. I think people left there going, “Hmm, did we just get a spanking? I don’t know, but I loved it whatever that was. I loved it.”

Warren’s Counsel to Other Churches

His first counsel was, “Be yourself. Don’t assume that the way that Covenant Church developed a transition is the desired way for all churches to conduct a transition.”

He believed that there are some lessons to be learned from Covenant's experience but a church needs to be consistent with who it is. Second, Warren believes that the predecessor should be the one to initiate conversation about succession, particularly if he/she has had long tenure. There needs to be a sense of permission to talk about the inevitable well before the transition takes place. A plan needs to be made. Not only does the church need to talk about it, the predecessor needs to begin to think about it and talk about it.

Third, the predecessor should leave before he/she must leave.

I'm sure you could cite more churches than I could . . . sizable ministries where . . . the pastor is late sixties, early seventies, and has no interest in discussing what the transition is going to look like. . .

I hurt for those churches because in many of those situations people are eager for a bit of a new day. And what the leader has done, is he has waited so long and he has refused to . . . accept reality to the point where now there are tons of people wishing he would leave.

That can be avoided by just a little extra integrity and a little less ego on the part of the leader.

Gage has got many more years of great ministry to go but he was wise enough to say, "You know I'm going to go while everybody still wants me to stay. I'm not going to wait around" . . .

I'm sure he got a lot of this, "Gage, you got ten years to go man. What are you doing? You've put forty years into this place and you still got plenty of time to go. But he was smart enough to say, "You know what? It's time."

Finally, the predecessor should leave the church. "When you go, go." Warren recognized that for the predecessor and his family, it is very difficult to leave the relationships and ministry that have been such a central part of their lives. "At the same time, it's really hard, I think, on people and the successor if you're sitting in the front row for the next twenty years."

CHAPTER 6

NARRATIVES OF TRANSITION

Southpoint Church

Southpoint Church was one of several churches founded by Gary Matthews. He founded the church in a major metropolitan area. The church first met in a commercial warehouse. The church has experienced growth to more than 2,000 and has relocated three times to accommodate the growth. The church is characterized by a high level of focus on learning and serving in the context of close relationships.

Gary Matthews—Founding Pastor and Predecessor

Gary founded Southpoint Church in the mid 1980s. He has served as the founder of several churches, an academic and founder of several training and media organizations. His “form” of church expression has led to a national movement of like-minded churches. Gary was in his early seventies when he officially transitioned out of his role as senior pastor.

First Conversations Regarding Transition

Gary remembered first suggesting to his elder board that he was contemplating retirement at age sixty-five. They strongly urged him not to retire but to keep going as long as he was able. His response was that he did not want to outlast his time and tenure but as long as he was healthy he would continue to serve. He had watched other pastors who had struggled to let go and stayed too long in their church situation. Gary established a guideline for his life and ministry.

When I need the church more than the church needs me, I've stepped over the line. And as I had observed pastors who outstay themselves, it came very clear to me who needed the church more . . . I did not want to get into that psychological situation where my self-image and who I am is based on my role as a senior pastor . . . any honest [person] who has any self-awareness at all knows when that happens.

His goal was to continue as senior pastor until age seventy-five if he remained healthy. Mark, the chairman of the elders, proposed that if Gary was going to step aside at age seventy-five, then all elders should have a mandatory retirement at age seventy-five.

The Succession Process

Gary's style of leadership was to share preaching responsibilities with four or five individuals on a regular basis. The congregation responded favorably to the teaching team. Years before Gary's actual transition one of these staff members, Bilford, proved to be quite exceptional. Gary believed that Bilford would become his successor. Bilford was an outstanding teacher, writer, and leader. He mentored the younger leaders on Southpoint's pastoral staff. Ten years, however, before Gary's actual transition, Bilford left to start another church about one hour away from Southpoint's geographic location.

Desired Traits in a Successor

When questioned about the qualities desired in his successor, Gary said that someone who understood and was committed to Southpoint's philosophy was the starting point. He believed that if the individual was to serve within the church and under his leadership that loyalty was crucial, someone who would not pull a power play. The individual needed to be trustworthy. Ideally, the individual would be someone who had served within the church for an extended period of time. Southpoint has an extensive

internship program that has produced a majority of their current staff as well as Gary's eventual successor.

Selection of a Successor

In time, another young leader, Jerry, began to emerge as a potential successor. Members of the congregation began to approach Gary regarding Jerry's speaking and leadership.

People were coming to me, all voluntarily and saying, "You know, Gary, there's your successor. When you're ready to step aside." There was no indication they were saying, "Gary it's time for you to step aside." They were just simply saying, "If you want my opinion, there's a guy you need to watch."

It's interesting that my son, years before, who had studied with Jerry—he was on our staff with youth ministry and he came to me—he was taking a course with Jerry and he said, "Dad, there's your successor." Which was significant.

Talk within the congregation continued to grow. Jerry took on increasing responsibilities. One day Jerry spoke with Gary regarding the difficult situation in which he had been placed.

"What do I do with this Gary?" People were coming up to him and you know, as people are curious and they'll say, "How old is Gary? Do you know something we don't know? In essence what they were saying is, "Does Gary have his eye on you to be his successor."

Well I knew that we had to get out ahead of that. That was not fair and it wasn't malicious, so I went to the elders and I said, "Here's what's happening."

Before I did that I went to elders one-on-one, had lunch or whatever, breakfast. I simply said, "Who do you think should succeed me in seven years?" [This] because I would've been seventy-five. "If I go until seventy-five, that's seven years out. Do you think there's anyone on staff that would succeed me. And every one of the guys basically said, "Jerry."

Then I went to every one of the staff guys basically that had been preaching plus my executive assistant and I said, "Who do you think should replace me in seven years?" And every one of them said, "Jerry,"

which I thought was significant even though they had been teaching and preaching as well.

And so I told the elders what was happening—that people are coming up to Jerry and I said, “We just got to get out ahead of that.”

The elders informed the congregation that they had a seven-year plan for the leadership transition. They indicated that Jerry was a strong candidate for the position but indicated that this particular decision had not been finalized. Gary believes that announcing the time frame and the potential successor gave the congregation “a real sense of security . . . seven years is a long time.” He does not remember even one negative comment from anyone in the congregation regarding this approach. He believes that the congregation was “very pleased” with the proposed action.

The Transition Process

The announced timeline and potential successor led to the implementation of changes regarding Gary’s day-to-day leadership. He believed that Jerry was the right person to succeed him but that this belief would be proven or disproven over time.

I think that there was a sense of security that the senior pastor and the founding pastor wasn’t just all of the sudden just going to leave them. And I began to delegate more and more responsibility. Jerry and Chuck (executive pastor) came on the elder board.

One of the first things I asked them to do was to lead the whole staff through an alignment process. I think that was about a two-year process and I just became a participant and watched the process.

And it wasn’t that we were having serious alignment problems. It’s that we didn’t want to have serious alignment problems. But the fact is that as a growing church, already silos developed and partitions and then psychological partitions—no uh purposeful competition or anything—but Jerry was able to take us back to all of our core values—to work through our core values, to evaluate our own ministries, bring them in alignment with an overall corporate objective.

And so he really began to develop his own team. I made it very clear. I said, “One of my goals is to build Jerry’s team. He took that seriously as well and so consequently that began to happen.

Jerry had people around him that he was consulting and working with and of course basically leading the whole alignment process. He was leading the staff, developing credibility with the staff. They appreciated Jerry which I think was all a part of the groundwork that helped to have a successful transition.

Jerry led the staff in other areas and was speaking about half of the time in Southpoint’s weekend services. The congregation and staff had developed confidence in Jerry as a communicator and as a leader. Gary felt secure in Jerry’s integrity, loyalty, and personal communication. He did not sense that Jerry was seeking to push him out. One day, Mark, the elder board chairperson, asked to meet with Gary and Jerry. Mark was on the church campus on a frequent basis and shared that he was beginning to sense insecurity and confusion on the part of the staff as to who to go to for leadership issues and that the transition timeline needed to be accelerated.

A second conversation provided Gary additional confirmation regarding the need for an early transition. Bilford, Gary’s original choice for successor and an area pastor, sat down with Gary. Bilford told Gary that in three and a half years eighty percent of the transition had taken place and that Gary needed to accelerate the time table. Gary also shared that Jerry had written an article on Southpoint’s succession and that people around the successor start putting pressure on to culminate the transition more quickly.

They could feel that as well. And it’s that little dynamic that in the secular world if you were a CEO and you step aside, which I hadn’t done, but you’re still hanging around, trying to influence the situation but paralysis begins to set in to the organization.

That was another thing. I have a very close friend, very astute guy in the business world, and we were talking one day—we were having dinner with them. And he said, “You know, Gary, let me tell you . . . I’m

observing here—there’s a little paralysis setting in and it’s just because you’ve given so much trust and responsibility to Jerry. What’s happening here is that Jerry has emerged as co-leader.”

Unknown to him at that time, I’d already made a decision. That was just an affirmation. But basically it just dawned on me that, my job was over. I mean, I had achieved my goal and to prolong it would just prolong the situation.

I knew at that point in time . . . if I had stepped up and taken more leadership to clarify with the staff, “I’m in charge here, you can be secure about that,” they would interpret that one of two ways. Number one, Gary won’t let go which would not have been true. The other interpretation which would be worse, “They don’t trust Jerry,” and that wouldn’t have been true and people would try to see hidden agendas and “What’s the story behind the story.”

Gary approached Jerry and Chuck regarding an accelerated transition. He knew that the two of them had dreamed of working together. Jerry needed an executive pastor. The timing was right for both of them to be promoted into their new areas of responsibility. Jerry would receive the executive level leadership from Chuck that the church had been needing for some time. A relocation of the campus was in the planning stages. Gary had planned to lead the relocation process and then “hand Jerry the church debt free or whatever or virtually in good shape.” Gary shared with Jerry and Chuck that he believed that his job was done and that Jerry needed to lead the church through the relocation process. “To be honest to give up that burden was no problem whatsoever. I’d been down that road a couple of times and it was exciting but I felt fresh blood and new energy would help with that.”

The elders were shocked initially by the proposed schedule but worked through that. They informed the congregation and Gary told his story concluding with “I feel like it’s time to pass the baton.” Gary believed that the majority of the congregation understood the need for change and felt that seven years was too long for a transition.

Gary stepped aside and began to give his time fully to a national church training center. He retained his office on the church campus. He told the elders, staff and congregation, “I love all of you but don’t come to me and talk about the church.” He felt that almost everyone has honored that request. “I don’t think you could ask for more in terms of the way its worked.”

Helping the Successor Succeed

With Jerry’s assumption of the senior pastoral position and his leadership of the capital campaign for the relocation of the campus, Gary and his wife made a public financial commitment to make a strong statement about their support. Gary said that he offered strong support and public affirmation. He observed that Jerry “did a fabulous job” meeting with individuals and small groups of people. The financial goal was exceeded by more than ten percent. The successful completion of this challenging task added to Jerry’s credibility but Gary believed that his initial endorsement was an important part of Jerry’s success.

I think Jerry would acknowledge the fact that I handed him a good situation. And the fact that I believed in him and made that statement and stood behind him and we were going to be supporting this financially ourselves—we believe this is the way to go—people trusted us. I think that trust was transferred to Jerry but he did such a great job.

Challenges in the Transition

One of the significant challenges was the change in leadership style. Gary was very hands on and very accessible to all staff. Jerry hired Chuck as the executive pastor. Chuck became the primary leader connecting to the staff. Unlike Gary, Jerry did not choose to be involved in much of the day-to-day management.

That was a different deal and I think took staff just a little while to get used to that. I remember sitting down with Jerry one time cause I knew how Chuck felt. By the way, that's another thing—anything I communicate, I communicate with Jerry and Chuck and I do that very sparingly. I feel they trust that. I feel tremendous trust on their part. I feel they've decided I've earned it.

I did sit down with Jerry once and say, “you know you need to be more present with the staff. They need a pastor not an illustrator.” And I said to Chuck, “That's no reflection on you, Chuck, because you are dealing with all these executive issues and you can't be the pastor just by virtue of your roles at the staff.”

Jerry was very positive about that and they've made adjustments on that and the staff has made adjustments. They know Jerry's schedule. They know the pressure on him. I think he's very vulnerable with them.

Another challenge related to changes in the preaching style and worship format. Gary believed that people appreciated Jerry's unique style. They were accustomed to it prior to his becoming senior pastor. He brought a greater focus on reaching out to the community in nonconventional ways. Gary believed that this was one of Jerry's strengths. Jerry also targeted the younger generations and has sought to create an environment and style that is compelling. Gary acknowledged that the changes resulted in the loss of older adults to another megachurch in the region that was more traditional in its worship format. He said that Jerry was sensitive to the concerns of the older generations but not controlled by them. The elders have been very supportive of the change of the direction. Gary speculated that although some in the church have “felt a little discomfort,” their belief in Jerry and his vision has caused the majority to stay at Southpoint. Jerry has challenged the congregation that “it's not about us, it's about reaching other people so let's not let our own needs get in the way of the greater need.” Gary said that the unhappiness of those who had been loyal to him was ultimately not his

issue to resolve—it was “Jerry’s and Chuck’s and the elders.’ So I just committed that to the Lord and didn’t comment.”

A third challenge related to stepping out of the planning and decision role after so many years as a senior pastor. Due to all the activities in which he was involved in his retirement he claimed that he didn’t feel loss or grief. He acknowledged that it was a strange feeling to see the younger leaders planning the future while sensing that some of them were ready to have Gary step aside so that Jerry could lead. He didn’t believe those sentiments were malicious, but sensing that was a bit painful.

The Predecessor’s Preparation for the Next Chapter of Life

Gary felt very prepared for the next chapter of his life and said that he would not have done anything differently. His national church leadership training center had been a significant focus in his life for more than two decades. Early in his ministry at Southpoint, Gary set the organization up to avoid any accusation of a conflict of interest in terms of the use of staff and resources. The budget was separate but in reality the church was funding it. Revenues went into a special fund that provided travel funds to ministries overseas that could not afford to pay his way. Gary did not take any salary from the organization, again to prevent any conflicts of interest. He continues to write, to maintain a daily radio program, and to speak.

The primary change after the transition was that the church would no longer fund the organization. The church did provide office space free of charge. Gary continues to not receive a salary for his organization, that despite the fact that he is devoting more than full time to his responsibilities. “The guys kid me. Jerry and Chuck say I’m here more than when I was senior pastor because I was out on the field a lot more.” Gary

supports himself from retirement income and from income from special speaking engagements. He reports having more invitations than he can fulfill. “It’s not a problem of not feeling needed.” He is preparing and teaching more than he did when he was a senior pastor.

He hopes to continue for another twenty years. At the time of the interview he had just turned age seventy-four. “I think to me the greatest thing you can do at my age is to stay healthy physically, spiritually and emotionally. And I feel like I’ve been able to do that and I’m hoping that it will continue for a long time. I just say, ‘Lord, you’re giving me another day and I want to use it to the full.’”

Counsel to Other Churches Contemplating Transition

His counsel was directed entirely to the predecessor. He believed that the predecessor needed to spend time reflecting on his/her motives for remaining as the senior pastor. “At this stage of your life, ‘Why are you in the ministry?’” He didn’t believe that there was anything wrong in finding fulfillment in one’s work, but if fulfillment becomes more important than the effectiveness of the ministry there is a problem. He said that leaders need to continuously ask, “What’s going to help the ministry long range. If the fulfillment gets in the way and you hang on for fulfillment’s sake, then you’ve stepped over the line.”

He also said that some leaders hang onto their positions past their point of effectiveness by creating dependency and encouraging people not to let you go.

That’s a two-edged sword because it feels good to have people like you. But you’re enabling them to make them dependent on you by [allowing them to say] saying, “nobody’s going to be able to do what you do.” I bet I could have generated that for my own agenda. To me that’s selfish—it’s not thinking in terms of the kingdom and what’s best for the kingdom.

I would just simply say, “Look at that.” And then the person has to work from there with advisors that they trust . . . to listen to other people. And I did tell the elders. “Look, you need to help me if that ever happens. I think they sensed that freedom. I don’t think any of them felt like I was doing that.

I think what Mark [elder chairman] shared with me was basically, “This is a dynamic that has emerged and in a sense, Gary, you’ve created it by trusting Jerry and that’s all good.” Mark was not suggesting I do what I did. He was just saying, “You need to look at this. I sense that the staff didn’t know who to go to. They don’t want to offend you, Gary . . . they don’t want to do something with Jerry they shouldn’t do. They don’t want to put Jerry in a difficult position.

A final bit of counsel to predecessors was that he/she be very careful as to the degree of involvement they have in the church. Gary said that he and his wife attend a Friday night service and a home group and thus are not very visible. He calls Jerry “Pastor.”

If you’re going to stay in that church, you cannot do anything that distracts people from the primary leader and following that leader because otherwise you’re being divisive and you’d better leave. And you cannot let people put you in that position.

I think, by God’s grace, I’ve avoided doing that. I feel comfortable walking through and talking to staff and stopping by Jerry’s office. I’m available to those guys.

Chuck has told me, “Gary, anytime you want to tell me anything or say anything, please (let me know).” I’ve avoided that. Very seldom do I say anything and I think because I don’t say a lot, in a sense he wants me to say more. And I’m not going to take advantage of that.

Jerry—the Successor

Jerry served as an intern at Southpoint for four years while completing his graduate education. Following graduate school, he served as a senior associate pastor of a church in another part of the country. His role was to build a leadership core and to

develop organizational infrastructure so that the church could continue to grow. He returned to Southpoint as pastor of leadership development and adult ministries. Although he anticipated eventually serving as a senior pastor of a church, he did not return to Southpoint with the thought of becoming the church's senior pastor. He returned to the church because of his belief that he could address its long-term need of people development.

The church has always been built around small groups which is great, but there was no intentional process to ground people in faith, to solidify, not only their beliefs but also the lifestyle, not just head stuff but to orient their life around Christ and to be effective witnesses.

Observations on the Predecessor

Jerry reflected on Gary's key attributes as a leader. Gary's character is outstanding. "Just a godly guy who was humble, teachable, and freedom-giving . . . I wouldn't have come back if he wasn't freedom-giving." He was a developer of people, "not an intentional developer—he is more an opportunistic person who when he sees somebody he believes in or sees an opportunity, he loves to turn him loose." Gary was a person whose life and ministry was oriented in the Bible. He was exceptionally strong at addressing people issues quickly and thoroughly. Gary was a mentor, not in an intentional way but rather in a responsive way.

Gary is "more of a problem solver than a goal setter so he is not really one to think five, ten years down the road. 'Where are we heading? Where are we going? What is the plan? Are we on track or not on track?'" Jerry offered this, not as critique but as an observation of Gary's orientation as a leader. Gary was strongly relational but that relational bent meant that at times he would drop "everything if he knew one person had

an issue or problem or whatever and sometimes to an unfortunate place.” Under his leadership the church developed a reputation for its teaching, home groups and congregational unity, but the church was weaker in terms of its connection with the local community.

The Transition

Gary actually sought input from other staff members before he spoke with the elders. Jerry often spoke when Gary was gone for outside ministry. Gary came to rely on Jerry’s excellent communication and so the movement was from a teaching team to Gary and Jerry being the primary communicators. Jerry was active in staff leadership development and so naturally with Gary’s aging, congregational members began to ask Jerry about Gary’s plans for transition.

There were two big things that happened. One was I felt our staff was very siloed in ministry which is typical in the way churches grow and we needed to be built around a very simple model and strategy that we were all doing together and that would demand massive change. I named that to Gary and he saw that and kind of gave me the keys in a sense to say go ahead and let’s do this which I called it alignment.

And so I ran that alignment process which is quite a process. It’s not just rearranging what people are doing but in some cases having to change personnel and it is very far reaching and so it was a very big and challenging leadership role that he was very supportive of.

He never wavered which is nice because sometimes it would have been easy for him to blame because there was no proof of success when you are in the middle of it, why tear up something that is working pretty well? Why are we doing that? And yet he could see what could be on the other side and so he stuck with it which I appreciated. So I was in the role of change agent which is a pretty dangerous role to be in, but that was my role.

And then I began to speak more and more as well when Gary would travel. He traveled a good bit to speak and things. I started out in a rotation and then it kind of worked out to where it started happening more and more.

Because of those two things and as he got older, people started trying to second guess that, ask him, ask me, and Gary, he has a strength in orientation. He doesn't like to be behind. Those kinds of conversations – he likes to stay ahead of those conversations and so that made him really nervous that conversations about that were happening without him being able to inform the conversation, and that insecurity that is there he didn't want that as a problem to solve and so he got after it.

The Unfolding Transition

Jerry believed that Gary had in mind who the right person would be. Gary never developed an intentional process for leadership development in the organization. He did, however, instill the value of leadership development and leadership training such that he recognized that the church did not need “some hotshot” to be his successor.

The only question he asked the elders—he talked with everybody one-on-one—is “Who in our church do you see could take the leadership of this church?” There was no, “Should we question whether or not it should be somebody in the church?” There was no thought about that, there was no thought that I was aware of. . . he could easily have gone out and gotten some hotshot that had a proven track record, that was a lot more advanced than I was.

There were a lot of people he could have hired and yet honestly, just from a value perspective, I don't think it hurt him to think about who to hire, or for the elders to say, “Have you thought about looking outside?” Or, “Why are you just staying on staff?”

They never even asked that. It was just interesting. He talked with each one and asked who would it be and that's where I flooded to the top of the conversation list and he began to talk to me about that.

Gary met with Jerry once a week for mentoring. Jerry was the one who was intentional about this time. Gary told Jerry of his initial thoughts regarding the future. He didn't speak of the transition formally as he wanted to ask Jerry “officially” in the presence of the elders. However, he wanted to know Jerry's thoughts about a seven-year transition process.

My initial response was this is Gary Matthews saying, “I believe in you enough to mentor you and take my role.” So I said to Gary, “That’s what I am excited about saying yes to and with seven years that is a long time so it could be you will find somebody better, it could be that I decide to do something else. I don’t anticipate that but it could happen that far. It is just hard to see that far – seven years.”

I think I made him nervous at first when I said that. He said, “Are you saying you don’t want to do this?” I said, “I want to do this but you have to be a little bit over-handed in the sense that it is that long and so what I know I can say yes to is to be your associate, to be in the mentoring process with you with every intention of doing the plan, but knowing things could change and that feels really good to me.”

Jerry and his wife then met with the elder board at Gary’s house. In that meeting, each one of them gave their perspective about Jerry serving in the role and why they were excited about identifying him as the successor. Jerry said that there were two things that the elders said that were particularly affirming to him. The first was that they told him that they did not want Gary Matthews as their next pastor. They wanted Jerry. They were telling me to be myself. It was no statement against Gary but rather that they were not looking for a clone. The second thing that they said was that they were committed to Jerry and his wife as a family and wanted to set appropriate boundaries so that Jerry could serve for many years.

Jerry also appreciated that Gary was a “freedom giver.” Jerry did not feel like he had to fit a particular mold but rather was free to teach and lead in his own distinctive way. Their communication and leading styles are different but their values and philosophy are similar.

Surviving a Long Transition

The rationale for the seven-year time period was Gary’s desire to keep doing what he was doing until age seventy-five. His health had remained good. He was a “very

vigorous and healthy guy” and loved doing what he was doing. He also recognized that his age and Jerry’s emergence was creating questions about the future. The longer these questions remained unaddressed, the greater the possibility for problems. Gary designed the process to eliminate the questions and insecurity.

Jerry, on the other hand, was agreeing to the process more than the destination because the destination seemed so far out into the future. Prior to the official agreement, Jerry had entertained some succession thoughts and as the congregation raised questions it was a difficult situation in which to be placed. Then there was the announcement of a seven-year process.

I had to think of myself in that long of a process as an associate pastor, not as the next senior pastor because otherwise all the wrong things start happening. It was a challenge sometimes and I slipped into that, that’s when you make mistakes, but I tried to make it one of my first ... my first responsibility is, I am Gary Matthews’ associate pastor, my job is to be loyal to him and help him be effective and not try to subvert him so I can become senior pastor or get my way or whatever.

The initial responses to the announcement were positive. It was what people expected to happen. There was great love for Gary and yet the security of knowing that future planning had occurred. Individuals did contrast Jerry with Gary and his vision.

Again that is where I had to remember my job was to be his associate and it is about his vision, his leadership, his thing and quell that because people do that and they have all the wrong motives for doing that and there is no way to win.

I was considering whether I would say yes. I took a week off because I had been offered a job at the same time to go to _(location)_ to be the pastor of a really good church there. It was in the _(location)_ where I was from, two hours away from my family, it was a very attractive thing. I am really thankful I had to evaluate both, that I wasn’t just saying, “I guess so Gary.” I really had to think through it; that was a good situation.

Jerry believed that Southpoint Church would be the best for him to develop as a leader.

I ended up making a developmental situation for me. I really wanted that developmental opportunity that I knew I would never get any other way.

As he considered the opportunity, he spent time contemplating what challenges might rest before him in a long succession period.

I went away and I looked at all the succession stories in the Bible and the ones that went well and the ones that didn't go well and the one that impacted me the most was David's sons, not just Absalom, but . . . Adonijah? He had all these people around him telling him and so did Absalom, but all of these people around him, "Oh man, you are the one and he is out, he's no good."

It is so great to identify that before I said, "Yes!" What a danger and so I called it in my own head my anti-Adonijah connection. I didn't want to get sucked into that and it would be easy to do and it went terribly for Adonijah and it went terribly for the nation and terribly for David and there is no way anybody can ever win even though it feels good to hear all those people say how great you are and how much of a goober that other guy is. There is a part of you that likes that but actually I was very appreciative I guess for that on the front end for God to put that in the book.

Jerry said that successful, lengthy transitions are very dependent on the character of the predecessor and the successor.

That is why it is so fraught with, it is going to bring out whatever, it is so fraught with character challenge on either side of that. I still think it is hard to be the one giving it away. I don't know yet. I just have to imagine it is, but still huge challenges either way.

Indicators of Readiness for an Early Ending to the Transition

From the very beginning Gary was committed to building Jerry's leadership team. Jerry was leading the staff and organizational realignment process. In the middle of this, Gary instructed Jerry to build a team around himself, keeping his gifts, abilities, vision and future in mind. At the same time Gary instructed his long-term team that they would

need to take some steps back to allow the new leadership team to emerge. Jerry felt that this was a challenging part of the process of change.

That stage of it he (Gary) didn't struggle very much and people around him had been very central, a couple of those people did because they were displaced. They didn't really know what that meant for them, how to behave or what to do, so you had that going on, the newer emerging thing getting a lot of traction relationally and a lot of excitement about the future. There were just a couple of people who had been very significant in the organization who were now more trying to focus on Gene's external ministry with him – a little awkward.

So then you have these people ready to run right off into the future and you get them all together, you point them in the direction and say let's go, let's wait a few years, let's wait five more years, or six more years, and it just got really painful.

People knew stylistically and heart-wise where I would run but they also knew where Gary would and just which way do you go. It wasn't so much a named thing that Gary wants to do X and Jerry wants to do Y, it was more just a heartbeat and so which heartbeat do you really follow here?

It got to a place where it really became like a co-pastorate where both of us were exerting leadership and yet it gave an identity crisis to the staff and in some ways to the church.

Jerry reflected that transition “will take on a life and timeline of its own. Be sensitive to that and be flexible. The exiting pastor will be releasing authority over time and when a co-pastor situation approaches it is time to pull the trigger.”

Public communication was another arena in which the need for an earlier transition became evident.

I was speaking half the time, so half of the time it was one style of communication, and at first it was really good. At first, it was refreshing, it was kind of neat. You have Gary's thing and you have Jerry's thing, and we like both, they are different, they are great.

But after a little while what would seem like an advantage started becoming like schizophrenic almost. “You have this style of heartbeat and this style of heartbeat, which one are we?”

I think everybody started feeling that and then people started naming it. Staff people started naming it and church people started naming it. Again, it was hard for those people to name and I named it to Gary. It was just hard. You talk to those people, you talk to Mark and Max and some other people.

People have huge loyalty to Gary and love him and just saw we can't continue like this and I think in some of their minds it wasn't necessarily . . . I think their preference was we need to make the transition but just more than anything we need to do something.

Gary's initial response to what was unfolding in the congregation was that he had failed—he was not providing enough leadership or that he had done something wrong. A conversation with Bilford, the first potential successor, was instrumental in Gary's evaluation of the status of the transition. Bilford met with Gary and drew out a timeline with a trajectory over that period that was a straight line, indicating an evenly unfolding process. Jerry reported Bilford's conversation with Gary:

What happened is the way you did it, with building his team, turning over alignment, the whole thing, it just had this huge steep curve that shot up, got everybody ready real early, and now you have this plateau line that continued.

Jerry believed that Bilford helped Gary to see the accelerated time table as a success not as a failure.

This is successful, this is something you wanted, you just did it sooner than you thought and it is because of how you are wired. It is actually a good thing, it is something to celebrate, you are not abdicating, you are actually empowering, you are actually doing what you said you were going to do.

Jerry concluded:

The lesson I take from that and I think Gary would agree is that the succession process, it starts taking on a life of its own and if you ignore that you can ignore it to your peril.

Looking back I think it is better to state a longer time line and make it shorter. You can always make it shorter and win. I mean it is a win. It's like, "Wow, how cool is that!"

But you can't ever make it longer and so when I get there I don't think it will be seven years but I will announce a longer timeframe with every intent for it to be significantly shorter than that and just see what the life and timeline of that is naturally.

Completion of the Transition

The conversations with Gary and others occurred in October and the first part of November. With counsel from the elders and several other individuals Gary made the decision to accelerate the transition that was now three years old. Jerry said that with Gary's problem-solver orientation he wanted to solve the problem right away.

He called me on my cell phone. We were out taking a family picture and I was out with my kids buying shoes. You know family pictures are disastrous. He said I need to talk with you, "Can you talk?"

I said "No, I am in the middle of the family picture. I will get killed if I ... I just can't but how about in the morning for breakfast."

"Are you sure you can't talk?"

"Yes, I am sure. I can't talk."

And he said, "I tell you what, let me just tell you one real quick thing. I think it is time for you to be senior pastor. I think we need to do the transition, we should probably announce it next week and then go into effect two weeks after that but we can talk about it tomorrow."

I said, "Whoa, wait a minute. Okay, let's talk a bit and then we'll meet in the morning. Okay, you got my attention. What is going on?"

He wanted it to be that quick. He is that way. Once he makes a decision, it's not "Let's drag it out." He doesn't like sitting on things like that and it was also a way for him to get back out front in the process and so intuitively that is how he is wired. So we ended up doing it in January.

Major Actions in the First Six Months

Jerry took three weeks over the holidays leading up to the transition and then launched a message series on the purpose of the church. There was a big publicity build up for the series and much creative energy invested. It created a lot of “excitement, energy and focus.” Jerry and the elders decided that this was also the time to announce that the church would be relocating. The congregation was invited to pray and search for property. The leadership had never communicated the possibility of relocation to the congregation so this was new and very big. Jerry’s groundwork over the prior three and a half years in building the staff, restructuring the church, and sharpening the purpose of the church were instrumental in a high level of endorsement for the proposed move.

The organization was already built around that model of ministry, we already had leaders around who shared the same vision for the community and God was also stirring and really at work at a grassroots level of the church saying what about our community, what about right here. And so it would have been an uphill climb if that wasn’t happening, if there wasn’t this grassroots thing stirring and people heard my heart too. I was preaching at the time so that was already, people knew my voice. It gave time for the sheep to hear the voice of the shepherd, they knew my heartbeat, they knew who I was, whether they liked it or not, they at least understood it and could make a decision as opposed to trying to figure me out for the first six months or first year or even two years and try to figure it out. There was no mystery.

Six months into his tenure as senior pastor, Jerry laid out a new vision for the church overall, including the focus on engaging with the local community. He felt that the alignment of the staff and restructuring of the ministry were the most difficult tasks and that those had been completed prior to his commencement as senior pastor.

Challenges in the Transition Process

Challenges existed with the predecessor, successor, congregation, staff and elders. Jerry felt that challenges with all those impacted by the transition was a normal part of any transition.

Challenges for the Predecessor

Jerry felt that Gary did many things well including very public support of Jerry and the relocation project. Gary and his wife made a significant financial commitment to the congregation and actually identified the size of their commitment to answer any questions as to the level of their support for the new leadership team. There were several other positive areas that at the same time presented challenges.

Gary and his wife stayed within the church. He made a commitment not to talk with people about what was going on in the church. He has done well in keeping that commitment. Two or three times he has violated that, but then been very responsive to Jerry when confronted with the situation. A more difficult part of their staying within the church relates to long attending friends of theirs who have grown unhappy with the changes in the ministry. Gary has struggled more than Jerry regarding people who have left the church over differences.

It continues to be hard for Gary . . . it is harder on Gary than most people because he is highly relational. He takes those things very personally. We have very different personalities. With me, I am much more concerned about the direction we are going than that people can't make it. See you in heaven. With him he is not that way.

If you were in our church and he found out you were leaving he would meet with you for 30 hours this week trying to resolve whatever it is. And what I saw over time . . . was in the short run felt better but in the long run, it just wasn't good. The person ends up leaving anyway five years later with a lot of damage in the mean time, unless sometimes things can

be worked out. I am not talking conflict, I am talking more philosophical, directional orientation and things like that.

On the positive side what I learned from that is that on the conflict side I am much more hands on than I would be naturally because of him, not so much philosophical or direction-wise. Once that is the issue it is easy for me to say go somewhere else, it is okay, but he just can't do that.

So he will still—every once in a while—call and say I hear so and so is leaving and I would like to try and do you think we could? And I say, “Well maybe, but the truth is Gary not everybody is going to be able to do this and that is okay with me and so I will tell you what I am going to tell her and yes, I will be happy to meet with them.” That doesn't happen very much, but it does occasionally.

There is the challenge of growing out of touch because of a lack of weekly involvement in the church. Particularly when Gary speaks, the staff feels that he is out of touch with what is currently being emphasized in the church as well as how things are currently being done. Jerry continues to try to have Gary speak once or twice a year but Jerry believes that it is becoming harder for him to do that as the congregation grows and changes.

Another one of the challenges with having the predecessor on campus is just his mere presence and occasional uninvited input. Jerry tries to listen to him because he is godly and wise. It is difficult to listen to his counsel and then tell him, “No, this is the direction we are going.” There is the sense of disappointing someone who has been very important as a mentor. On the positive side, Jerry does have someone to go to when there is a major issue. Part of the struggle is generational. “I think he is in denial about the struggle he is in. I don't know how to help him there. I really think it is that generation.” Gary's extensive outside involvement has made his presence more acceptable.

Were it not for that, it would be disaster. If you have somebody with that much energy, that much drive, and that much you know, it would be a disaster for him to be here and not have that external outlet. He would be

in my office all of the time, it just wouldn't work and so that is the biggest thing with these guys who have started these churches and stuff. They have to know what is next and it has to be big and they have to focus on it and get with it. So that has worked well. Also, the thing I am really thankful for is he really is available any time, not just for input.

The challenges of this have caused Jerry to think through the whole question of whether or not a predecessor should stay within the church.

Having him around obviously from a wisdom perspective and all of that is great. On the downside it does give, even though he has been good about, he really has been, for his personality especially, good about not talking with the people, still it gives people the opportunity to do that and they do.

He sometimes tries to rescue me when he thinks I need rescuing. Maybe I am deluded but usually it's when somebody is leaving the church and that's not helpful. I don't need him trying to win people.

When he has come back and you know he just operates and when he does do stuff with us. I don't know how you would do it any other way but it just sort of goes into the old mode of the way it was and it's not that way anymore and it throws our team and him for a loop. It has made me ... I think ideally it should work to where the way we are doing it is the way to do it.

However, if you ask me right now: "Would I do it that way when I leave?" I would say, "No, I will leave. I will be available to the person. If you ever want me to come and do anything, and you don't have to, if you never call me, I really will be fine." I'll go sailing or plant a church or whatever I am doing at the time, but I am just not going to do that.

Congregational Challenges

After the seven-year transition plan was announced, some congregational members realized that changes in worship and teaching style were inevitable. Some left the church early on and some chose to wait and see what would happen. The church experienced significant growth in the first few months of Jerry's ministry. There was a collective sense of excitement and new life. Two groups exited. One was an older group that did not appreciate the music. This group knew Jerry as a teacher and knew that he

was Gary's hand-picked successor. One unexpected factor that helped this exit go more smoothly than anticipated was the launch of a church essentially targeting individuals over age fifty. The second group that exited was made up of "home schooling families with an attitude." Jerry's leadership forced this exit but Gary was still senior pastor at the time and so this helped mitigate the level of criticism that Jerry received.

Elder and Staff Challenges

A number of staff transitioned during the staff and ministry realignment. Jerry acknowledged that their departures were not as painful since many of them were not individuals with whom he had served. One individual undermined Jerry's leadership subtly. Jerry was not certain as to whether or not he was being insidious. "He was just stuck in-between two things he didn't know how to handle." Southpoint sent him out to help another church get started.

The elders were well prepared for the changes. They realized that congregational members have a decision to make when there is change. The elders sought to stay focused on their values that define who they are. "Once you add, 'This is who we are; this is how we are going about it,' is in itself divisive and . . . it forces a decision and so we talked a lot about that." There was one elder in particular who struggled. Many of his friends were struggling and some were leaving the church. The elders coached him as to how to navigate the process.

Counsel to Others in Transition

Counsel for the Predecessor

Jerry spoke of temptations that the predecessor and the successor experience in the course of transition.

For the exiting pastor, groups of people will try to hang on and convince you that the church needs you . . . that this is not the right time. They fear the future and will try to cling to you as their leader, their pastor. You can either help them leave you and cleave to the new, or hang on and allow them to stroke your ego. A transition killer is when the exiting pastor begins to manipulate the timing around his or her ego and desire to feel needed.

For the entering pastor, there will be groups of people who will try to align with you and convince you the time needs to happen sooner . . . that the church would be much better if it happened now . . . and they will try to begin to manipulate circumstances to eventuate a quicker transition. Some of these people probably have hidden agendas but some of them are just excited about what is to come and want to see it happen as soon as possible. A transition killer is when the successor starts to believe these people and tries to control or manipulate the transition inappropriately.

For either individual, responding to the groups mentioned above could drive a wedge between the two leaders. As much authentic positive communication as is possible in public and in private towards one another will aid in the transition. People need to see the predecessor and the successor honoring each other “consistently and authentically.”

Jerry spoke of his own conviction that when he transitions, he will not remain within the church. He acknowledges that it seems ideal for the exiting pastor to be able to remain within the church after transition but only if:

- He/she really can be supportive of the new leader;
- He/she never entertains complaints;

- He/she has no leadership role that casts a shadow, which probably means no formal leadership role;
- The new pastor is comfortable (with the predecessor's presence);
- The successor and exiting pastor work hard to maintain good communication and relationship;
- He/she understands the opportunity they have to continually express support for the new, even though it will be different (therefore challenging). This can be a huge help for the new pastor in change management;
- He/she is able to control their ego;
- He/she is able to let go and give freedom for the new pastor to change.

Jerry believes that the predecessor should disappear for a time, taking “a sabbatical or extended ministry tour at some point shortly after transition to give space for the new leader.” If the predecessor is staying in the church, the predecessor and the successor need to communicate regularly so that the predecessor is informed and not surprised by major decisions. The predecessor should communicate regular support and excitement about the new leadership team and the new vision. He/she should also expect that changes will occur possibly rapidly after his/her departure.

Counsel for the Successor

Jerry spoke of capturing the time immediately after a transition to introduce change. He believes that people expect it and “will allow a lot of change in that early period.” He said to be respectful and honoring to the predecessor but not to allow deference to him/her to slow the implementation of the “fresh vision.” “If you’ve done it

right up to that point, people are chomping at the bit to get going . . . the new pastor needs to be pedal-down right off the bat.”

Counsel for Leadership

The identification of the predecessor is under the general oversight of the board.

Jerry suggested that an internal succession “makes sense: in organizations that:

- Are healthy—where you want to perpetuate the current culture as opposed to blowing the current culture apart—where you want continuity of the culture,
- Have one or more viable leaders who can pull it off,
- Have in their culture a value of leadership development,
- Have an existing pastor whose ego can handle the shift,
- Have strong trust between congregation and leadership.

A transition plan for the board is crucial for the success of the transition. Jerry suggested that over time a new board be formed around the new leader. This transition ideally should begin prior to the exit of the successor. The predecessor should not serve on the board.

Chuck—the Executive Pastor

Chuck and Jerry attended one year of college together. Both of them attended the same graduate school, served together in student ministries, and were good friends. Jerry served as Chuck’s intern when Chuck was the director of Junior High Ministries at Southpoint Church. Chuck became executive pastor at the time Jerry became senior pastor.

The Transition Process at Southpoint

Chuck reflected on an occasion several years prior to the succession announcement. Jerry graduated with his Th.M., moved to another part of the country for several years, and then returned to Southpoint where he was serving as pastor of adult ministries. Gary, the senior pastor at the time, was increasingly speaking at other churches on the weekends. A number of staff members served as the rotation for the occasions when Gary was not available to speak at Southpoint. Over lunch with Gary, Chuck said, “I think it would be a good move to—when you’re out of town—instead of rotating so many of us, have Jerry do it more.” Chuck was one of those in the speaking rotation but he felt that Jerry was more gifted and skilled than the other staff members. This conversation with Gary took place four years before the transition. Chuck believed that other individuals were also observing the same thing and in time Gary “started going in that direction.”

Soon after these conversations Gary announced that “someday ‘I’m going to make a change—in seven years.’” It ended up being much shorter than that, but Gary had rationale for this time period.

Jerry was very young and Gary was still extremely energetic, still is. And I don’t think Gary felt that he was going to need to make a transition in three, four years and wasn’t sure . . . that Jerry would be ready in those three to four years. But all the signs said that Jerry had the potential to be that kind of a leader. And it was just more of, “Let’s give him time to demonstrate that, to grow in that role.”

Official Recognition of the Successor

A staff meeting was held in which it was communicated that Jerry’s title was being changed from “Adult Ministry Pastor” to “The Associate Pastor.” Southpoint did

not have an associate pastor at the time. And so Jerry was named as associate pastor with the intent of him becoming senior pastor at some point. Although the senior management team discussed the decision prior to the staff meeting, Gary and the elders made the decision. The “discussion” at management-team level was more an informational process than a decision making process. Ultimately the decision was announced to the congregation.

This is our intent. And we’re going to hold it loosely and just see how this goes but our intention is to go down this road but we’re not committing to it and Jerry’s not committing to it either . . . we’ll hold it loosely and see how things develop.

The Response of the Congregation

The overall response of the staff and the congregation was very positive. Chuck could not think of any staff member that had any issues or felt like, “Man, I can’t believe they didn’t ask so and so,” or, “I wonder what this person thinks about it.” It was really positive because by this time Jerry was preaching frequently and very effectively.

I think people in the church body really welcomed it and I think our staff did the same. Gary had given Jerry a lot of leadership of the staff and so it was just a very natural, obvious selection.

His preaching was really outstanding. He had increasing roles in staff leadership. (He did) all of the staff development—any studies that we would do or books we would read, we would do that under his leadership and Jerry would lead us through that process. Gary was a participant in it but Jerry was leading us and so he was leading the staff in that way.

Jerry . . . had already worked with Robert Newsome, writing much training curriculum and a lot of their studies and so he had a lot of credibility . . . He was thirty-three, thirty-four . . .

He was leading the adult team. He had—we had—changed children’s pastors and he had been responsible for executing that change as well and hiring another person. So again, “I think his credibility was quite high on the staff as well as in the church.

Challenges in the Transition

Many parts of the transition were effective. Gary's delegation to Jerry on leadership issues, staff issues, leadership development for the staff, and even the elders was "done exceptionally well." Gary's decision to designate Jerry as the primary communicator when he (Gary) was on outside speaking engagements was "done exceptionally well." The congregation and the staff were very comfortable with Jerry as a person and leader.

Confusion as to the central vision of the church. Chuck felt that the most confusing part of the transition was related to the vision of the church.

I think the vision and the mission of our church became more about a leadership transition than about where the church was going.

For that period of time . . . I think staff got a little bit antsy and I think people in the church were getting a little bit antsy with that.

I mean that transition is a huge transition so it's a big mission—but it is obviously not the mission of the church and so I think there was a number of staff people that began to get a little bit antsy with that . . . "Where are we going as a church? What's our emphasis? What is our clear mission?"

Confusion as to who was leading as the transition unfolded. Gary had given away many leadership roles. He had been effective as a delegator through his years but the transition was a confusing time for congregation and staff.

I don't think Gary wanted to lead—Gary had delegated so much over those years. I don't think he wanted to step in and just really lead because he would've been taking back some that he had already given away to Jerry and yet Jerry really didn't have the authority to lead completely and so I witnessed those guys doing a lot of dancing.

And often the absence of authority or the absence of Gary taking the lead, just led to, I guess we all, just kind of need to do our own thing for a while

and we're not all going somewhere together right now accomplishing this big vision, mission for our church.

I think more than anything that's what was hurting—probably that last year.

Seven years was just too long and I think Gary would say that too.

I think in that process, it just needs to be very defined of, “Here's the responsibility I'm giving you and here's the authority I'm giving you.” Those guys are so nice to each other . . . those kinds of conversations were awkward and hard for both of them. I found myself trying to help facilitate those conversations more than I even felt comfortable doing.

Awkwardness in Chuck's role. Chuck became the executive pastor when Jerry became senior pastor. In the first six months his position was called “a ministry director.” The rationale was that they did not want to confuse an executive pastor, an associate pastor, and a senior pastor. His responsibilities increased as Jerry and Gary had given him more responsibility. He was overseeing adult ministry, pastoral care, single adult ministry, and was about to be assigned oversight of children's ministry as well. Gary was “not fond of the executive pastor title at the time.” Within six months of Jerry's transition, Chuck's title was changed to “executive pastor.”

His first year in the role felt extremely awkward—more for him than for the staff. There was confusion as to who was managing the ministries: Jerry or Chuck. It was a “year of frustration” to Chuck. After about one year, the decision was made to separate a strategic team and a management team. Chuck would lead the management team and oversee all the staff. The strategic team would focus on global ministry vision.

I had relationships with all the staff and Jerry had handed a lot of authority to me—responsibility and authority but I think the most awkward thing in that first year was both of us trying to really settle into our roles and figure out what his responsibilities (were) as it relates to our staff.

Jerry really wanted to just hand all of that to me and the staff still wanted a close relationship with Jerry. Now Jerry had all these elders he needed to be spending time with. He had other people in the church—key leaders—that he needed to be spending time with. And he had sermon prep on a weekly basis.

So I found myself in that awkward position of: “Okay, I am supposed to lead staff meetings and supposed to lead staff development and even really be in charge of the church strategy and implementation of that strategy.”

But I found a lot of times staff were asking questions of, “Where’s Jerry? Why isn’t Jerry doing this? Why isn’t Jerry in here?” That was a common question, “Where’s Jerry?”

Finally he and I talked and we just “get” each other and so we would just talk about it and say like, “Man, I can just tell that staff is like, ‘Where are you?’ And I don’t think they understand all that’s on your plate. It’d be good for us to just sit down with the whole staff and let’s just talk about it.”

And so one day we did. We had this meeting where Jerry said, I mean basically it was, “I care about every one of you but I’m not going to be around a whole lot and I’m not going to be hanging out with you a whole lot.”

That didn’t go over real well but I think Jerry was smart in that he was really trying to almost communicate no expectations. “Please don’t have any expectations of me besides shaping the mission, the vision of the church; communicating on the weekend; working to develop the elders and that community of people; and then just being a functioning member of our church.”

Chuck said that Jerry and he “did a lot of dancing” that year. He finally asked Jerry to simply come to Monday staff meetings. His mere presence was perceived as a commitment to the staff. After the first year, Jerry began to attend staff meetings. Chuck always asks him to share something with the staff. Chuck invites Jerry’s input into important hiring or firing decisions and at minimum informs him so that the staff is aware of his interest. “It was just a weird dance that first year—it wasn’t because of Jerry but it was more me figuring out and the staff getting used to me leading all of that and not Jerry.”

Challenges in staff structure. At the time of Jerry's transition there was a senior level team. It wasn't a true management team by virtue of ministry oversight. Rather it was a group of staff who by virtue of their long tenure served on this team. When Jerry became senior pastor, Chuck formed a management team that truly oversaw all of the ministries. The composition of the team was not based on tenure but rather about the type of leadership role in which each individual served. If an individual oversaw a significant area of ministry with staff reporting to them, he/she was a part of the management team.

It took on a bit of a corporate structure rather than, "You've been here a long time so you get to have a say in what we're going to do or who we're going to hire or that kind of thing." And that was a big change.

The former senior level team had the nicer chairs in their offices. They had the bigger offices. They had the cell phones and the others didn't. And it was just messed up. And so we've tried to just do the opposite—even Jerry and me. We wanted to keep small offices. We wanted to just use old furniture that we had just to make a statement of, "Just because we're in the role doesn't mean we get the big office and the nice furniture and more benefits than you," and that kind of thing.

As this new team was formed, in that first year there was confusion as to who was really leading the management team. Chuck and Jerry formed a strategic team together that focused on the long-range vision of the church. Service on this team did not relate to an individual's role on staff but rather related to an individual's ability to strategize. The desire was to rely upon the elders for this but many of the elders were not vision-oriented people. The team was composed of a business person, Jerry, Chuck and two other staff individuals. This team worked with Jerry on the upcoming year's big initiatives and on initiatives for five years out. Their ideas would then be discussed with the elders. Again, this strategic team was formed after Jerry's first year as senior pastor. Jerry led the strategic team. Chuck led the management team and oversaw the staff.

The formation of the strategic team led to the removal of certain individuals from what had been considered the “senior” level management team. Some individuals struggled with the changes in their status as well as the changes of direction. The approach to ministry oversight was different under Gary.

It was a bit more ambiguous and loose then, though not tremendously, but not as aligned as it is today because today the strategic team—we work to craft . . . the strategy of our church and then as a management team we build ministry plans and implement that strategy and all of our plans are very integrated together.

And so integration is much stronger today throughout the ministries and not duplication, not competition for resources, competition for air time and that kind of stuff. That’s close to gone. It still raises its ugly head at times but the men’s people, or the women’s people they kind of understand, “This is where we fit in our overall strategy and that’s why we’re going to promote life groups a lot more than we’re going to promote this men’s study that’s available.”

There was one long-term staff member, extremely loyal to Gary and not a good staff fit for the changed format of ministry, who presented management challenges as the transition drew nearer. Gary brokered a deal with the board for a transition for this individual that resulted in three years of full severance pay at one of the highest pay scales. Jerry and Chuck were not invited into this decision and were not comfortable with the decision. That decision caused hard feelings because of the financial impact for the first three years of the new administration. Also Gary received full salary for the full seven years that he had projected for his transition (even though the transition took just more than three years). Although Jerry and Chuck supported this decision, the financial impact of the two decisions together was substantial. “You’ve got a ministry that’s growing and thriving and you really need to add another pastor at that role but you’re still spending one and a half times that pastor’s salary on somebody else that’s not here.”

One other challenge that needs to be mentioned was the confusion of roles and compensation for those who worked for Southpoint and also worked for the ministry organization that Gary founded. There was also a confusion of support for the ministry organization and for the church. Chuck proposed that there be clear separation for accounting and expense purposes. Gary strongly disagreed with this decision.

I remember him standing in the doorway and saying, “If you separate those budgets, you’re going to separate those ministries and they’re not going to be together and that’s the worst thing. The reason it’s woven together is because we want it woven together.

I just disagreed. I said, “I think we can be woven together in spirit and we can support you even better,” because there were a lot of people in the church that even felt like it was a little bit too screwballish. “When I’m giving, am I giving to Gary’s ministry? Am I giving to Southpoint?” I felt like we can actually protect him and his reputation if it’s separate.

Chuck and others encouraged Gary to form his own ministry board rather than a token board to help him in fund raising and advising of the next steps of the ministry.

Gary’s so much about vision. He’s got ten projects he could tell you about tomorrow that he wants to do but I think his board helps him tremendously in that.

But that was something that—I guess I forget about those days—that was a hard part of that transition. It was very behind the scenes but a very, very, challenging, difficult part and it was challenging and difficult for the elders. ‘Cause you do get into loyalty issues there and honoring of him and sometimes what you think might be best financially for both organizations might still feel very dishonoring to him. And that was some of the hard things . . .

As long as money keeps pouring in you could give. “Hey, let’s give you \$200,000. We’ll give you two hundred this year more. It all sounds good but once you start tightening the belt or doing a relocation project or whatever . . .

Challenges with the congregation. There were pockets of resistance to changes brought about by the transition in leadership. Some of the older members of the

congregation did not appreciate the changes in worship that were taking place. From Chuck's perspective the changes were not radical—from a very traditional style to edgy contemporary. The worship at Southpoint had always been a “blended type of worship service.” However, there was a definite movement towards a more contemporary worship style—at times “more edgy.” But there were other changes that fed the unsettledness regarding change.

Worship style was an issue and Jerry took a lot of shots for that—not really our worship team but Jerry did and I did. A lot of the older people—we heard a lot of times, “These young guys are just trying to change everything.” Honestly, I look back and I don't even remember all the big changes.

I don't feel like we—I mean we still are church-based on small groups; we still do large group, small group formats; and adult, children, youth and all those but we changed some staffing situations; we let our men's ministry guy go and that didn't go over really well with a lot of people. We said goodbye to him right at transition time.

We said goodbye to our counseling department—the entire department. We decided to outsource most of our professional counseling and just focus on pastoral counseling. That was a hard one. I was responsible for leading all of that. That was a tough one for those who were using that area. It was just a few people. I won't say a whole lot about that. They (the counselors) weren't used a lot. Our pastors weren't even sending people to them . . .

So we had pockets of resistance around worship, around some counseling, around some staff issues and resistance on staff changes . . . we didn't catch heat for Albert's moving but we caught it more from staff who knew the arrangement—that we were supporting somebody for the next three and a half years, they weren't happy about that.

The relocation of the church resulted in some fallout because some in the congregation believed that Southpoint was trying to be like another megachurch that grew larger and larger. “They heard big and they didn't like that.” For the leadership, however, it was about building bridges into the community and in fulfilling the vision

that they had for ministry. Some congregational members left because of the concerns about the loss of a family feel.

Other issues included teaching style, community focus, and home school issues. Gary was more academic and lecture oriented in his preaching. Jerry was more applicational, inspiring and humorous in his style. Some in the congregation perceived these differences as a loss of “depth” in teaching. These left for another new church in the area started by a nationally known Bible teacher. There was “fallout” over the greater focus on the community surrounding the church. Some perceived this as a de-emphasis on their needs and the needs within the church. Finally, Jerry took a stand against what he perceived to be the “isolationist, protectionist mentality” of the “home schoolers.” There was a strong contingency of those committed to home schooling within the church. Jerry disagreed with their stance, “The world is bad. We are good and let’s keep our good kids away from the bad kids.” When Jerry indicated that this posture was not the identity of Southpoint, some in the congregation left to find others more like-minded with their stance.

And it’s hard. It was hard for Jerry. I know Jerry really does like everybody to like him and wants everybody to like our church and I do too. We’ve had dear friends that have left . . .

As far as loss . . . I don’t know if we’ve taken the time to really talk about it a lot, but we lost some really good people—some great character people . . . even today I just heard of another couple that had left recently and I’m not sure all of their reasons, but I’m sure it was over the worship service more than likely and I think there is a sense of loss in that. We don’t talk about it a lot but we feel it and grieve it in many ways—just very privately of dear friends.

I’m more of that way than Jerry is. I think Jerry’s like, “Man, if you can’t get the vision, please go.” But we had really good people come in and sit down with both of us or individually and said, “Hey, I’m leaving and here’s why.” The killer thing is when they make up a reason and then you

hear from a bunch of other people, “They left ‘cause they don’t like you,” or “They don’t like your sermons,” or “They don’t like this thing about the church.”

There is a loss there and I mean losing some of good people that were really good leaders here. They multiplied themselves as good leaders. There’s loss there and that hurts.

Change in leadership style. Gary, the predecessor, differed from Jerry in terms of how he approached the elders with major decisions for the church.

Gary knew, when it came to major decisions for our church, Gary knew the decision that he wanted to have implemented and so I think when he approached those discussions with the elders, it was more of him sharing an idea and why he thought it was a good idea. And for the most part I think there was consensus around his idea. They might ask a few questions. They weren’t what people would call, “Yes men.” They’d poke a few holes in it and then say, “Okay, we’ll be careful here. Let’s watch this but yeah, let’s go ahead with it if that’s what you think we need to do.

Jerry approaches it—he’d still come proactively with a vision or an idea but I think probably because of his age and just inexperience and also a desire really to rely upon the elders, I think he leans heavily upon them to make those decisions rather than just approving his decisions. That was very engaging for our elders.

I remember the first elder meeting we had when he shared how he wanted to approach elder meetings. Those guys got excited because I think it reignited a leadership passion that they had for our church that they’d just not been living into.

The Predecessor

The time leading up to the transition had awkward dimensions. Staff came to Chuck or to Jerry asking, “Who is really leading us? What are we really doing as a staff right now and who’s leading that?” These questions became big questions. There was the sense that no one was leading. Teaching style differences entered into the challenges of change with some in the congregation preferring Jerry and others preferring Gary. The styles were different enough that some members of the congregation would call in to find

out who was speaking before either choosing to be in the services or deciding to invite a friend. Chuck, the executive pastor, said, “That just got really weird as to how it manifested itself in the church body. For the congregation, it was, “Who is speaking?” For the staff, it was “Who is leading?” or “Is anybody leading?” Chuck received many of these questions. In time he talked very bluntly with Jerry and Gary about those questions. Eventually he talked with both of them together.

I talked to both of them about those situations and just said, “I feel like we’re at a kind of a tipping point or of a pretty major transitional time that needs to be addressed somehow.”

Chuck describes this conversation as the most difficult part of the transition for him—sitting down with Jerry and Gary and telling Gary that things were not healthy and that the transition needed to be completed.

I am a person who cares about people. I am not the normal profile of an executive pastor. I want to disclose and let people know what is going on in my life. So talking to Gary, someone I so respect and admire and having to tell him that it was time to move on out of his role was really hard.

There were other individuals in the church that said that they were going to meet with Gary regarding the church situation. Chuck knows of several who did. He believes that hurt Gary. Gary knew that these concerns shared with him without intent to hurt him.

When I met with him in this office and sat in that chair, Jerry was in this chair and Gary was in that chair. I wrote a letter because I wasn’t sure how I would say this. I just thought the best way to do this is just write the letter and just share my observations on our church and on our staff and for our staff. I had no idea how he would respond.

I thought he might say, “You know that’s great Chuck but obviously you don’t need to be here if those are your feelings. It was two days later that Gary’s at my house sitting at our kitchen table telling me that he wants me to be the executive pastor.

After we had talked, he met with a couple of elders just one on one. Gary’s not one that sits on something very long. He will evaluate it, look

at it from every angle, but do it quickly and make a decision. So he made his decision very quickly.

I for sure wasn't saying it was time. I was just saying there's some things that just—somebody needs to lead . . . it's getting a little weird.

Again, I didn't know how he would respond—if he would be mad at me. I think it hurt him. I think some of the other individuals didn't do it with as much grace and I think that hurt him but he is such a person of protecting the unity of the church that I think he just was willing to be hurt and protect the unity of the church and to continue the momentum of something that he had created. That was his transition plan: that he delegated and delegated and delegated.

Gary realized that if he took back matters that he had delegated it would be counterproductive to the completion of the transition, so he concluded, "It's time and so let's do this thing." Two other complex staff situations related to Gary's family. Gary's wife worked on the administrative staff and Gary's son served on the ministry staff. In time, Chuck asked both of them to leave for different reasons. Their departure was handled respectfully but again, Chuck's great respect for Gary and his wife made these decisions very difficult. He also knew that Gary was not comfortable with these decisions.

Chuck believed that overall Gary had helped facilitate a very successful transition. He didn't always agree with all the decisions and was accustomed to being very hands on but he was attentive to building the credibility of the new leadership team.

One of Gary's strength's was keeping—everybody—I think Gary would try to champion keeping over reaching. I think the difference in us today is we champion reaching over keeping and Gary does not like that all the time.

He'll stop by and say, "Why aren't you guys—why aren't ya'll thinking about this?" And he does not want anybody to know that he ever asks those questions because he is masterful at just being above board and saying, "Hey, if you've got an issue you ought to go talk to these guys but

I think they're doing a great job." And he just champions the leadership and all that.

The transition unfolded over such a long time that when the actual, official transition took place, there was more of a sense of a readiness to "get on with life" than mourning the loss of Gary being consistently in the pulpit. Gary participated in all the staff meetings for the first six months following the transition in leadership. This presented complexities for the new leadership team.

It just became really clear that it was not going to work because he's such a strong personality. He'd tell about a trip he took or this or that or he had thrown his idea or his perspective on an issue and it just became really clear that—man—as much as we're really try to build momentum and help people see that Jerry is senior pastor, Gary's presence kind of keeps that from happening sometimes.

And so I remember going to Gary and saying, "I think we're going to do staff meetings differently and some staff meetings we're just going to have Southpoint staff. Some we will include your ministry organization staff and I'll let you know which ones. That was awkward but Gary totally got it.

Chuck expressed his own personal concern regarding Gary's processing of the transition. Chuck said that Gary seems to be in denial and is not dealing with the losses of the transition. "He keeps himself busy with projects but he doesn't seem to be dealing with things. He is in pain but is not dealing with it" Chuck cited an example of an interchange that took place during that week when Gary very emotionally responded to some questions about his role at Southpoint. Chuck feels that Gary is very alone and though he has many acquaintances, he has few friends that are able to really speak into his life. Chuck does not feel that he is the one who can speak to Gary and believes that there could be a high cost to being honest with Gary.

You've got Gary, his wife and his son working here and then you're going through some of those changes. It's actually quite amazing now

that I've put all that together. It's like, it's amazing. He still offices there and we're really good friends, more because of Gary than because of me. Because his character I just think all of us have a good relationship with him because of him and the choices he makes and the pain that he chooses to endure and to move on to protect the unity of our church.

Major Initiatives Launching the Successor's Senior Role

Without speaking negatively of the past, Jerry made it clear that “from day one” Southpoint was moving from a more “inward focus” to a more “outward focus.” Chuck spoke of the strengths of the church with great leaders, strong character, global impact, and a small groups focus but the weakness was local impact.

Jerry made it very clear, “We're going to—we're serious about our community and where we are . . . we are not going to be a hidden church anymore. We're going to shine the lights outward and we're going to get out in this community and get involved.”

We began to have events and life groups—mini-churches at the time—adopt a partnership in the community and do those kind of things and so that was—that was probably the biggest one.

A second major initiative was the launch of “The Forty Days of Purpose.” This was a teaching series and all-church focus based on a best-selling book and curriculum that laid out disciplines for spiritual living. The series created a lot of energy and was a sharp focus in Jerry's first weeks as senior pastor.

Jerry led that and that was the first big series that Jerry did. Gary and Jerry were planning that series originally and they were going to share it. And then Gary stepped back—and that's the beauty of it. I mean Gary is such a very godly (man). I mean to lead a church for twenty-five plus years and then to step back and to really let go is rare.

And he just said, “You know what, you're the senior pastor. You need to do that whole series. You need to do all these series from here on out but this will be a great one for the church to realize you are the senior pastor—it's not just a name thing or whatever or a title shift.”

And so that was a big one, “The Forty Days of Purpose.”

The third big initiative related to the relocation of the entire campus. The facilities were inadequate for the current needs of the church and presented obstacles to future growth. Initially the church leadership sought to acquire adjacent property, investing months in the acquisition of several business properties. Jerry led the relocation process.

Counsel to Other Churches

Chuck's counsel focused primarily on the relationship of the predecessor to the church. He cautioned that each leader is different and each church is unique so there are "fine details of that person's presence and role and involvement that you have to look at in the church and how they've functioned in the past." Chuck did not believe that one could say, "Here are the six things you do," and "There's what to do and don't do." However, he did believe there are a few guidelines that would apply to all transitions.

The first was that the predecessor should not serve in a leadership role in the church following the transition. Gary was an elder. The day that the transition took place, he was no longer an elder. Chuck emphasized that even if the predecessor had been there for fifty years, they should not serve in any governing or senior level capacity.

Second, he did not believe that they should serve as a part of the teaching team on a regular basis. He thought that they should be a guest speaker when they speak but not a part of the team that is developing the series or perceived as a regularly scheduled communicator.

Third, presence in the office needs to be determined on a case by case basis depending on how a person conducts themselves.

If Gary were to roam our halls on a daily basis and go and have conversations with people about their ministries that would be a

nightmare. He does not do that. I mean there are weeks that we don't even see him but I think he feels very comfortable now in this environment and when he is going around he sees people as a friend and is friendly to them.

If there's ever any ministry issues then his answer is, "Man, you ought to talk with Chuck about that," or, "You ought to talk to Jerry about that. Good luck with it."

I think the big ones would be: don't be in leadership; don't speak much at all; and if you cannot be in that environment without meddling and getting involved then you need to get out and get somewhere else.

Chuck referenced another church in the region in which the predecessor stayed in the church and attended staff meetings. It was awkward because the successor was introducing a dramatic shift in the entire orientation to the ministry. All of the staff were making decisions on a daily basis that they knew the predecessor was not supportive of.

It's probably better for that person not to be on the premises. I think Gary is a rare bird, that he's one of the few that it actually works to have him on the premises because he goes the extra mile not to interfere.

A final suggestion related to the financial care of the predecessor. The transition took place three-and-a-half years earlier than planned. Gary had built his financial planning around a seven-year transition. Chuck proposed to the elders to pay Gary what he would have been paid over those seven years. This provided for Gary's financial need but at the same time gave the church the liberty to move ahead with new ministry initiatives. Chuck also proposed that Southpoint support Gary and his ministry after that. This support is about one-fourth of a salary but indicates appreciation and belief in Gary as a person and representative of the church.

Max—Member of Church/Member of Strategic Planning Team

Max works as a marketing consultant for Fortune 500 companies. He and his wife have attended Southpoint for almost fifteen years. They were attracted to the church

because of the emphases that Gary advanced: grace versus legalism, community versus isolation, and teaching the Bible rather than a focus on religious traditions. They found the effective implementation of home based groups a compelling dimension of the ministry.

The Transition

Max recalled that the discussion of succession and transition began “quite a while” before there was any specific mention of Jerry. A part of this was because of Gary being in his sixties but there was no crisis like a heart attack that forced discussion as to the need for a succession plan. Prior to Jerry, Bilford was the most logical choice. Max reflected on Bilford’s departure.

How do you say this? I don’t mean anything by this. I’m not sort of reading any other meaning into it but I think in the church world nobody ever says, “I’m going somewhere else.” It’s always, “God called me to . . .” and God does that and he works great things in all. But it’s just a lot gets lumped under that expression . . .

There was a time, a few years before that (announcement of Jerry as successor) where it was announced one day that Bilford was going to plant a church in _____. Bilford was going to lead it and it was masterfully done. That was just an unbelievably well-executed church plant—transition—and in retrospect I think it was a good thing.

But I also think that there was just—Bilford is eight to ten years older than Jerry. I think at the end of the day, Bilford and Gary may have been a little too close in age and so had things gone differently I think Bilford could’ve waited another four or five years—would’ve been happy to be the senior pastor here.

He’s probably much happier doing what he’s doing now but I think what—I guess what I’m saying is—so obviously there was concern there at least on the part of the next generation coming along but the door wasn’t open yet.

And you know to Gary’s credit, he was very generous about creating that opportunity. He could have said, “Go get a job somewhere else. Instead he

said, “Take twenty percent of the people from here, [some] who are some of the heaviest givers and percentage-wise financially generous and all kinds of stuff in terms of planting this church.

The Responses to the Transition

Max felt that the responses to the announcement of Jerry as the successor and the time-frame had responses that were “universally positive.” He spoke about the high level of intentionality that Gary brought to the church regarding leadership qualifications and financial management. “He was very intentional about all these important kinds of things—this was in keeping with what we would’ve expected from Gary. And we said, ‘Okay, this is great. Of course he’s thinking about this.’” Max said that the church congregation had not thought or read much about the topic of transition. He referred to several other transition situations in the region that had not gone well. “So to see again that level of intentionality and a guy who was saying, ‘You know I may be the founding pastor here, but I want this thing to be more than my personality.’” Max shared his experience with another internationally known non-profit organization developed around a person. The founder of the organization is the same age as Gary but the founder and the organization board has not yet answered the question as to what the organization looks like after him.

The responses were very positive initially but then there was the realization that, “Guess not a lot’s going to happen for a while. What the heck are we doing? Is this ever going to happen?”

Max said that the positive responses were largely related to confidence in Gary as well as Jerry’s performance. He shared a saying that he had developed in one of the Fortune 500 companies with which he worked.

One of the things that company is really big on was this notion of you need leadership, personality and so on and the notion that in a perfect world, you're doing the job before you get the promotion and by the time it happens rather than people saying, "Oh, he's getting promoted," they're going, "Well, it's about time."

I think that was definitely the response by the time the announcement was made—well, for the most part.

Let me back up a second. Okay, it was really clear that Jerry was going to be the successor at least probably two years before Jerry was named as the successor. We had all of these sort of strangely worded things that came out in the mean time. It was well intentioned but it was all this, "We don't know anything and God may want to do and while it may be Jerry [it may not be]" And I'm thinking, "Okay there's only one person we're talking about but we're still having all these caveats in here." And I think at a certain point people kind of were feeling like, "Look you just kind of need to tell me. Do it."

So the people who weren't going to be happy with it had already figured out it was going to be Jerry and had already understood what that was going to mean in terms of generational change and style change but by and large the feeling was one of relief.

Parts of the Transition Done Well

Some individuals are a little jealous that their successor might be able to take the organization further forward. Max believed that Gary was clearly a person who wanted someone who would respect the past but move the church forward. Mutual respect was observed between Jerry and Gary.

Max also observed that Gary placed Jerry into opportunities in which he had to prove himself. "Rarely if ever did he do what in the business world we would refer to as providing air cover." He permitted Jerry to hire a worship pastor who did not succeed.

He let Jerry take on a whole bunch of thorny things and never did I see him—I don't think it was a lack of courage on Gary's part. I don't think it was anything other than saying, "it's one thing to say you are ready for it (the job); it's another thing to be six weeks into the job and find out that you are 80,000 behind budget and realize—not a whole lot of places to turn."

I think Gary maybe wisely allowed Jerry to step into some situations and say, “You’ve got to be able to handle this. And you’ve got to be able to, in a pastor role, you’ve got to be able to get there with vision and consensus and, you, know grease on your handshake and all that kind of stuff. You can’t get there by fiat. There’s no such thing as, ‘My way or the highway,’ because people vote with their feet in the church.

Max said that Jerry accomplished a couple of significant wins in his first year of leadership. One of these was the launch of the series, “The Forty Days of Purpose.” “It was just so big and so energizing . . . people said, “This is so different than what Gary would do.” Jerry was there and there was excitement. The second big win was the launch of the building program. Max shared that Jerry “agonized” over the decision as to how quickly to move into the facilities relocation. These two bold moves stand out as to important factors of consolidating Jerry’s leadership.

Challenges in the Transition

Max believes that the process at Southpoint was in many respects navigated effectively. However, there were several areas that presented challenges, particularly as the transition period stretched out over time.

The Unfulfilled Need for Closure in a Long Transition

Max spoke with admiration for Gary, particularly his character and open communication. He believed that Gary tried to be very transparent about the process, but “probably grossly underestimated the high need for clarity and closure for a large group of people.” The transition was announced but there is a seven-year period of waiting. In response to the question, “Was there any sense that Gary was lingering too long?” Max shared his perception that the transition absolutely took “at least a couple of years longer

than it needed to take.” Max said that a leader could take as long as he/she wanted, particularly if there is no viable candidate but his conclusion was that long transitions do not work.

I’ve been through this a whole bunch of times in business . . . even the little things like, “So and so’s leaving this job and transferring away with the company and this person’s taking their place. Well, I’ll stick around for a few months.” I mean, it just doesn’t work.

And it particularly doesn’t work in this kind of a thing because . . . the very things that made Jerry the right kind of person to take over, his vision, and his passion—those are the very kind of things that really make him want to lead. He didn’t want to come in and dismantle anything Gary did. He didn’t want to dramatically change the direction but he wanted to lead.

We had a long time there where I think . . . it was pretty obvious that Gary was a lame duck.

It was pretty obvious that Jerry needed to lead. It was pretty obvious that there was going to be change and I think at a certain point even the people who were opposed to the change were saying, “You know, don’t make this a slow death by a thousand cuts. If you are going to change the music—change the music but do it now because even if I don’t want it to happen, knowing that it’s going to stick around for another eighteen months and change anyway isn’t going to help me.

The way people think about church is not, “Can I get another eighteen months out of this?” But rather, “is this where I want to be for the long term?”

I think there was a tremendous amount of frustration there towards the end . . . I think there was among a lot of people . . . not a majority but among a sizeable (group) a perception—a certain point that Gary was hanging on.

I don’t think that was ever Gary’s motivation. I really don’t and I think he was moving as fast as he could.

Max spoke of his unique vantage point of being connected with Gary in terms of long-term history and yet being involved personally with Jerry in strategic and managerial discussions. He cited an example of the complexity of a long transition. Jerry

had developed a solution for maximizing the current ministry site. He had conducted research, visited other churches who had experimented with the solution, and then developed a proposal for implementation. Max suggested that Gary, Jerry and he sit down to talk about the proposal before it is put before the elders. So they met and talked through the whole proposal. Max summarized the conversation:

“I think it’s pretty cool, but Gary, at the end of the day, it’s not going to work if you don’t want to do this.” And Gary didn’t say, “Hey, I think it’s a bad idea. I don’t want to do it.” But it was really clear that he didn’t support that idea.

And so I said to Jerry. “You know what? Gary’s the senior pastor. When Gary’s ready to support it or when you’re the senior pastor, I’ll do it. Not in the mean time.”

And so there was this whole sort of thing of you know, get worked up and now this. It became this very up and down thing. That’s a lot of what was going on during that time.

The Dilemma for the Successor When a Succession Timetable Accelerates

The initial parts of the transition were, in Max’s opinion, handled very well. He does not believe that Gary waited too long to identify the need for succession. He started the process at the right time and communicated the appropriate messages, but the process was too long. He used the analogy of taking seven years to build a house that takes a year to build. He suggested that the whole process should have been no more than two or three years from start to finish. From the time when congregational members began to speculate to the actual message that Jerry would be the successor to the actual transition was almost five years. He sensed that there was a reluctance to finalize Jerry as the choice and to define what the actual process would be and a date set.

Max believed that some of this was due to Gary not having clarity as to what the next chapter in life would be for him. He stated what appeared to be Gary's thought processes.

I recognize the need when I'm sixty-three and I think it's going to take until seventy to happen. And I plan my whole life including my personal aspirations, my financial planning for retirement, et cetera, around that. But by the time I'm sixty-five I realize that not only have I found my successor but he could probably energize the organization tomorrow more than I could.

If there was another piece of advice I would give to an organization I would say, it's really, really, really, really critical that you help the senior pastor figure out what he's going to do next because he can't let go until he answers those questions.

I think going into it Gary was thinking more in terms of I'm going to sail off into the sunset . . . [but] I think there was a long time when he really wasn't clear on what he was going to do next.

That's a significant barrier.

Max said, however, that when several individuals including elders spoke to Gary about the need to accelerate the change, he was responsive.

To his credit when people confronted him about it, he said, "My gosh, you're right and if I'd ever had an inkling that anything I was doing was slowing down the church, I would've been gone yesterday."

I think it was that that caused Gary to re-evaluate the time cause when it happened it did end up happening kind of sudden.

The Generational Challenges

Max reflected on the pictures of Gary with his mutton chops from the seventies that were shown during an anniversary celebration. He said that it is almost impossible to appreciate how much of a pioneer Gary was in his day. He also said that one can see how over time what was innovation relatively quickly becomes tradition and how the

generation that ushered in that innovation can be resistant to the next innovation and sets of changes that come behind it.

In the interests of full disclosure and self-examination here, I also know there was a time when I was very much the next generation coming in. When you're the next generation coming in you're a big believer in change and I think change has got to happen.

I remember saying to Jerry one year ago, "I'm forty-eight years old" . . . I'm older than Jerry and I'm definitely pushing the upper limit of what we would call our target market. And some of the changes we're making in worship music now and so on and so forth—I remember saying to him, "One of my challenges in life is being just as passionate about the principle of change and cultural relevance when that means bringing in music that I'm not so crazy about as it did when it meant bringing in music I'm more crazy about."

Max's vocation focuses on facilitating change in organizations. He confessed that it is easy to "take apart what's there. It's a little bit harder to then build what's new. But what's really hard is to build that ongoing values driven process of continual change." He believes that transition is not just about the transition from one leader to the next, or one management style to another or from "one regime to another." Rather it is about building an organization that can grow and be sustained over time through continual change.

It's almost to where you've got to get to the point where the culture and the process almost becomes more important than who the individual is sitting in that chair and that's really, really rare in the world of churches.

He spoke of the greater ease of facilitating change with thirty year olds but of the greater challenges of envision change with the "sixty-plus" crowd and helping them understand that "it's not about you." He spoke of this transition as particularly challenging the congregation with a vision for others versus self.

The church isn't a place where you say . . . with the best intentions, "I really like going to (hear) that pastor." "That music really helps me to worship." At the end of the day that's really not what we're about.

It's about, "How do I help to create an environment that extends what God extended to me to other people. And so if it's that mindset, that's to me the key because without that it's generational war.

"It used to be about us and now it's about you and your demographics have now gotten bigger than my demographic but we're still going to argue that we give more money. And eventually the palace coup is going to happen and then the next generation is going to do it to you and then next generation is going to do it to you."

I think Gary and Jerry have been incredibly generous in this and the challenge to them that they have is trying to build that thing where every generation is now looking beyond them . . . I think it's a tremendous challenge of culture building and values communication.

Losses

Max believes that losses are an inevitable part of the process of transition. The biggest sense of loss centered around the relocation and construction of a large facility. Max felt that there was an understanding of the vision but there was deep concern that Southpoint would become just another megachurch.

There's definitely a feeling of "We're the small big church or the big church that feels like the small church." People desperately don't want to lose that.

I think that's more a matter of interpretation. Of saying, "You know my mom was growing up it was the smell . . . in the kitchen of her mother making homemade biscuits that made it feel like home."

For my kids it may be the smell in the kitchen of the muffins—my wife just bought at the grocery store. [Laughs]

But it is the same feeling and so trying to understand what that feeling is and really being reassured that we're not losing that. I think people can definitely buy into the, "We want to reach out." But they also need to know that we're not losing . . . you know you can still be a country church and put in a computerized accounting system. How do you reconcile those things?

Another dimension of loss related to where time was invested regarding those struggling with change. Max believes that Jerry appropriately focused on values communication versus focusing on what was changing and what was not. In terms of values communication, Max drew distinctions as to permission, buy-in and ownership.

Permission means you're dead. It means that you've gone through the organization. You've essentially sold your soul because you're passionate about it. For all the good reasons you sold your soul to get the permission to do this one time but if the first thing out of the chutes isn't a home run, they're going to string you up.

The next level is sort of buy-in where people say, "Look, it's your thing but we've bought into it. We give you a little more leeway cause we really understand this is important."

Ownership is when you get to the point where everybody owns that value as much as you do and so people would say, "You know what—it's a shame the first one didn't work out but we're going to keep working at this until we get it right . . ."

I think it's about driving from permission to ownership and the whole values communication that we've tried to focus on.

Max believed that the leadership group was kind to people and did not erect unnecessary obstacles in terms of change. He believes that churches in general and Southpoint in particular invest too much time trying to minimize the pain for people who have only given permission anyway.

What we really need to do is energize those people who want to have joint ownership . . . the people who think, "Just one more thing and then this is all over," its never going to end for them. And a lot of those people have already voted with their feet.

It is only going to be the people who say, "I understand why we're doing this and I understand what's next and I understand that it's never going to end because the journey's never going to end. And it's keeping that core energized.

It's not that there's anything wrong with the people who don't want to go there with you . . . I just see a lot of organizations kill themselves by trying to appease people who are never going to change.

Staff Challenges

Max believes that a key in transition is to create an organization where process and culture are more important than personality. Max was careful to clarify that he was not criticizing Gary but rather observing what he believed was a leadership style of Gary's generation in particular and the way that churches were managed at the time. Any significant church of Gary's generation was managed by what Max termed the "hub and spoke system and Gary's the hub."

You can talk about anything you want all day. You can form committees. You can have any kind of reporting structure you want but nothing actually gets executed until it gets to the hub.

What that tended to do was create an environment where loyalty was perhaps more important than competence. I see this in business all the time. This is not a character issue, just a style thing.

Jerry . . . was asked to lead certain changes on the staff well before he became the senior pastor . . . in the process Jerry ended kind of getting labeled "the business guy." (For example), he said, "Maybe we should have some quantifiable objectives." You'd a thought that we had suggested human sacrifice . . .

Accountability issues. Max spoke of the absence of accountability. It was not that individuals were not working hard. The issue more was effectiveness and measurement of those matters that could be measured. One example highlighted was the laissez-faire attitude towards tracking time off.

Of course everyone who works here is a nice person. "Why should we track vacation days?"

I know we had a little bit different philosophy but the reason I say this is the more you can create a process in a culture that supersedes one personality, the less burden that other person has to take on in terms of bringing some of that change.

Max was gracious and blunt in his assessment of Gary's capabilities. He spoke of Gary's outstanding character, relational skills, public communication capabilities, visionary mindset, but "he's a really horrible manager. He is wonderful and he can't be good at everything." Max believes that management was not a key criteria for being an effective senior pastor in his day. Again, he raised the issue of personal loyalty being more important than competence, not with any negative intentions. One individual in particular was "supremely loyal to him but ultimately became to everybody's discredit almost a joke on the staff." Jerry had to come in and take on this individual and several other individuals so his leadership get's labeled as not valuing people as much anymore. This judgment was based on the fact that three people were fired in the past year and no one had been fired in the previous ten years.

Change in leadership and management style. With Gary as the hub of the organization, everything staff and leadership-wise came through him, not because he was a control freak but because that was the model of leading that was dominant in churches during his tenure. If Gary wanted something to happen, it happened. If he didn't want it to happen, it did not happen. Max cited an example of one of his Fortune 500 clients in which the CEO would attend senior staff meetings. When he came in, no one wanted to express an opinion on an issue until the CEO would state his own perspective. Once he gave that perspective, no one was going to run counter to that. Again, Max did not believe that Gary powered up on people but rather there was a style of leading in which

there were perks in relating to Gary. Everything passed through him. Loyalty and not rocking the boat was rewarded.

Also, Gary loved the sense of “shepherding” all the staff and the congregation. When the church was small, Gary was able to shake everyone’s hand and interact with every staff member.

I’ve never had this conversation with Gary but I suspect that it was a really sad thing for him the day when he woke up and realized that the church was now too big for him to shake everyone’s hand. He always used to do that . . . he’d be at this door or this door and Gary’s the kind of guy who would say, “Even if I can’t shake everyone’s hand, because there’s multiple doors at least I always want to feel like I’m available to shake everyone’s hand . . .

Jerry is very different than that. He cares a lot about people but he readily buys into the notion of, “If I minister to such and such relationships and they minister [to others] . . . it’s a servant leadership thing. At one of my clients we call it the upside down organization.

So his world is, “Do I have people around me that I can really trust to get things done” Not just to have good intentions but to get things done.” And that’s led to a pretty dramatic change for most of the people on staff now. Their primary relationship is going to be with Chuck . . .

Jerry is choosing to be a more conceptual and visionary-focused leader as opposed to a hands-on leader . . .

I think it took a while to get people over that notion that it wasn’t about whether you’re in favor or out of favor or anything like that. It was . . . “If you want to be practical about it, you’re probably better off going to deal with Chuck about this than Jerry anyway, because Chuck is the guy who’s ultimately going to have to foot the budget anyway.”

Dealing with staff resistant to change. Max felt that the length of the transition allowed Jerry to consolidate his position as a leader. However, there were two lingering staff issues: Matt and Donna. Neither was a threat to Jerry’s ultimate leadership but they were “icons of the old culture who in my opinion were not playing well with Jerry.”

Gary's desire was that all staff including Matt and Donna work cooperatively with Jerry and celebrate his leadership. Ultimately both of these individuals had to be moved out of the organization.

Challenges in Leadership Function and Ways of Doing Business

Max again affirmed Gary's outstanding character but acknowledged that there was not the kind of accountability, guidelines, or systems of checks and balances that should have been in place. Although there was much rhetoric over being an "elder-led church," Max believed that Southpoint until recently has never been an elder-led church. His assessment was that the elders operated and wanted to continue to operate with a system in which the senior pastor tells them the problem, brings them the solution, and they say, "It looks good to us." There was tension between the management team and the elders. That tension Max summarized in a statement from one of the elders who said, "Gary's job as the senior pastor is to tell us what God's will is for the church so we can go with you." Max indicated he would not argue with the individual, he just did not agree with such unquestioned type of leading.

One of the specific examples that Max shared was the fact that Gary was senior pastor and his wife was in charge of the payroll. There were a number of family members on staff. Max felt that even if nothing improper was happening, the church was large enough that if the media had decided to write an article about it, it would have given grave appearances of at minimum a lack of discretion. Max said, this is why if a person runs for office their assets are placed into a blind trust because that individual wants to be above even the suspicion that he/she might have done something. "You don't want to be getting caught in this argument with people arguing whether you did something or not."

Max believes that there was a system in place in which if Gary had not been a person of exceptionally high character “unbelievable things could have happened to this church.”

Counsel on the Predecessor and on Process

Max reflected on the question as to whether or not a predecessor can stay involved in the church following the transition. “The emotional side of me desperately wants to believe that there’s a role for the predecessor but my mind tells me unequivocally that it’s a bad idea.” He believes that staff and congregational members need clarity, a clarity that cannot be gained if there are two leaders present. Even if there is not any conflict between the two leaders, people will speculate as to how each of them may differ on particular issues and wonder if there are competing visions and agendas. He believes that the best transition is one that is clear, agreed upon, a general transition of power, and not a hostile takeover. When the predecessor is available to the successor on a private, consulting basis, Max considered it a great thing but he also strongly felt that the predecessor needs to be out of the picture publicly.

Max did believe that the failure to define roles and the change in roles over time resulted in significant ambiguity. The beginning was great and then the transition ended with two or three years in which things were lagging in the overall ministry.

I think one of the reasons, frankly, why Jerry chose to go into a building program as soon as he did—I can’t even tell you how many times we had this conversation before—during the transition but before it was complete. Jerry would say something like, “I want to be able to lead and lead in a bold and visionary way.” He was very frustrated during that time. And he would say things like, “I hope I don’t get to the point where I forget what it’s like to actually pull the trigger—you know, lose my nerve or whatever that is.”

I think it was that lagging time period in the middle that drove the ambiguity. I would imagine part of it was that out of deference for one

another and respect for one another that they danced. To act decisively on both of their parts actually had some downsides . . .

There's always a temptation to say, "How can we structure and process such that there's not ambiguity," and yet I think you need a balance. I think we needed in our case—we did not have enough clarity. We had too much ambiguity and we did not have enough process.

What saved us is we had two guys with high character who really got along who were able to negotiate all these things.

I would've liked to have seen an environment where there was a little more balance between those two but even in the case where you had perfect clarity and perfect process, it's not going to work if you don't have character and negotiation and all those things going on the other side.

Mark—Long Time Elder Board Member

Mark is the longest serving elder at Southpoint, having served since 1982, the formation year of the church. He served at Gary's previous church, a tenure that ended with a great deal of controversy, a church split, and Gary's departure to start Southpoint. Mark is a peer of Gary's—long time family friends and just two years apart in age. He spoke with open admiration regarding Gary's gifts as a pastor, teacher, writer and leader.

The Transition

Mark reported that several years before Gary proposed the need to establish a specific transition plan, the elders raised the concerns about the complete absence of any type of succession planning. Their concern was along the more pragmatic line of concerns as to what might happen to the church if the church lost their "very high profile pastor" to a catastrophic event.

No one is irreplaceable but some folks tend to be more irreplaceable than others and he [Gary] seemed to be in the category. . . so what we did to sort of I guess make us feel a little better, we bought some key man insurance, a couple million dollar policy. That's when we discussed and

became concerned about what happens, who is the next pastor going to be and is it going to happen voluntarily, and what if Gary gets hit by a Mack truck tomorrow, what do we do?

Several years after this conversation, Gary opened the discussion with the elder board and recommended that a seven-year succession plan be established. Mark said that the elders did not pressure Gary to establish a plan. He believed that Gary realized that his age (68 years old at the time) was causing questions and concerns within the congregation. Gary visited each of the elders individually and asked which of the individuals currently on staff was the best person to replace him as senior pastor. Without the elders collectively having knowledge of these conversations and without any discussion among them, each elder said Jerry. As a board then they affirmed Jerry as the successor candidate and also endorsed the seven-year period.

The successor qualifications were not specifically identified in advance. A formal position description or successor profile was not developed. The culture and values of the organization which had largely been shaped by Gary formed the context for the elder opinions. It was assumed that Gary would identify the successor. Public communication gifts and an orientation to teaching the Bible was every important. Belief in the culture and values of Southpoint was a crucial factor including the commitments to outreach, teaching, and relational ministry in the context of home groups.

The fact that Jerry had been at the church long enough to be indoctrinated in what we would call the Southpoint philosophy of ministry which values both the word of God and being clear and strict with that but also with Southpoint and the thing that Jeff has brought to the church that he has really worked hard at is the area of outreach and evangelism which was always a value.

Jerry had been teaching and it was obvious that he was a very gifted preacher, very gifted as a communicator and then the fact that he had

worked on some key things for the church [showed] his intelligence, his ability and his education.

Once Jerry was identified as the successor, Gary more closely mentored him, preparing Jerry for the senior pastoral role.

Things Done Well in the Transition

Mark mentioned two specific items that assisted the success of the transition: The first was Gary's strong commitment to the success of the transition. A part of this commitment was the intention to withdraw from the leadership and operations of the church.

I will say this for Gary. Gary really was the key person in the whole thing. He made it work because to his credit one of the things he said which really impressed me was when he handed the baton over to Jerry, he said if anyone, elders, members of the church, have any concerns about anything Jerry does, I will not talk with you about it. Do not come to me. Do not discuss any of your concerns with me at all because I will not discuss it with you, whatever it is, and he has been true to that. That was a big help to Jerry.

I'm sure there were some things that happened that he (Gary) didn't like. That is just human nature but he made it work because he really engineered it all and he made sure it worked and he wanted to have a real success story . . . but he made it work.

Mark shared that Gary became as invisible as he could, resigning from the elder board when the transition took place. When he attends church he sits in the very back section of the Friday night service. His tradition had been to sit in the front row every week. Gary is in a small group and teaches a Tuesday night Bible study. He preaches when invited by Jerry. His office is located on the opposite side of the building from the rest of the staff. Mark felt that Gary had been very effective in the transition.

The second matter that helped the succession succeed was the rotation of the elder board. Gary recommended that there be a rotation of the elders at the same time that there was a transition. We all agreed to it as elders that when Jerry came in he needed his own team of elders and all of us would agree to stay as long as Gene stayed, until age seventy-five.

We would all get off of the Elder Board then and let Jerry bring in his own people. Now Jerry became aware that that was not a good plan because that would not come across well because they would say a lot of the people have been around here for a long time.

You've gotten rid of (elder), you've gotten rid of this guy or that guy, and now all of the elders have left. What is going on here? Because Dave left, Harry left, Mark left, Evan left, all of these guys have left—there must be something bad going on here and while there were people close to (elder) and these other folks that got disgruntled then the concern was there would be a lot more people who would get disgruntled if we left the board all at the same time.

That idea changed and we all have stayed until what we had established ourselves several years ago as a mandatory retirement age of seventy-five, and I think that is serving us pretty well. In fact, I will take the blame or the credit—I am the one who instituted that and now I am approaching, I am seventy-one.

There are two more – Harry is leaving this year, next year Russ will leave. There is almost one a year so it is an orderly transition rather than having all the people who had experience as elders leave and then a whole bunch of new guys.

Jerry has brought in some new people as elders that weren't on the Elder Board before and that has gone well and he has taken some advice from some of us. He has asked who should we put on and he has had some favorites obviously, people he is close to that some of us really haven't been close to, but he has some people on there that we recommended that would help him.

Challenges in the Transition

The Length of the Transition

Mark acknowledged that from the beginning the elders thought that the seven-year period seemed “rather lengthy and it turned out that it was.”

What happened is some younger members of the church more about Jerry’s age and people who were actually close to Jerry individually called me up and said, could I meet with you. I said sure and the topic was, if we don’t do something we could end this after three or three-and-a-half years, about half the time we had set aside, which at that time Jerry was preaching fifty percent of the time, and said Jerry is really ready.

They said I don’t think we can hold him for another three-and-a-half years. He is ready and if somebody else offers him a senior pastor somewhere we might lose him and we really think the time is right, and so there were three individuals who met with me individually and said we think you are the best person on the elder board to do something about this.

So, the monkey was sort of on my back and so that is when I met with Gary and told him of their concerns. He agreed, very graciously, that Jerry is ready and he is preaching half of the time and he agreed that now is the time to set up the actual transition so he asked me to chair that which meant I met with him individually and then I met with Jerry individually over a fairly long period of time.

Negotiation for Settlement for an Early Transition

Mark was the elder assigned to work through contractual issues with Gary. These issues included whether or not he would be fully compensated for his last three-and-a-half years and how the transition would take place. Although Gary was appropriate in his negotiations, Mark felt significant duress as the one negotiating between Gary and the board.

The difficult part for me because of my close relationship with Gary is negotiating with Gary and the elder board and saying “We can’t quite do this.” And he was making some requests or almost demands. Actually I

got sick during the period of time. I developed high blood pressure and finally at the end of that said I have to back away from this. It was getting to me pressure-wise, trying to meet his request and demands and the elder board saying we can't do that. That is too much.

Staff Issues

Mark raised the issue of ambiguity for staff in general and then identified one particular staff person, Matt, as a significant source of conflict during the transition. Mark returned to conversing about this individual several times in the course of the interview. The issue of ambiguity set in over time. Once the congregation and staff was aware that Jerry should be the successor, Mark observed a shifting of allegiances and yet confusion. "Do I follow Gary or do I look for Jerry and see what direction he is going?" This was another reason that in Mark's opinion the acceleration of the transition made sense. The elders thought that the first three and a half years went well but already the transition was feeling quite long. They did not believe that an extended transition would remain positive.

He reported that the staff agreed that Jerry was the correct choice for successor, this opinion even being shared by those who might be considered contenders for the position. There were several long-tenured staff members who refused to accept a subordinate position to Jerry. Matt was one of these. Mark described his relationship to Matt as close. Mark encouraged Matt to remain in a staff role at Southpoint but Matt decided to leave.

I think it was a mistake on his part. I would have loved for him to stay and I told him he was the best person to continue . . . and it would be a great help to Jerry and Jerry asked him to stay, but in his mind, he had been number two to Gary.

He was Gary's administrative assistant, but there is no way he would have been the best person to be the senior pastor. He was a good number two, good business-minded guy, was good at that role, but he was not senior pastor material . . .

I did everything I could to persuade Matt and I was as close to Matt as anybody. I couldn't persuade him to stay. Jerry visited him and asked him to stay.

I think it was just ego. He just couldn't stand working for someone else and taking orders from him and that is how he viewed it.

Mark acknowledged that Matt had performance and accountability issues prior to the transition ever becoming an issue. Mark's evaluation was that neither Gary nor Jerry are effective administrators although currently Chuck covers for Jerry in this area. Gary is a "super pastor" and a mentor.

His real weakness is administration and Matt was his assistant. Matt got away with murder because Gary just wasn't paying attention to what was going on. For example, and again, Matt was and continues to be a very close friend, but I would call up here and ask for Matt. "Well, he is not in." "Well, when do you think?" "I don't know." "Do you know where he is?" "No, I don't know." "Do you have a number where I can reach him?" "No."

I confronted Matt. I said, "Matt, you need to let somebody at the church office know where you are at all times." He said, "I don't want to do that." I said, "You have a cell phone. You ought to give that number." He said, "I don't give my cell phone number to anybody." That brings up a lot of suspicion of where you are and what you are doing. I said, "For your own security somebody needs to know where you are." But he fought that.

I talked with Gary about it. Gary never really did anything about it.

Mark said that this was remarkable because Gary by nature is a very confrontational person. Mark had learned that anytime he brought up an issue, Gary would seek to "solve it within the next twenty four hours."

When it became apparent that Matt could not remain at the church, Gary negotiated a very generous settlement for his long-time assistant. Matt was sent to serve

as a staff member at a young church in another part of the country but he received his full salary for three years after leaving Southpoint. He salary was “very substantial . . . it was financially costly to make that transition the way we made it.” He’d been on our staff for thirty years.

Mark reported that there was a domino effect when Matt left.

I had one guy who came to my house and he visited with me for two hours and said, I don’t know if you know what is going on. He was in charge of communications here. And he said, I’m the first to see what is going on. You need to know Jerry is going to do away with all of the small group ministry, he is very much against that, he is going to do this, he is going to do that.

I took note of all of that and I said I appreciate you telling me that so I sat down with Jerry and said, this is what is being said and he said, that’s ridiculous. I am not about to do that. And so that guy moved on too. I think there were really other issues other than that. He obviously made up that story and there were a couple of other fairly senior people that just . . . Jerry was very young. Jerry was under 40 and so that was difficult for a lot of people on the staff but I think the people that stayed . . . all agreed that Jerry was the best guy.

Leadership Style Differences

Mark related a portion of the experience that he shared with Gary at the previous church. Gary shared the senior leader position with another pastor. This previous church merged with another church, resulting in almost forty individuals on the senior level board and two camps: the younger and the older camps. During Gary’s sabbatical from the church, the other young leader led essentially a coup that on Gary’s return led to “a very ugly, nasty split.” Southpoint was formed out of this split but Gary started and led the church with a “less democratic view of church administration.”

A much more of a controlled kind of thing and that prevailed throughout his administration of this church that he very much was in control,

although he was very sensitive and would listen to us as elders and he made changes as a result of our input.

It wasn't that he was a real mad dictator type of administrator but he was not as open and he was more attentive and alert to what was going on in the lives of people. Even after that we had a pastor here who wound up with a moral failure with the gal who led our worship and he was married and she was married and that resulted in our asking Fred Jones to lead the church and that resulted in a lot of people who couldn't understand it, they were very upset over that. So we had some very tough issues through that time . . .

Actually when Jerry came in as the Senior Pastor, he went back to a more democratic kind of administration that Gary had had because he recognized that having served on the elder board too and working closely with Gary over that three-and-a-half years so he established what I would call a more open and free kind of administration from the board of elders.

Now I would also say and this is something I really need to say to Jerry, my perspective of that is more appearance than it is reality, that our church even though we say we are elder ruled and we are, my perception is we are very staff led.

Because I know I hear a lot of recommendations made by the elders that don't ever get the light of day whereas with Gary, even though he was operating, he would listen and he would make changes because he appreciated people pointing things out to him. In fact, you would even find things that I said to him in some of his books that he has written.

Congregational Concerns

Early in Jerry's tenure, he approached Mark with concerns about the loss of mature, older members of the congregation. Some of the concern was observational as to the response of the older members to changes in worship format. Another part of the concern was from conversations with another church in the region that lost many older members. The loss wasn't felt so much financially as in having more experienced leaders to mentor younger, less experienced leaders. Jerry spoke with Mark about this concern

and his own commitment to do what was necessary to maintain the older congregational members.

Now, we haven't done a good job at it in my opinion. Jerry may differ from that in his view of that, but we have lost a lot of those members and every time I have made a suggestion on what we can do we haven't done it.

And our worship style has changed and it is freer, it is somewhat louder, those things that appeal to people primarily I say between thirty to fifty, thirty to forty-five and we have had great growth. The church is growing well and when we make this move to the new location and change our name, I don't think we have any comprehension of how much we will grow. In fact, I don't think we will have enough for . . . a church facility there to accommodate the growth, I really don't and I think it is going to tax us and I have said all along the really big issue for us is leadership. I think we are going to have a hard time having the leadership that is necessary for the size congregation we are going to have when we move.

Counsel to Other Churches

Mark's primary counsel to other churches was to work with the predecessor in terms of defining the next chapter in life. Mark said that he spent time providing counsel for Gary to dream big dreams, dreams that matched the energy and vision he still had for ministry.

CHAPTER 7

DATA ANALYSIS AND FINDINGS

Approach to Data Analysis and Findings

This study seeks to increase understanding as to the process of leadership succession in megachurches. The design of this study was not to construct a single account of leadership and organizational change, nor to derive a causally linear model of the succession process. This qualitative case study did not seek to be statistically representative of the population from which it was taken and there was not the intent to generalize findings to the entire population being studied—in this case all megachurches. The small non-random sample of churches participating in this study makes statistical generalization inappropriate to this study. Interpretive qualitative research such as this study on the transition process of megachurch senior pastors, rejects the premise that individuals or cases represent the entire population. A case study is not a sample of one drawn from a defined population; a multiple case approach is not comprised of a sample of three drawn from a defined population. Therefore, one cannot make statistical generalizations to any population of megachurches experiencing succession on the basis of this study. However, the sampling decisions were purposive (rather than statistically random) to allow the researcher to describe the succession processes of megachurches. Insights were gained on succession processes. Description of these processes is significant and contributes to learning about leadership transition.

This chapter on data analysis was linked to the overall purpose of the study. The desired outcome was rich description of the three megachurch processes and a comparative examination of the similarities and differences of the process. There are

similar ideas, themes, patterns and perceptions. The data tell a story, actually multiple stories that cannot be woven neatly into one account. Kvale (1996) writes, “How do I go about finding the meaning of the many interesting and complex stories my interviewees told me?” (p. 179) and continues, “How can the interviews assist me in extending my knowledge of the phenomena I am investigating?” (p. 182). Kvale offers some help in describing the nature of data analysis conducted in this study:

Five main approaches to interview analysis will be outlined: categorization of meaning, condensation of meaning, structuring of meaning through narratives, interpretation of meaning and ad hoc methods for generating meaning The central task of interview analysis rests, however, with the researcher with the thematic questions he or she has asked from the start of the investigation and followed up through designing, interviewing and transcribing (p. 187).

General Overview

Insights Gained

The insights offered below suggest what churches might expect in the transition of a senior pastor. The thick description provided through the interviews regarding the experiences of those living through a transition does provide illustration to the work of others who have written on succession, leadership and group processes.

Transitions as Extraordinarily Complex, Multi-layered Change Processes. Succession is a process, not an event. Each of the cases rehearsed a multi-year process, the shortest of which was four years, the longest of which was almost six years. The process described was messy, unpredictable, accelerated and conflictual in ways that predecessors, successors, leadership boards and congregations did not anticipate. Organizational change in general is a “complex, dynamic process, rather than a smooth, step-wise

transition from one state to another” (Blewett unpublished dissertation, 2000). A number of studies attempt to establish a model or predictable set of stages that follow one another sequentially in a neat linear process. For example, Gersick, Lansberg, Desjardins and Dunn (1999) proposed a seven stage model including preparation, trigger, disengagement, dream exploration, choice, commitment and implementation. The cases did indicate definitive decisions being made—the decision, for example, that a successor be sought—but the stories told seemed to indicate a gradually morphing process that unfolded over time with many players, events and actions. Pettigrew’s (1985) description of organizational process as a sequence of individual and collective events, actions and activities unfolding over time is helpful. He qualifies that description by stating that “social reality is not a steady state. It is a dynamic process.” There is the search for patterns, for insights, in order to draw conclusions and derive insights.

Each of the cases highlighted the complex human dynamics that unfold in a transition and how changes are more multi-layered and complex than the simple change of a leader. Time tables are set, anticipated sequences laid out, but then in each case there had to be flexibility and responsiveness to the way that organizational life was unfolding. Patrick Dawson’s insight on processual research is useful to repeat:

[There is the] importance of context in examining unfolding processes of change, yet, unlike contingency models, are not drawn towards unidirectional episodic theories of change . . . concepts and ideas are formulated both from the literature and generated from data-driven induction. There is not an attempt to build grand theory nor is there a removal of preconceptualisation as suggested by some elements of grounded theory. . . . As ‘real-world’ examples of company experience, processual case studies are able to tell their own story of the way change unfolds in practice (p. 389).

Transitions are not unidirectional. There is an ebb and flow. In Community Church, for example, the initial parts of the transition went well—great responses of the congregation toward the successor and synergy between the predecessor and successor, but then personal dynamics between the predecessor and successor came to play followed by several organizational decisions that put the organization into what one leader described as the “perfect storm.” That same metaphor was used by the elder chairman at Covenant Church to describe what unfolded in the first eighteen months of the successor, this unfolding after what had been termed a “model” transition.

Four Groups to be Considered in Transition

Much of the leadership literature focuses on the predecessor and successor. Each of the three churches spoke of four significant groups to be considered in the transition: the leader, the staff, the leadership board and the congregation. Each of the four churches invested significantly in the transition of the leader and the leadership board but did not invest significantly enough in the transition of the staff and the congregation. Community Church’s transition of the senior leadership team out of daily operations before there was a capable new team was the near undoing of the successor. Only recognition by the leadership board and the successor of the crucial nature of rebuilding this team led to a reversal of deep instability at staff level and uncertainty in the congregation.

Transitions as Deeply Personal Journeys for Many Involved

Transitions are often written of in pragmatic, objective terms but each of the interviews uncovered depth of emotion and expression in describing one’s personal experience or the experiences of those involved in the transition. The word “journey” is used with deliberation to describe, for example, the predecessor’s recognition of the

coming closure of his/her tenure as leader of an organization that he had led for many years. The transition was not an event in time. It was something that evolved slowly and is still unfolding as the leaders, leadership boards, staff and congregations adapt to life that is very different than it was five years ago.

Reagan, predecessor at Community Church, spoke of the profound delayed loss that he so poignantly captured in his expression, “the dismissal—I was a ghost.” He recognized at that moment that the organization had moved on and he was no longer a player. Several leaders at Southpoint spoke of the angst that they experienced as the organizational dynamics grew more complex the longer the transition continued and they realized that they needed to tell Gary, the founding pastor of the church, that it was time for him to step down.

The successors and other participants spoke of the complex relational mazes to be navigated during the transition--the profound sensitivities of respecting and honoring people and yet moving the organization forward. They reported the mix of emotions and perceptions in the congregation—those with deep loyalties toward the predecessor and those ready to move on to a new future. Transitions of the senior pastor in megachurches differ from businesses or other organizations because of the congregational constituency.

The remarks that Nate, Covenant Church’s elder board chairman, shared offer insight:

In a business if you’re still delivering the same product, if you’re stamping widgets, and if client A still gets their widgets by nine a.m. Thursday morning, it’s oblique to them who is sitting in the CEO chair.

Our constituents—it’s a much more esoteric discipline, as you well know, in the pastorate.

People evaluate everything. From whether you wear a tie or not, to whether your slacks are pressed, to whether your shoes are polished, to

whether or not you have a goatee or a mustache and facial hair, literally, to why did you sing this type of hymn?

Did you add a drum? Why an electric guitar? Why not a folk guitar? You know the sermon was twenty-eight minutes instead of thirty-two. The scripture references were—you know, you name it

And there's a sense that you have 18,000 critics even though you're delivering the doctrinal fidelity of the gospel on a weekly basis and that makes this much different than business.

There is the weekly contact of the congregation with the senior pastor as the primary communicator that provides one of the unique dynamics. This leader is seen as the primary vision-caster. A change in leader represents a change not only in the delivery of a “product” (a message) but also in the leader and shaper of vision. It was clear in the interviews that people in congregations, in leadership and on staff teams respond in a deeply personal way—from a profound sense of loss to joy, from deep confidence to grave misgivings.

Conflict and Challenges as Inevitable

Given the intensely personal response to the change of senior pastor, it is no surprise that transitions are times of conflict and challenge. The three churches represented in this study are widely recognized as strong ministries with good organizational processes. They are known as places with exceptional leadership and planning. The predecessors were described as humble and purposeful in seeking to lead organizations that outlived their tenure and that were not built on personality. Yet, each of the churches described deep points of conflict leading in some situations to open critique of leadership and departure of long-time members.

Many of the interviewees reflected that certain things could have been done differently but that even more extensive planning would not remove the very real possibility of conflict and challenges. A number of contributors were identified through the interviews. One is the simple fact that leaders are different. No two leaders are alike in terms of management style, vision formation, communication, decision making, priority selection and relational commitments. The leaders can share the same values for the ministry (to use Community Church's language—the same DNA) and yet those values can be emphasized to different levels and expressed creatively. Each of the churches was very permission-giving for the new leader to express his leadership in his unique way, so it is understandable that conflicts emerged and challenges encountered. Change of any kind is particularly highlighted during the transition of the senior pastor. Several of the interviews referred to the heightened sensitivity to and interpretation of changes: Were these indicators as to decreased sensitivity to a particular segment's needs or preferences? Were the changes indicative of a shift of power or influence or priority or theological correctness?

The natural ambiguity of the transition of leadership. Each of the churches confessed that greater definition of roles and decision making could have eliminated some of the conflicts and challenges that unfolded. At the same time each recognized that transitions are extraordinarily complex as there is the hand-off, over time, of various responsibilities. Although each of the churches identified a specific time when the “baton pass” took place, the interval leading up to that time was confusing for all involved. At some undefined point, the successor was perceived as the person to go to and yet there is the absence of clarity for subordinates as to who to go to for collaboration or decision.

James, successor at Community Church, described the tension for him in board meetings when there was greater confidence in Reagan as the long-term leader and yet he (James) was the one responsible for an idea and the implementation of the idea. Reagan, so accustomed to leading and being the idea person, would overshadow James by his involvement in board meetings.

Ambiguity in the change of roles was one clear finding in the three cases. Leadership boards and staffs had become accustomed to particular ways that decisions got made and the way life unfolded. The successor in each case, even though within the organization for several years minimum, had different ways of making decisions and leading. It appears that these different ways were assumed to be understood but not articulated. Conflict was one of the means of highlighting the differences and working towards understanding.

Change fatigue. In each of the organizations the change of the leader was just one of a number of changes that the church experienced. It appears that churches can expect that the change of the senior leader will also represent changes in other areas. Each of the churches considered undertook ambitious construction projects. Each experienced the change of either other senior leaders or senior leadership structure or both. Each resulted in cultural changes, for example, in Covenant Church, the movement towards greater informality on the platform and the greater use of humor in communication. These last two items do not seem significant but given forty years of history, the preferences of different segments of the congregation, and the perception of individual congregational members of the successor (for some the predecessor was a peer, now the successor is someone young enough to be their son or grandson), it is understandable to have a period

of adjustment. In each of the churches there was a notable transition of various staff members and staff structures.

No one change was the issue, but in each case, the convergence of multiple changes appeared to result in decreased capacity for digesting the next change. Leadership seemed to have greater capacity for absorbing changes than the congregation, a part of this related to the amount of communication as well as time invested by the various groups in processing the changes. It is similar to the case of car sickness—the driver, who anticipates the movement of the car is not the one who gets ill, it is the one in the backseat who is at the mercy of the one at the wheel. Change upon change results in fatigue. The pace of change, the complexity of change, the numbers of changes are among the factors that contribute to conflict. In several of the interviews, the concerns were not even that the proposed changes were bad ideas, it was just that it was “one more thing” to which to adjust.

The sense of a leadership vacuum and leadership credibility. Many of the interviews referred to the sense of comfort that long-term members had just in knowing that the predecessor and his team were still in place (prior to the final transition). These long-tenured leaders had proven themselves in a variety of circumstances. They had led the organization through its time of greatest growth. Although there was organizational knowledge of the successor, that knowledge did not include the observation of the successor in the leadership role in a diversity of circumstances. The sense of a leadership vacuum was clear in each of the churches—not that there was no leader—but rather among at least a portion of the staff, congregation and board, there was a loss of the level of confidence that the predecessor enjoyed. Covenant Church appeared to be the most

intentional of the three churches in building confidence in the successor but yet it still experienced a time of deep organizational angst.

Insider/Outsider Dimensions and the Idea of Socialization Need Examination

The insider/outsider dichotomy has been one of the most researched dimensions of succession literature. There appear to be degrees of “insiderness” and “outsiderness” (Grusky, 1964). The distinction traditionally refers to whether or not the successor is promoted from within the organization. All three churches indicated their strong preference for a successor within the organization. Community Church was the only one of the three that conducted an external search after two failed attempts at hiring an insider. The preferences related to ideas expressed in socialization theory. Schein (1968) suggests that socialization is the process by which individuals acquire organizationally specific values, ways of thinking and doing, forms of behavior, skills and organizational perspectives. Significant conflicts emerge simply because newcomers do not understand or even perceive unique dynamics.

Fondas and Wiersema define socialization as “the process by which an individual acquires the skills, knowledge, values, perspectives and expected behaviors needed to occupy an organizational position” (p. 566). However, in this case study, although it was clear in each of the churches that the successor was essentially an insider when becoming the successor, each one was almost a stranger in an experiential sense to the new role. Gage, the predecessor, and Don, the successor, from Covenant Church both spoke strongly to how shocking certain aspects of the senior pastoral position were, this despite seventeen years in the church as the lead associate pastor with almost daily exposure to the predecessor and his role. The intense pressure, the ultimate sense of responsibility,

and the intensity and personal nature of critique were three of the surprises that Don experienced.

Beyond that, the claims of socialization theory do make sense—that conflicts emerge because newcomers do not understand or even perceive unique organizational dynamics and ways of doing things—and yet the three cases demonstrate that although a congregation may know an individual as an associate pastor, it does not really know him/her as the senior leader. The congregation and the successor do enjoy the benefits of familiarity and a common knowledge of culture and yet neither the congregation nor the successor know how each will respond to the change in role and the subsequent changes that accompany the role change.

It is one thing to trust an individual as an associate pastor and another thing to trust him/her as the senior pastor. Trust in the individual does seem to have some role relationship. Trust was one of the issues raised by a number of those interviewed. Clearly in these three cases, though there was overwhelming confidence in each of the three successors as communicators and as individuals, there was a trust-building process that each of them was experiencing that will go well on into the future.

Succinctly stated, socialization—insiderness is not a guarantee of a seamless transition—knowledge of an individual and long-term service within the organization does not give complete knowledge as to how an organization will respond to the removal of a leader and the elevation of another leader. The new leader may very well lead in a different way as a senior leader than when he/she was a second in command. One of the believed benefits of outsiders is the creation of new ways of thinking and doing that help organizations adapt to new environments. However, as Collins and Porras (1997) point

out, and as these three case studies demonstrate, organizations should not assume that hiring an insider is equivalent to non-change.

Each of the successors brought significant change to the respective churches particularly in terms of staff and organizational structure. Each of the churches appeared to be in need of a major transformation of how leadership worked itself out in the various levels of the church. The historic ways of managing had been outstripped by the growth of the churches. The changes behind the scenes were significant although not fully appreciated by the congregations.

New congregationally-wide initiatives were launched and although none of these were spoken of as revolutionary, the shifts over time will be significant. To cite two examples, Don, successor at Covenant Church, launched an initiative to become more community focused with an increasing number of activities occurring off-campus. This is a significant change, given the investment of tens of millions of dollars into the facility and the general mindset that people come to the campus for the delivery of various ministry services and opportunities. Jerry, successor at Southpoint, is refocusing the ministry from internal to external, from those already a part of the church to those not a part of any church community. The church's entire history has rested on "fellowship" groups. This represents a significant shift. It is possible that their insider status makes these changes appear less revolutionary than they may eventually be than if he/she were an outsider announcing these changes.

Each of the churches appeared to benefit from the continuity of leadership and preservation of the organizational ideology. Preservation of an organization's core ideology appears to be a stabilizing factor during times of transition. Although significant

changes were introduced, the successors in the three cases clearly were considered to be holders of the core ideology. Succession literature suggests that a successor versed in an organization's values, relationships and culture appears to be more able to preserve the core of an organization, thus creating a better opportunity for an effective transition. Although two of the churches experienced some months of conflict and successor criticism, the churches have settled out and experienced growth and enthusiasm regarding the future. Collins and Porras (1994) argue that continuity of quality leadership matters. They concluded that "it is extraordinarily difficult to become and remain a highly visionary company by hiring top management from outside the organization" (p. 183). Zhang and Rajagoplalan (2004) found a positive relationship between organizational performance and relay succession. These case studies are not posited to "prove" that this is the case but do provide some tangible description of relay succession.

Transition as Leadership, Leadership As Transition

Succession is leadership. Leadership is succession. The succession process is a way of looking at leadership. These case studies did not focus on any one model or theory of leadership. It would be presumptuous, based on the brief encounters with successors and predecessors, to make the judgment as to whether or not a leader was more charismatic or transformational, or whether situational theories of leadership offer more insight than trait-based theories. This does not imply that some insights cannot be gained regarding the nature and practice of leaders. The interviews revealed some rich pictures as to what leaders do. Succession processes distill many of the skills that leaders must employ and the actions they must take. The natural variation and complexity of organizational life are intensified during a transition:

the leader's effectiveness or lack thereof will be more visible during such a period. In short, there is a great deal to be gained from focusing on leadership studies during periods of change thereby encompassing organizational, situational, and leadership variables simultaneously (Gordon, 1984, pp. 188-189).

For example, transition is a change-management process. Anticipation of potential trouble points, responsiveness to a changing environment and constituency, conflict mediation skills, vision casting, empathy with those experiencing the losses inflicted by change and the credibility gaining process are all expressions of leadership instincts and skills. The failure to recognize threats, such as in the case of James at Community Church, can be a costly error in leadership judgment. James did not initially recognize the organizational damage that the disgruntled former staff director was doing nor did he recognize the instability settling into the staff by his failure to deal more decisively with this individual.

Entire studies could be designed on leadership communication and leadership in the midst of conflict. Covenant Church, in particular, appeared effective in anticipating various issues that would arise in the transition process. The utilization of an extended metaphor, the passing of the baton, was an effective way of communicating a complex process to all the shareholders in the transition (same lane, same direction, same goal, designated zone for passing the baton, both runners at full speed, the one receiving starts running before the baton passer arrives, clean release and cheering each other on). Bob, executive team member of Community Church, spoke of the much more intentional involvement when instability set in to the congregation. There was a much higher level of communication and more specific communication. Communication messages were

crafted to address specific concerns. Common language was developed to allow continuity of communication during the “perfect storm.”

The case studies provided an opportunity to interact with Collins’ Level 5 Leadership Theory (2001). “Level 5” refers to the “highest level of executive capabilities that we identified during our research” (p. 28). Level 5 leadership “builds enduring greatness through a paradoxical combination of personal humility plus professional will” (p. 28). The stories and comments told about Gage, in particular, spoke of Collins’ concept of a Level 5 leader: “Ambition first and foremost for the company and concern for its success rather than for one’s own riches and personal renown” (p. 26) and deep resolve. His behaviors in deferring to his successor in board and staff settings and suggesting that he make decisions because they would have greater impact in his (the successor’s) life. All the interviewees at Covenant Church spoke of admiration of both the predecessor and the successor (and in their cases, of each other) particularly using words like humility, respect for one another and integrity.

The Similarities and Differences in the Three Cases

There were remarkable similarities in the cases although the churches were geographically, demographically and denominationally diverse. Although the actual experiences differed, there were many similar themes: the ambiguity of leadership transition, instability in the congregation, trust-gaining period for the successor, change fatigue, the need for transitioning of the elder board, staff and congregation at the same time as the transition of the senior pastor and loyalties to the predecessor.

There were several notable differences. One of these was that Southpoint Church appears to have experienced less dramatic time of conflict in the first year to eighteen

months following the transition. Explanations could include that Southpoint was a much smaller organizational system; the predecessor was older than the predecessors at the other two churches and thus expected to retire soon; and some of the major staff issues had been resolved by the board prior to the transition.

Each of the predecessors had a different experience regarding the level of loss. Reagan, the youngest of the three, experienced the most powerful sense of loss. He was the one who had been out of the position longest and spoke of the delayed sense of loss. The other two predecessors were only about one year out of their transition. Several interviewees at Southpoint Church noted their concern as to how Gary, the predecessor, was actually processing the change in role and had noted some behaviors recently that would suggest that the sense of loss was beginning to settle in. Gage, predecessor at Covenant Church, had the most recent succession and seemed to have experienced the least amount of loss. One difference should be noted: his actual transition time period actually correlated most closely with the planned time period. He transitioned six months earlier than planned. In the case of Reagan and Gary, the transition occurred several years before each of them had anticipated.

The Stakeholders in Transition

The Predecessor

Each of the cases raised explicitly the four groups impacted by the transition of the senior pastor: the leaders, the board, the congregation, and the staff.

The interviews brought into clear focus several key issues for the predecessor. Succession does not tend to be one of the issues that churches and leaders address. A

number of the interviewees spoke to the importance of both the predecessor and the board initiating conversations regarding this inevitable event. Bob of Community Church offered a series of questions related to these conversations including: What is the level of trust between the predecessor and the board? How is the board going to come alongside the predecessor to help him/her develop a plan for the next chapter of life? Several interviewees spoke to the need to develop a vision that was much larger than simply the transition of a leader. Several of those interviewed at Southpoint Church felt that the ministry “stalled out” for a period of time because the vision was simply the transition of their long-term senior pastor. A number of the interviews indicated the need for a vision to be developed more holistically for the church of which the senior pastor’s transition was a part. This is a subtle but important distinction.

The Importance of the Predecessor’s Vision of Self and the Church

The predecessor’s perspective of self and vision for the organization also were raised as dominant concerns that contribute to the success or failure of the succession. Bob, an executive team member at Community Church, spoke of their vision for the “one-hundred-year church.” They didn’t want to be a part of a church that lasted thirty years and had no future. Several interviewees at Southpoint Church and Covenant Church spoke of the predecessor’s desire to have a church that was not focused around and dependent upon their personality. Each of the predecessors seemed to want the organization to go further than he was able to take the church. This value was openly communicated to the congregation, leadership and staff.

The Crucial Need for the Predecessor to Plan for the Next Season of Life

One of the most spoken to issues was that of the investment needed for the predecessor to define the next chapter of life. Reagan's interview introduced three big questions for a leader considering transition: a. "What will you do?" This is one of the important findings of this study: a transition is not simply from something but to something as well. A priority for the leadership board is to provide time, opportunity and openness for conversation with a leader as that leader grows older. Leaders need to have dignity and security to be able to talk openly as to what the organization requires and if they have the passion, focus and energy to lead into the next stage of organizational life.

The leader has been on the forefront of leading, change and growth. In the vast majority of megachurches the primary growth has taken place during this leader's tenure. Planning for life after life at the current organization is crucial both for the leader and for the organization she/he is leaving. It is crucial for the leader because of the need to continue to make a productive contribution to the world. More successful transitions for leaders are to something considered meaningful, satisfying and contributory for a cause. Logically as well, leaders who move to something meaningful, challenging and satisfying are less likely to meddle in the ongoing operation of the organization. More will be said on the topic of leader identity and leadership losses in transition in future pages. It is crucial for the organization because of the sense of closure and organizational separation experienced when helping a long-tenured leader in another direction.

The second question for transition is: Who will replace me? What kind of person is needed at this time in the organization's history and how is that person found? Two important questions are related to these questions: How is organizational assessment

performed and how is the position profile developed. In the cases considered, it appeared that no formal profile was actually ever developed. It was not that there was no profile but rather that the development of it was somewhat serendipitous, developing over time based on the important values of the organization—such as strong public communication. Community Church was the most intentional as to what kind of person they were seeking, but they were also the only church of the three that went outside the organization to find a successor. Even in their case, they had a handful of key attributes—an exceptional communicator, organizational DNA and a gifted leader—and allowed a time of testing in a key leadership role to surface other key traits. Positive synergy, a high level of trust, and humility were key attributes shared between the predecessor and the successor.

The third big question for the predecessor is: How will my life be funded? A consistent theme in interviews is that the leader was ready to transition emotionally before he/she was ready to transition financially. Reagan spoke of conversations with other pastors who have sought his counsel now that he has transitioned out of his role:

If you were putting them in emotional order . . . financial is always first, they don't have a clue how they can finish at this church that they spent all this time at. They feel, "If I quit before I get just fully vested financially, which means another 10 years past my prime, I don't have the money to do it. Secondly who would take this church and how would I do that and thirdly I need to go do something." I actually think that's almost the opposite order. That's how you feel it.

Often in church settings, financial matters represent an uncomfortable undiscussed dimension of leaders' lives. Sacrificial service is expected and unfortunately conversations on financial matters can be viewed as self-serving.

From conversations with other senior church leaders who are in their fifties, Reagan believed that financial concerns are delaying leadership transitions from taking place at the optimal time in leaders' careers. Leaders are ready to make a change from the stresses of every day operations but have about a ten year financial window in which they cannot afford to take a dramatic cut in pay. They are at the peak of their earning power in their present position and as a result they stay beyond their leadership effectiveness because of the practical concerns of the loss of income. Churches unlike the for-profit sector do not have a history nor precedence for providing financially for significant, long-term leaders in an organization.

Reagan's counsel to other megachurches is that if a leader has served the church for an extended tenure and is feeling the need to transition, the church leadership should take the initiative to develop a financial plan that allows the leader to transition with dignity. The continued presence of the predecessor is value added to the church. The church doesn't have to be the funding source. Long-term donors can be challenged to be continued investors in the leader's next stage of life ministry. Reagan shared counsel from his experience with other churches:

This isn't going to be true of every guy but a large number of megachurch pastors or even successful pastors who have something else they can do and who have proven themselves for ten, fifteen, twenty-five, in my case twenty-five years . . . why wouldn't you want to invest in them? That's probably your most secure investment 'cause you know what you're investing . . . and again unless they've been foolish with their money, the amount of money is not going to be super significant . . . significant but not super significant. And so it creates a platform off of which they can do ministry. And frees the church and then allows the church to do that.

Recognition of the Wearing Effects of Leading a Large Ministry

Another theme that has come up in interviews and in informal conversations with leaders is the theme of the wearing effects of leading a large ministry. The years of demands and pressure begin to take a toll. Other areas of personal interest open up and there is an increasing impatience with all the “stuff” required in day-to-day ministry. If the church is in a time of growth, capital expansion or organizational transformation, there is also a strong sense of responsibility—of duty and obligation. It appears that many leaders choose to stay beyond their effectiveness due to the sense of duty and obligation. An area that bears investigation is framed by the question: What are the signs, the internal markers that help both a church and a senior leader to understand when a transition may be most optimal?

Reagan spoke of his own situation as a “low-grade fever” and a weariness with the day-to-day demands of the church. Gage was open regarding not missing the criticism and the staff problems. Bob shared his sense that he was not himself. There was a weariness that robbed him of his enthusiasm for life.

The Timing of a Transition

The timing of a transition is important. The board members need to see the reasonableness of it at this point in the organization’s history and acknowledge that at some point a succession is going to take place. Again this indicates forethought, a willingness to change before absolutely being forced into a transition due to diminished skills, passion, capacity or health. In organizational theory the “S” curve, the sigmoid curve, is often raised as a crucial theory for long term organizational health and sustainability: The time to change is when there is still upward momentum versus waiting

until the organization is in decline. Reagan's version of the board's attitude towards transition was:

If the guy's of good sound mind and health, why wouldn't we want to make it now while he's really wanting to give energy to it rather than later?

And—the guys I'm talking to . . . are in their mid-fifties. And the church can understand if we go another five years we'll still be doing great as far as stability but if we look down our ranks we're going to be losing a lot of people who are young, who just aren't relating. And they might like the teaching and that kind of thing but they're not connecting emotionally. And we could feel some of that, where the young people who used seek us out now were kind of forming their own communities down the line because they felt like, "I don't relate to this guy. He's in a different season of life. He's financially in a different place. His children are in a different place. He uses stories that . . . talk about college and grandkids and we're just having our first child."

The Sense of Loss

The idea of delayed loss is an important dimension of transition. Other leaders interviewed expressed this idea but did not put language or a term to it. Because many of these leaders are motivated, their lives are full and often they have been under tremendous pressure. When they transition there is an immediate sense of relief and excitement. They get to step out of day-to-day operations. However, as the newness of the new chapter of life fades and relationships and roles change, the sense of loss of what they have known and experienced begins to set in.

Transition Represents a Different Kind of Leadership

The succession process is not the reduction of leadership responsibility. It is a change in the type of leadership responsibility. It is an opportunity to contribute as much as possible to bring about positive change to the organization. A number of the

interviews addressed the essential tasks of the predecessor as creating a vision for life in the organization without their presence and championing the new leaders and his/her team to the congregation.

The Successor

The three cases provided some insights regarding successors. Megachurches are major organizations: multi-million dollar budgets, vast facilities and properties, hundreds of ministries, large numbers of staff and thousands of volunteers. Outstanding public communication skills and relational skills are expected as well. This type of organization requires exceptional leadership. The kind of leader who can step into a situation like a megachurch does not want to be coddled and over-directed, yet in each of the three cases, humility and teachability were primary traits noted. All three of these churches believed that a period of overlap between the two leaders was an important part of an effective transition. It would require two special leaders to be able to co-exist for an extended period of time. All three of the successors shared some of the frustrations that developed as the transition period lengthened and each one expressed that a shorter transition would be more optimal.

Many of the interviews reflected the respect and appreciation expressed by successors for those who had gone before them. The respect and appreciation appeared genuine and yet also served as an important part of the transition. Events or words that were interpreted as demeaning to the predecessor resulted in particularly reactionary responses.

In the three cases, the early major bold decisions factored significantly into the consolidation and establishment of the successor's leadership. James of Community

Church and Jerry of Southpoint Church, announced complete relocation of campuses within the first year of their tenure. All three successors launched major ministry initiatives and high profile communication clarifying the vision that seemed to create a clarified enthusiasm for the future. In two of the cases, Community Church and Covenant Church, these major initiatives also set off a firestorm. At Community Church, the failure of the first major hire, coupled with the surprise announcement of relocation created significant negative sentiment that had to be overcome to move the congregation to a more stable mindset. The building of an exceptional senior leadership team has been a key part of the consolidation of James' leadership.

Each of the successors appeared to benefit from the long ramping-up process with increased visibility and responsibility. Another insight, however, regarding successors is that although a successor may be a very known person, trusted and recognized as an exceptional leader and communicator, there is a trust-earning process that a successor may go through to demonstrate his/her trustworthiness as the senior leader. Rex, Community Church elder, affirmed James as doing a good job as a leader but still challenged to find his own leadership voice and style as the predecessor and successor are still compared by many within the organization. Don, Covenant Church successor, reported serving on staff for seventeen years, "loved by the church" and the virtually unquestioned choice as the successor, yet he was shocked by the number of those who had been at the church for an extended number of years who did not give him the "benefit of the doubt or didn't trust positive intentions."

The Elder Board

One unexpected insight was the level of importance placed by the majority of those interviewed on the transition of the senior leadership board at the same time as the transition of the senior pastor. The impetus towards change of the board came from different individuals in each church (board, successor and predecessor) but the change was recognized as an important part of the long-term health of the church. Several individuals expressed the belief that the new leader should be able to have individuals that are loyal to him/her and that the skills required for board leadership in the past may not be the same skills needed for leading in the present and future.

The Congregation

An insight that is not profound but is important is that congregations are not monolithic entities. They are not homogeneous entities but are extraordinarily diverse with different interests, loyalties, preferences and expectations. The interests, loyalties, preferences and expectations are often unspoken but the differences appear to be brought to the surface and voiced during a transition. The tranquility of the church under the predecessor is rocked by the apparent surfacing of unforeseen differences, differences that appeared to have been resident all along but simply at rest.

Nate, Covenant Church board chairman, spoke of the sensation of having 18,000 critics during certain times of change. He gave an interesting picture of three major groupings of the congregation that formed during three major seasons of ministry at Covenant. The original group that had the tightest connection to the predecessor struggled most with the transition. Interviews at all three churches strongly urged that transition of leaders be incorporated into the overall vision and values of the church.

The Staff

Each of the cases gave indications of staff situations that were inherited by the successor. Dealing with these situations and then building one's own staff team was a key priority early in the tenure of each of the successors. James, Community Church successor, was the most delayed in putting his team into place. It was costly in terms of staff stability, congregational trust and his own emotional health. Each of the successors brought a different style of leading that necessitated changes in the senior leadership of the staff. Staff changes appear to be an expected part of the transition of leaders.

Succession Planning

Each of the three cases represents churches known for their organization and exceptional leadership so it was not a surprise that advance preparation and forethought was given to leadership transition. What was a surprise was that succession planning was largely informal, largely evolving over time with a few false starts and stops. Community Church pursued three different individuals over a period of years before settling on James. Transitions take a great deal of forethought and should start some years before an actual transition is needed, yet flexibility and responsiveness to what actually unfolds is required.

In each case a longer time period was identified than was actually needed or even desired. In these three cases a period of no longer than two years was identified as the period of overlap if there was a positive relationship between the predecessor and the successor. Again the synergy between the successor and the predecessor was considered a key aspect of the succession planning scenario. In each case as well, the importance of

making an early transition financially feasible by the predecessor was deemed as counsel for other churches considering transition.

Each of the case studies suggested the importance of thinking well beyond the mere transition of two individuals in the succession planning process. The transition of the staff, leadership board and congregation needs to be incorporated into the planning and communication strategies developed to help each of the groups anticipate the path that the succession might take.

CHAPTER 8

SUMMARY, CONCLUSIONS AND SUGGESTIONS FOR FUTURE RESEARCH

Review of the Purposes of the Dissertation

The purpose of this study was to examine the succession processes of senior pastors in megachurches. The three studies revealed that few changes have greater impact on an organization than the change of the senior leader. The cases examined were considered examples of successions that were effectively navigated in that finances and attendance remained stable, ministry momentum was viewed as increasing and neither a major power struggle nor split took place. These cases were examples of relay successions—there was a period of overlap between the predecessor and successor. These churches did not experience the time of uncertainty experienced by many ministries when a senior leader departs and there is a time gap between his/her departure and the identification, arrival and employment of the new leader. These things said, the case studies illustrated the disruptive and complex nature of the transition of the senior leader.

Megachurches are a relatively new sociological phenomenon and so little is known about the succession processes of senior pastors in these churches. With the average age of senior pastors of fifty-three in these churches and the great proliferation of these churches in that past two decades, a significant number of these churches will experience for the first time the transition of their senior leader. This study on succession process sought to address a gap in the literature regarding succession in megachurches by offering first-hand descriptive accounts by those who have lived through the succession process. The purposes of the dissertation were as follows:

- This study was an examination of the succession process of senior pastors in megachurches. Little is known regarding this process since historically there have been so few of these churches at any point in history until the past two decades. Many of the megachurches of the past fifty years were one-generation churches, experiencing tremendous growth and success under a dynamic leader and then experiencing significant decline following the departure of the leader. The case studies gave some insights into the complex multi-year process entered into by churches interested in multi-generational longevity as ministries. The thick description resulting from the studies offers insights as to the types of issues that megachurches will encounter when entering a transition process. These insights include: the extraordinary complex, multilayered change processes involved in leadership succession; the four groups to be considered in transition—transition is not simply the exchange of leaders; the deeply personal nature of transition for those involved; conflicts and challenges as an inevitable and perhaps helpful part of transition; challenges to the simplistic notion of insider and outsider and the idea of socialization; and finally, transitions as leadership in action.
- This study sought to address a gap in succession literature in general and succession literature in megachurches specifically by offering first hand descriptive accounts by those who have lived through the succession process. In the hundreds of articles reviewed for this study, succession research was largely archival. There was a significant gap in the literature regarding conversations with leaders who over a period of years experienced the dynamic process of succession. This study provides rich conversations with leaders.

- The study provided an opportunity to study leadership processes and to enrich understanding of organizational change. Leadership succession fundamentally is about change. The stories of those interviewed spoke of change on many different levels and with the different stakeholders. The removal of the predecessor triggered changes throughout the organization. In the three cases, though the predecessor played a key role in recruiting and selecting the successor, there was not the assumption that the successor would simply continue the policies and practices of the predecessor. Shared values were crucial but the expression of those values and the implementation of a successor's unique style of leading were simply expected. It seems reasonable to assume that—because of the unique, powerful dimension of public communication in the senior pastor role versus the production of some material product, the regular interface as a vision caster, and the generational changes often accompanying succession of long-time leaders—substantial change will be perceived, if not experienced. The idea of process was an important focus for this study. This was stated explicitly because studies of leader succession have typically been situated as events and outcomes. Succession clearly is a long process experienced differently by the different players.
- This study sought to holistically describe what goes on in a succession process and to build a knowledge base for developing theory rather than test hypotheses. This study proposed to describe, analyze and compare the succession process of senior pastors in three megachurches. Only five interviews were conducted in each church and so the perspectives are limited. However, the interviews did yield thick description. The candor of the participants was remarkable and their

enthusiasm of sharing their experiences encouraging. Although these churches sought to learn from other megachurches that had gone through similar transitions, the learning was informal and undocumented. There was strong sentiment among many of those interviewed regarding the importance of this study, including the importance of making the findings accessible to other churches about to enter this crucial season of church life.

Review of Research Questions and Study Summary

General Research Questions

There were several general questions raised. The first was a descriptive question: What is the succession process in megachurches? This study provides some of the first descriptive accounts of the succession process and personal experiences of five different leaders within each church. There were some general phases that can be identified for each succession but the process was by no means unidirectional, linear or static. First, there was the realization by each predecessor and other leadership that discussion regarding succession was desirable. This discussion was triggered by age considerations, the desire to step out of the pressures of leading a large ministry, and an invitation to pursue a leadership role in another organization. Second, there was the lead-up time including the identification or, in one case, the recruitment of the successor. Third, there was the public identification of the successor initially as a key leader and a mentoring process by other senior leaders. This phase served as a proving time for the successor to demonstrate public and private capabilities as a leader. The three cases examined chose a relay succession that included several years of overlap between the two leaders. This

third phase included the transition of various roles and functions from the predecessor to the successor. Fourth, there was the exit of the leader and symbolism such as the passing of the baton or the knighting of the new leader. Finally, there was the post-succession aspect of the transition for all four groups impacted by the transition. This process is a multi-year process with deep complexity. Although there are these observable phases, the purpose of this study was not to prescribe a plan but rather to describe holistically the process.

The second and third questions raised were: What factors influence the presence of a succession plan or the lack of a plan? If there is a plan, does the actual process differ from the process of those churches that do not have a plan? Again, the purpose of this study was not to generalize to a population. The study did not include any churches that did not have a plan. The plans of each of the three churches were informal. The initiation of the predecessor and the board seem to be contributing factors to conversations at least identifying the importance of planning for the future. In the case of Covenant Church, the initial plan was simply to buy a key-person life insurance policy in the event of a tragedy and an informal comment publicly that the current associate would simply pick up and carry on if something happened to the predecessor. All three churches, although considered nationally as exemplars of leadership and planning, did not have formal documents detailing the process. The plans were more serendipitous—more art than science with a general direction set, broad values and skills assumed and leaders who proved themselves as worthy candidates over time. Community Church’s process was more concentrated since they did not have a suitable internal candidate.

Supplemental Questions

The first supplemental question raised what actions, beliefs, attitudes, social structures and processes exist in senior pastoral transitions and identification of the key players. Clearly in the three cases considered, a relay succession with overlap of the two leaders was considered crucial to the maintenance of ministry momentum and organizational stability. There was the assumption that the successor would share the same organizational core values including beliefs about leadership and the nature of the expression of church. Social structures and key players included the transitioning leaders, the leadership board, the staff and the congregation. Congregations are not monolithic entities. Recognition of the diverse groups within a congregation and recognition of the types of responses to the needs, concerns and losses within these groups is essential to an effective transition. Transition of the board, an important social structure within the church, was an unexpected finding in all three cases.

The second supplemental question considered whether or not any succession conversations or succession planning occur before the first knowledge of a coming transition. The conversation seemed to be most explicit in the case of Community Church. Almost ten years prior to the transition, the three executive team members talked about their vision for the “hundred-year church” versus the “thirty-year church.” They discussed the fact that shortly after their departure they would be “pictures on the wall,” virtually unknown by many of those who attend. Two of the three felt that they could remain involved in some capacity but the third, Reagan, by virtue of personality and his directional leader role, realized that he could not stay involved as a staff member. What he did not anticipate was that he could not stay involved as a board member either if the

transition was to succeed. Each of the predecessors sought out younger communicators to share preaching and leadership responsibilities years before formal conversations of a transition took place. This eye towards the future appeared perhaps fortuitous by the larger congregation but appeared to be quite intentional on the part of the predecessor. The follow-up question asked was whether or not the presence or absence of these conversations and advance succession planning appear to make any difference in the outcomes. In these particular three cases, it does suggest that good leaders care enough about the future of the organization that he/she seek to imagine life without their presence. The attitude of the leaders—recognizing that he/she is not irreplaceable and that succession at some point is inevitable—and the vision cast for an organization that does not rest solely on their personality or presence appears crucial in not fostering a dependency by the congregation, staff and leadership.

The third supplemental question considered the development of the successor profile: What contextual elements/organizational values were regarded as most important and how did those elements shape the desired successor characteristics? What organizational antecedents shaped the succession process? Public communication skills and exceptional visionary skills were clear criteria for the successor. Character issues such as humility, integrity and others were assumed. Each church was clear regarding the need for the presence of the organizations DNA in terms of expressed ministry values. Again, there was not the formalization of a list of characteristics. Testing instruments did not appear to be used. Subjective criteria were mentioned such as likeability, trust, enjoyment of one another, and relational focus. There were not significant antecedents in the three churches. The churches were all in a strong period of growth; there were no

major organizational crises; none of the predecessors was being forced to make a change; and in all cases the talk of the transition took place before a change had to occur.

The fourth supplemental question raised the question as to what successor profiles reveal about beliefs regarding the senior leader and that leader's influence. Although interviews in each of the three churches included explicit statements that the churches were not personality-centered nor built around a person, clearly in each church the senior pastoral role has enormous influence. The reported responses of various segments of the congregation and the launch of key initiatives following the transitions would indicate the influence of the role. Even in the case of Community Church which claimed a more team orientation to the senior leadership, a point person—a directional leader of exceptional skill—was considered essential to the continued effectiveness of the church.

The fifth supplemental question asked how a successor was identified and selected and whether or not any tools were utilized to identify particular leadership and personal traits. The sixth question also raised issues regarding selection. Some of the responses to supplemental question three should be reviewed. The predecessor in all three of these cases was the leader of the successor identification process. Feedback from the board, staff and congregation were all solicited and considered at various levels. In all three cases, identification of a likely candidate based on either organizational history, or proven leadership and communication in other high profile settings was important. The “likely candidate” then was given increased visibility and responsibility as the means of testing whether or not the candidate was a fit for the congregation and capable to respond to the complex demands of senior leadership at a megachurch. Although the predecessor and the board, overwhelmingly in these three cases, made the choice of successor, the

staff and congregation had informal input into the process. Some congregations require successor approval by congregational vote. The absence of the requirement of a formal congregational vote, in the three cases considered, did not mean that congregational members did not have a vote. The vote took the form of various forms of informal communication, the change in giving patterns or in the case of each of the churches, the decision by some congregational members to leave the church entirely. During the testing period, the responses of the congregation to the successor gave indications as to the assessment of the style and capabilities of the successor.

The seventh supplemental question considered the challenges that occurred in a succession process and in turn the responses to these challenges. Extensive reporting has already been given on this question. However, some additional clarification can be given as to the responses. In all three cases, increased communication (in some cases dramatically increased frequency, level and specificity of communication) took place once there was an awareness of challenges. Open, authentic communication particularly by the successor and the chairperson of the board was considered vital. Recognition of the concerns as real was one important strategy. In other words, there wasn't a bypassing of the concerns simply to sell the benefits as change. Recognition was given to the difficulty of change. In terms of congregational groups, specific groups were targeted and the communication messages shaped to the needs and concerns of those groups. In each of the cases, identification of what was changing and what was not changing was a key component of communication. Interviews from two of the churches, Southpoint and Community Church, indicated that in reflection, more could have been done on the part of "retiring" elder board members and the predecessors in terms of championing a vision

for the future without them, endorsing the successor and his leadership team and in communicating their own excitement about the new chapter in their lives post ministry leadership.

Setting a course and staying a course seemed to be important strategies employed by predecessors in the midst of particularly turbulent times. Unqualified support was enjoyed by all three successors in the midst of the most tumultuous times. The absence of this support could very well have led to different outcomes.

The eighth supplemental question considered the issue of socialization. Home grown leadership was considered important by all three churches. The predecessor in all three cases played a very key role in the socialization (orientation/mentoring) process. There was a period of learning by watching and then a learning by doing. The increasing entrustment of responsibilities that included regular feedback from the predecessor and other key leaders was an important part of successor development. The rigorous pre-screening of the individuals before their joining the staff regarding the enduring values of the church was then supplemented by the observation of the successor's words and actions. Were his words and actions expressions of what mattered most to the church?

The ninth supplemental question raised the issue of evidence of a successful transition. This was not actually formally discussed in the interviews. The unspoken evidence included continuity of the ministry and ministry momentum, transition of the entire leadership team to the next generation of leaders, numeric and financial stability and new ventures expanding the opportunities and influence of the church. The interviews did reveal what was considered as an unsuccessful transition: the decline of the church after the predecessor, the loss of continuity (initially experienced by

Community Church until the seating of the new staff leadership team) and an extended period of congregational conflict.

The final question: what differences exist between succession processes in megachurches? This very limited study does not have the type of breadth required to respond to this question. Although the churches selected for the study were diverse in terms of size, location, and denominational affiliation, the similarities versus the differences were striking. The experiences of the individuals varied including the level of loss experienced by the predecessors. Each of the successors experienced times of deep conflict following the transition but again each context was unique. The words of counsel provided by those interviewed for those churches about to experience transition all were qualified by remarks such as, “There is no one size fits all,” and “We are not the model: every church situation is different.”

Methodology Review

The multiple case study approach using Kvale’s (1996) concept of a semi-structured life world interview was a very effective approach for this study. The multiple cases, though limited to three, allowed some comparison as to the types of issues that megachurches experience in a senior pastoral transition. The researcher’s status as a peer, a megachurch pastor, may have had some influence as to the willingness for these leaders to be interviewed and then their candor in the interview process. An interviewer without similar standing may not have had the access or sense of identification with those interviewed. The leaders not only wanted to talk about their experiences regarding this event that had never really taken place in any of the three organizations, they also wanted

to make sure that other churches receive the benefits of their learning and experiences during the process of transition.

The time limit imposed, seventy-five minutes, allowed for a good, extended conversation. There was adequate time to explore the questions raised in the interview guide. Many more questions could be raised now that analysis has been started. The decision to transcribe the interviews in their entirety, though a tedious task, proved to be a good decision. The transcriptions proved very valuable in data analysis and subsequent write-up. The transcriptions will make continued work on the subject much more accessible in the future.

Extensive use of archival information primarily obtained through internet searches provided background on the churches. There was very limited accessibility to corporate documents such as board minutes, financial reports and attendance records. The concerns regarding confidentiality as well as the volume of requests that these churches receive were obstacles to securing these items. Much of the information sought in these documents was received in the course of the interviews.

Although it would have been impractical to add additional cases for this study simply because of the sheer volume of data, the study of succession in leadership in any type of organization would be enriched by use of the methodology employed in this study.

Areas for Future Study

General Areas for Exploration

The literature for succession in organizations in general could be greatly enriched through the case study methodology (including the in-depth interviews). The stories of those interviewed revealed the many complexities and dynamics experienced in leadership succession. The three case studies considered in this dissertation only introduced the richness of experiences to be explored and the opportunity to contribute to understanding in this area of literature. Although this study was largely descriptive, other studies designed to more sharply focus on transition as leadership in action would be both interesting and useful.

Longitudinal studies employing in-depth interviews as a transition is unfolding would greatly enrich the literature. This study included much retrospective reflection on the process and then reflection on the current experiences post-departure by the predecessor. The stories from those in the midst of the experience would be very valuable. Broadening the churches considered to include those who did not either chose or have the luxury to have a relay succession would add breadth and additional insights. Also churches in which there was either a forced exit of the predecessor or experienced an unexpected or sudden departure by the predecessor might indicate a whole different set of experiences and dynamics.

Although there has been a proliferation of megachurches in the past two decades the number of these churches still is relatively small (less than 2,000). A general survey of a broad number of these churches could be conducted regarding the presence or absence of conversations and any formal succession planning.

Other Areas for Future Study

Role and Decision-Making Ambiguity During Leadership Succession

One of the themes repeated in the majority of interviews and in all three churches was the ambiguity that crept in as the transition lengthened. Succession literature could be enriched by qualitative methods that explore the transition process from this perspective. It might be suspected that this ambiguity exists, not only in relay succession but in other types of succession in which there is the absence of a senior leader for a time or there is one senior leader one day and then a new senior leader the next day. Who makes decisions? How do decisions get made? How does decision-making get transferred over time? How does “the role” get transferred over time as “individual roles” are transferred? These are matters that were not explicit in the three cases explored and resulted in frustration, confusion and in some cases organizational morass. A number of those interviewed marveled that the transition went as well as it did given the ambiguity, role confusion and stepping on one another that occurred in the process of the transition. A good deal of humility, granting the benefit of the doubt and, in the case of the successor, patience that this season will soon pass.

Leadership and Decision Style as a Leader Becomes More Secure in His/Her Position

Each board member interviewed noted a different style of leadership exercised by the successor that tended to be more collaborative than the predecessor. Was this change in leadership style related to a different kind of leader or is it possibly related to the amount of leadership collateral perceived early in the leader’s tenure? Several interviews from Community Church suggested that the predecessor became more unilateral in his

final years simply due to the volume of work, the complexity of the organization and the weariness with organizational process. Are there generational differences in terms of decision making or is it simply that as a leader is getting established greater care is taken to collaborate and to build alliances? Additional study in this area would enrich succession literature.

Trust Formation

One of the more fascinating findings was that although two of the predecessors had long tenure (one extraordinarily long tenure) and great admiration of their capabilities as the senior associate, each of them experienced a lack of trust regarding their capabilities, intent and judgment as the senior pastor. As insiders, home grown leaders, neither one of them expected to have this push back on their leadership and questioning of their person. Each of the leaders including the successor in the third church were known. None of them did a “cold start,” showing up day one as the senior pastor. Yet, clearly there is a trust formation process, a building of credibility that must take place in the new role. Additional study as to what is involved in trust formation including key early decisions—wins or losses, environmental issues, antecedent events or inherited situations, all might play into this. How trust formation differs for insiders versus outsiders would be an important distinction. Gage, Covenant Church predecessor, observed that when you are an insider, there is no honeymoon period. Other interesting avenues of research could include the benefits of being an insider versus the benefits of being an outsider.

Transition as Directed Conflict

Transitions are rife with opportunities for conflict. All the established ways of doing things appear to be in flux during this time. It appears that organizations tend to want to eliminate conflicts or to minimize conflicts but an interesting study would be organizations that choose to use the emergence of conflicts as key opportunities for growth, understanding, acknowledgement and definition. Examination of leaders who demonstrate particular skills in navigating these conflicts to maximize organizational learning and development could yield substantial insights.

Emotional Intelligence

One of the observations in the course of the interviews was the rare combinations of skills required the negotiation of treacherous organizational waters during transition. Two of the three leaders in particular, exhibited apparent skills at perceiving, assessing and managing their emotions and the emotions of board, staff and congregational members. No literature was reviewed that considered this application of the emotional intelligence literature to succession.

Level 5 Leadership

This study did not permit exploration of succession processes to Collin's Level 5 Leadership Theory. Covenant Church appeared to have a Level 5 predecessor and a Level 5 successor. Deep humility and intense resolve were words used by each one interviewed. The context of megachurches could prove to be a fertile ground for Level 5 leadership. Another of Collins' (2001b) ideas is that future Level 5s seek out current Level 5s even though they may not be aware of the reasons why. Each of the three churches would

provide as possible research sites as to why the successors choose to align themselves with the church. In each case, it was the recruitment of the predecessor that led to the successor joining the staff and serving under the predecessor.

Final Thoughts

This study was deeply enriching to the researcher and has provided a foundation for what is to be a part of the next chapter of life. The study was not only intellectually stimulating but also offers the promise of great utility in opening conversations with leaders and churches that are about to enter the transition process. The study merely scratched the surface of a very rich research area. The study as well provided practical demonstration of the value of qualitative research in the leadership field that has largely developed theories with non-senior leaders, utilizing quantitative methodologies.

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APPENDIX A

DRAFT OF QUESTIONS FOR INTERVIEW GUIDES

Regarding Successors

- When did the first conversations take place regarding succession/transition? Can you describe those conversations? Who initiated those conversations?
- When the first conversations take place did you have a specific transition time-frame in mind? Was there a succession plan in place ten years ago?
- What was your role in the succession process?
- Was it primarily your initiative that got the process started?
- If it was your initiative, what factors led to your decision that it was time for a transition to take place?
- If it was staff/board, what factors led to the decision to start a succession process?
- Who led the process? The discussions?
- Was there a succession plan and then a person? Or did a person come to your attention and then the development of a plan?
- Describe how the communication process unfolded to staff/key volunteers/congregation regarding a succession plan and in time the selection of a new leader.
- What would you regard as your key attributes/characteristics/skills/gifts? What might others around you say?
- What were your most valuable/important contributions to the church in general? What were your most important contributions to the succession process?
- What would your leaders say were your most important contributions to the church? To the succession process?
- As you look back over your years at _____ (church) what are two or three defining events/time periods formative to the church/formative to your leadership.
- What are your beliefs about leadership that shaped the profile of your successor?
- What attributes/characteristics/skills did you believe were most essential for your successor to possess?
- What was going on at _____ that shaped the profile? (The antecedents). What kind of leader did _____ need for the next season of life?
- Who developed the profile of your successor? How did it get developed? As you got into the process did anything change in the profile? Why?
- How did you go about finding that successor? Any false starts? Individuals on staff or outside staff that you thought might be the person and then it became apparent that it wasn't going to be a good match? What did you learn through that process?
- Did you recruit multiple individuals and then see who rose to the challenge?
- Who was involved in the screening and then choosing of the new leader?

Prior to the transition, what did you believe a successful transition looked like? What were some of the marks of a successful transition? Was this formally discussed/documentated or primarily assumed?

In what ways was your view of what constituted successful transition change or be further strengthened?

Leader socialization is a big part of succession literature. Every church culture is unique, complex. There are unique ways of doing things, of making decisions, of communicating, of leadership process.

You were a long-tenured leader. The church congregation/the leadership/staff became used to your presence; there was trust built over a long period of time including through times of crisis. What did you do to prepare the church/leadership/staff for a future when you were not involved in the ongoing direction of the ministry including dealing with any major crisis?

There is something in succession called the shadow effect . . . a long-tenured leader's presence . . . staff/leadership/congregation saying . . . this is the way that _____ did it. How did you prepare the church for dealing with the shadow effect? Minimizing it? Is there a perception that this is your church or was there the multiplicity of leaders?

Conventional wisdom says that the predecessor needs to disappear off the scene to give the new leader the greatest possibility of succeeding. Can you respond to that idea or counter that idea (in the case of a still present leader)?

What needs to happen/be present for the predecessor to stay on site/active in the ministry?

What are the most important actions/decisions that a predecessor makes/takes to give the successor the best possibility of succeeding?

What are the most important actions/decisions/attitudes that a successor needs to take/make/have to have the greatest possibility of success?

What were some of the greatest "take-aways" from the succession process? What did you learn? What would you do differently?

What have been the greatest challenges of the succession process?

Was there any senior staff changes that you felt needed to take place prior to the successor taking the directional role?

Did the successor have a choice of his senior management team?

If you were to use some short words, phrases to describe the whole succession process, what would they be?

Did you offer any words of counsel to your successor prior to your successor taking his role?

Your successor is now _____ (months, years) into the process. What observations can you make regarding how the process is going? What is your perception as to how the transition is going? Positives? Concerns? If you were to give affirmations to your successor what would those be? What would be your words of counsel/caution?

What would be the key pieces of advice/counsel you would give to another directional leader/another leadership team that is entering the conversation and process of succession?

Who were your mentors in working through succession/transition issues?

When should the first conversations regarding succession take place? What is the minimum that needs to be defined if a senior leader believes that transition is not coming in the next five-ten years?

In your opinion when should a directional leader transition? Any counsel you could offer? Who suffered? Who benefited from the time period in which this transition unfolded?

What have you struggled with most in the change of roles?

How did you prepare for life after being the directional leader of a ministry after _____ years of serving in this role? Looking back, is there anything you would have done differently to prepare?

APPENDIX B

DETAILED LIST OF CHURCHES IDENTIFIED AS HAVING A SENIOR LEADER TRANSITION SINCE THE YEAR 2000

Tier One, Voluntary Departures, Succession Since January 2003

Bellevue Baptist Church, Cordova, Tennessee, church of 10,000 (29,000 members)

<http://www.bellevue.org/templates/cusbellevue1103/default.asp?id=1360>

Address: 2000 Appling Road, Cordova, TN 38016

Phone: 901.347.2000

Adrian Rogers, former senior pastor; retired and now deceased; served for 32 years;
retired in March 2005; age 74 at retirement

Steve Gaines, senior pastor since August 1, 2005

Calvary Church, Grand Rapids, Michigan, church of 4,000

<http://calvarychurch.gospelcom.net/index.htm>

Address: 707 East Beltline NE, Grand Rapids, MI 49525

Phone: 616.956.9377

Ed Dobson, former senior pastor; served for 18 years; left in 2005 due to illness

Jim Samra, current senior pastor; senior pastor since June? 2006

Calvary Fellowship Church

Address: 95 West Devon Drive, Downingtown, Pa 19335

Phone: 610-363-7171

Carl Green, Senior pastor (20 plus years) retired December 2006

Jeff Allem, January 2007

Central Christian Church, Las Vegas Nevada, church of 8,000-10,000

<http://www.centralchristian.com/main.html>

Address: 1001 New Beginnings Drive, Henderson, NV 89011

Phone: 702.735.4004

Gene Appel, former senior pastor; currently lead pastor at Willow Creek Community
Church, South Barrington, Illinois; served for 18 years; left in May/June 2003

Jud Wilhite, current senior pastor; senior pastor since fall 2003

Mike Bodine, senior leader; on staff since 2000

The Church at Brook Hill

Address: 3145 Brook Highland Parkway, Birmingham, AL 35242

Phone: 205.313.7777

Senior/founding Pastor retires September 2005 after 15 years of ministry

Dr. David Platt, June 11, 2006 (age 28)

Fairhaven Church, church of 4,000

www.fairhavenchurch.org

Address: 637 E. Whipp Road, Centerville, OH 45459

Phone: 937.434.8627

Peter Schwalm, senior pastor 1983-200?

937. 433.3916 or email peteschwalm@peteschwalm.com

David Smith, Senior Pastor, 2005

Fellowship Bible Church, Little Rock, Arkansas, church of 5,000

<http://www.fbclr.org/fbchome.aspx>

Address: Hinson Road & Napa Valley, Little Rock, AR 72212

Phone: 501.224.7171

Bill Wellons (1978), Bill Parkinson (1978), Robert Lewis (1980) shared the leadership with Robert Lewis being the directional leader

Tim Lundy joined the teaching team in 2001 and assumed directional leadership of the church body and staff in 2003; Bill Wellons and Robert Lewis stepped out of their leading roles

Fellowship Bible Church North, Plano, Texas, church of 2,200

<http://www.fbclr.com/fbchome.aspx>

Address: 850 Lexington Drive, Plano, TX 75075

Phone: 972.783.8800

Gene Getz, former senior pastor and currently pastor emeritus; served for 22 years; retired in December 2003

Jeff Jones, senior pastor since January 2003; was appointed in March 2000 to begin a seven-year transition with Gene with increasing leadership responsibilities;

Gene announced his plans to retire early and pronounced Jeff ready to assume full senior pastoral responsibilities

First Baptist Church, 7,000 member church

Address: 1000 W. Airport Freeway, Euless, TX 76039

Phone: 817.267.3313

Claude Thomas, resigned 2004

John Meador, August 2006

First Baptist Church, Jacksonville, Florida, church of 6,000

<http://www.fbcjax.com/>

Address: 124 West Ashley Street, Jacksonville, FL 32202

Phone: 904.356.6077

Homer Lindsay, former co-pastor; came as co-pastor with his father in 1969 (his father had been pastor since 1940; he retired in 1975); died in 2000

Jerry Vines, former co-pastor; came as co-pastor in 1982; retired May 2005 (created significant controversy in 2002 with remarks regarding Muslims)

Mac Brunson, senior pastor since February 2006

First Baptist Church, Orlando, Florida, church of 7,000 in weekend attendance
<http://www.fbcorlando.org/templates/cusfbcorlando/details.asp?id=24347&PID=96640>

Address: 3000 S John Young Parkway, Orlando, FL 32805

Phone: 407.425.2555

Jim Henry, former senior pastor; served for 28 years; retired March 31, 2006

David Uth, senior pastor since April, 1, 2006; came as co-pastor, May 2005

First Presbyterian Church, Colorado Springs, church of 2,800

<http://www.first-pres.org>

Address: 219 East Bijon Street, Colorado Springs, CO 80903-1392

Phone: 719.884.6100

John Stevens, former senior pastor for 36 years; retired

Jim Singleton, senior pastor since August 2005

First Presbyterian Church, Orlando, Florida, 1,800-2,200

<http://www.fpcorlando.org/pages/1.asp>

Address: 106 East Church Street, Orlando, FL 32801

Phone: 407.423.3441

Howard Edington, senior pastor 1981-2003, Retired January 2003

David Swanson, senior pastor since September 2004 (came from Covenant Presbyterian Church, Ft. Myers, FL)

Immanuel Bible Church, church of 3,000 members and attenders

www.immanuelbible.net

Address: 6911 Braddock Road, Springfield, VA 22151-3602

Phone: 703.941.41224

Predecessor (unknown at this time)

Dr. Ron Jones, currently Executive and Teaching Pastor, Pantego Bible Church
approved by congregation March 25, 2007.

Lake Avenue Church, church of 3,500

http://www.lakeavefamily.org/article.asp?id=af_cm_ourhistoryb&from=search&term=Gordon+Kirk

Address: 393 N. Lake Avenue, Pasadena, CA 91101

Phone: 626.844.4700

Gordon Kirk, senior pastor 1991-2005; resigned September 30, 2005 in reaction to strong criticism from a vocal minority

Dr. Gregory L. Waybright (current president of Trinity International University in Deerfield, Illinois. Approved March 25, 2007

Pantego Bible Church, Fort Worth, Texas, church of 2,000

<http://www.pantego.org/>

Address: 8001 Andersen Boulevard, Fort Worth, TX 76120

Phone: 817.274.1315, extension 124

Randy Frazee, former senior pastor; currently teaching pastor at Willow Creek Community Church, South Barrington, Illinois, served for 15 years; left in late spring 2004

David Daniels, current senior pastor; senior pastor since November 2005;
ddaniels@pantego.org

Rocky Mountain Calvary Chapel, Colorado Springs, Colorado, 4,400 weekend attendance

<http://www.rmcalvary.org/rmcweb/index.jsp>

Address: 4285 N Academy Blvd., Colorado Springs, CO 80918

Phone: 719.597.1133

Brian Michaels, senior pastor June 1, 2005; left to pastor Calvary Chapel, Spring Valley, Las Vegas, http://www.ccspringvalley.org/links_main.html

Eric Cartier, senior pastor since June 1, 2005

Southeast Christian Church, Louisville, Kentucky, church of 20,000

<http://www.southeastchristian.org/>

Address: 920 Blankenbaker Parkway, Louisville, KY 40243-1845

Phone: 502.253.8000

Bob Russell, senior pastor 1966-2006, retired May 2006

David Stone, on staff for 18 years; senior pastor since January 2006

Southland Christian Church, Lexington, Kentucky, church of 8,000

<http://www.southlandchristian.org>

Address: 5001 Harrodsburg Road, Nicholasville, KY 40356

Phone: 859.224.1600

Mike Breaux, former senior pastor; currently teaching pastor at Willow Creek Community Church, served for 7 ½ years; left in September 1, 2003

Jon Weece, current senior pastor; senior pastor since September 3, 2003; was formerly on staff as the adult discipleship associate pastor

The Chapel, Akron, Ohio, church of 8,000

<http://www.the-chapel.org/>

Address: 135 Fir Hill, Akron, OH 44304

Phone: 330.376.6400

Knute Larson, senior pastor 1983-present

Paul Sartarelli, successor and co-pastor since February 2006; succession process to take two years

The Church on the Way, Van Nuys, California, church of 8,000

<http://www.tcotw.org/location.html>

Address: 14800 Sherman Way, Van Nuys, CA 91405

Phone: 818.779.8000

Jack Hayford, senior pastor 1969-2004; retired

Jim and Alice Tolle, senior pastors since September 2004

Willow Creek Community Church, South Barrington, Illinois, church of 20,000

<http://www.willowcreek.org/>

Address: 67 East Algonquin Road, South Barrington, IL 60010

Phone: 847.765.5000

Bill Hybels, founder and senior pastor October 1975

Gene Appel (2003), directional leader since 2005

Tier Two, Voluntary Departures, Departure of Senior Leader Prior to 2003
but After 2000

Bell Shoals Baptist Church, church of 3,000

<http://www.bellshoals.com/about/timeline.asp>

Address: 2102 Bell Shoals Road, Brandon, FL 33511

Phone: 813.689.4229

Dr. Ken Alford, senior pastor October 1993-February 2002; left to go to Crossroads
Baptist Church, Georgia

Dr. Forrest Pollock, senior pastor since November 2002

First Baptist Church, Houston, Texas, church of 3,000

<http://www.houstonsfirst.org/index.htm>

Address: 7401 Katy Freeway, Houston, TX 77024

Phone: 713.681.8000

Joe Bisagno, senior pastor 1970-2000; retired

Dr. David Self, interim pastor 2000-2004

Gregg J. Matte, senior pastor since April 2004

Woodmen Valley Chapel, Colorado Springs, Colorado, church of 6,000

<http://www.woodmenvalley.org/index.cfm/pageID1523/index.html>

Address: 290 E Woodmen Road, Colorado Springs, CO 80919

Phone: 719.599.8652

Jim Tomberlin, former senior pastor; currently at Willow Creek; served for 9 years;
left in August 2000

Matt Heard, current senior pastor; senior pastor since April 2001

Tier Three Involuntary Departures

Calvary Church, Charlotte, North Carolina, church of 2,400

<http://www.calvarychurch.com/site/nav.cfm?cat=18&subcat=117&subsub=75>

Address: 5801 Pineville-Matthews Road, Charlotte, NC 28226

Phone: 704.543.1200

Glenn Wagner, senior pastor 1997-2004; resigned September 5, 2004 for plagiarism

Dr. John Munro, senior pastor since January 2006

First Baptist Church

Address: West Palm Beach

Steven Flockhart, 3 months, August 27, 2007 resigns due to lying about credentials

First Baptist Church, 4,000 member church

Address: 118 North Palmetto Avenue, Daytona Beach, FL

Phone: 386.253.5691

David Cox, co-pastor with Bobby Welch, 2003-August 2006; (Welch retired after 32 years) Senior pastor 6 months; resigns in the midst of turmoil, January 25, 2007

Valley View Christian Church, Dallas, Texas, church of ?

<http://www.vvcc.org/home.asp>

Address: 17601 Marsh Lane, Dallas, TX 75287

Phone: 972.245.8822

Dennis Slaughter, senior pastor emeritus, senior pastor from 1970-2001

Ron Key, former senior pastor; led a breakaway from Valley View in the summer of 2005; was worship pastor from 1980 and senior pastor for four years (2001-2004)

Barry McCarty, senior pastor since March 2004

Tier Four, Churches with Vacancy in Senior Pastor Position/in Process of Looking for a Successor

Christ Lutheran Church

<http://www.together-in-christ.org/DesktopDefault.aspx?tabindex=0&tabid=33>

Address: 11720 Nieman, Overland Park, KS 66210

Phone: 913.345.9700

Senior Pastor left summer 2006

Coral Ridge Presbyterian Church, church of 10,000

D. James Kennedy, heart attack, December 2006. Remains in rehab.

First Baptist Church, Atlanta, Georgia, church of 5,000

<http://www.fba.org>

Address: 4400 North Peachtree N, Atlanta, GA 30338

Phone: 770.234.8300

Charles Stanley, senior pastor (looking for a successor)

First Baptist Church, Dallas, Texas, church of 3,000 in attendance (about half of that since W.A. Criswell retired)

<http://www.firstdallas.org/index.dfm?FuseAction=page&PageID=70>

Address: 1707 San Jacinto, Dallas, TX 75201

Phone: 214.969.0111

Vacancy in senior pastor position

Grace Baptist Church, church of 2,000

Address: 22833 Copper Hill Drive, Santa Clarita, CA 91350

Tom Givens, Senior Pastor 1984-2006

Current search going on

Menlo Park Presbyterian Church, Menlo Park, California, church of 3,500

http://www.mppcfamily.org/w_page.php?id=9&type=section

Address: 950 Santa Cruz Avenue, Menlo Park, CA 94025

Phone: 650.323.8600

Rick Langeloh, acting executive pastor since 1983

John Ortberg, teaching pastor since fall of 2003

Vacancy in senior pastor position

Oak Hills

<http://www.oakhillschurchsa.org/>

San Antonio

Max Lucado, March 5, 2007 announced he is stepping down but will remain.

Overlake Christian Church

Overlake Christian Church, Redmond, Washington, church of 3,500

<http://www.occ.org/about/familycircle.asp>

Address: 9900 Willows Road NE, Redmond, WA 98052

Phone: 425.702.0303

Bob Moorhead, senior pastor 1970-1998, resigned May 1998 amid allegations of inappropriate touching of several young men in the 1970s

Rick Kingham, senior pastor since November 19, 1998, resigns February 13, 2007

University Presbyterian Church 4,500 members

<http://www.upc.org/>

Address: 4540 Fifteenth Ave. NE, Seattle, WA 98105

Phone: 206.524.7300

Earl Palmer, Senior Pastor 1991-present, announced retirement November 2006

Woodland Park Baptist Church

Address: 7501 Standifer Gap Road, Chattanooga, TN 37421

Phone: 423.899.9185

John Meador, pastor 1999-2006 went to First Baptist Church, Euless, Texas
Church still in search

Xenos Christian Fellowship, Columbus, Ohio, church of 4,500

<http://www.xenos.org/>

Address: 1340 Community Park Drive, Columbus, OH 43229

Phone: 614.823.6500

In 10-year succession process for founding pastor
Dennis McCallum, Gary DeLashmutt – lead pastors

Tier Five: Other Churches

Bay Life Church, Brandon, Florida, church of 1,500-2,000

<http://www.baylifeweb.org/home.asp>

Address: 1017 Kingsway Road, Brandon, FL 33510

Phone: 813.661.3696

Daniel Stahl, senior pastor 1980-2003; resigned with marriage issues/infidelity
Mark Saunders, senior pastor since fall 2004

Calvary Bible Church, church of 1,500

www.calvarybible.org

Address: 855 South Drake Road, Kalamazoo, MI 49009

Phone: 269.372.2581

John Munro, senior pastor resigned January 5, 2006, after 10 years of ministry to
become Senior Pastor of Calvary Church in Charlotte, North Carolina
Currently searching

Covenant Presbyterian Church, Ft. Myers, Florida, 1,200 (membership of 1,600)

<http://www.covpcfm.com/>

Address: 2439 McGregor Blvd., Ft. Myers, FL 33901

Phone: 239.334.8937

Dr. David Swanson, senior pastor April 1999-August 2004; went to First Presbyterian
Church in Orlando

Dr. Bill Stephens, senior pastor since October 2005

Christ United Methodist Church, Chattanooga, Tennessee, membership of 3,400;
worship attendance of 1500

<http://www.christplace.org/m/index.php>

Address: 8645 E Brainerd Road, Chattanooga, TN 37421

Phone: 423.892.9363

Dennis Newman, senior pastor 1996-January 15, 2006; resigned for moral reasons

Mark Flynn, senior pastor since July 2006

Crystal Cathedral, Garden Grove, California, church of 1,500

<http://www.crystalcathedral.org>

Address: 12141 Lewis Street, Garden Grove, CA 92840

Phone: 714.971.4000

Robert H. Schuller, senior pastor 1955-2005, founder and

Robert A. Schuller, senior pastor since January 22, 2006; on staff since 1980. Son of founder of the church

Fellowship Bible Church, Dallas, Texas, church of 1,500-2,000

<http://www.fellowshipdallas.org>

Address: 9330 N Central Expressway, Dallas, TX 75231

Phone: 214.739.3881

Bill Counts, senior pastor 1980-January 2005; retired

Gary Brandenburg, senior pastor since October 2005

First Baptist, Roanoke, Virginia, church of 1,600-1,800 (membership of 4,000)

<http://www.firstroanoke.com/HTML/index.asp>

Address: 515 Third Street, PO Box 2789, Roanoke, VA 24001

Phone: 540.224.3300

James Austin, senior pastor March 2001-September 30, 2005; moved to another church

Dr. Brian Smith, senior pastor to begin September 1, 2006

National Presbyterian Church, District of Columbia, 2,500 members

<http://www.natpresch.org>

Address: 4101 Nebraska Avenue NW, Washington, DC 20016

Phone: 202.537.0800

Craig Barnes, senior pastor 1993-2002; resigned to write and teach at Pittsburgh Theological Seminary

Dr. Thomas A Erickson, interim senior pastor August 2002-August 2004

Dr. Gareth Icenogle, senior pastor since August 2004

Northwest Bible Church, Dallas, Texas, church of 1,400-1,600

<http://www.nbctexas.org>

Address: 8505 Douglas Avenue, Dallas, TX 75225

Phone: 214.368.6436

Howard Clark, former senior pastor, left in 1998

Neil Tomba, current senior pastor; senior pastor since February 2001

Peachtree Presbyterian Church, Atlanta, Georgia, church of 2,000 (membership 10,000)

<http://www.peachtreepres.org/web/>

Address: 3434 Roswell Road NW, Atlanta, GA 30305

Phone: 404.842.5800

Frank Harrington, former senior pastor; senior pastor for 28 years; died in 1999

Victor Pentz, senior pastor since August 2000

Santa Cruz Bible Church, Santa Cruz, California, was church of 2,500; now church of 1,300

<http://www.santacruz bible.org/contact.html>

Address: 440 Frederick Street, Santa Cruz, CA 95062-2606

Phone: 831.429.1162

Chip Ingram, former senior pastor and currently president of Walk Thru the Bible; served for 12 years; left in July 2002

Dean Bouzeos, teaching pastor since 2005; now have team structure

Saxe Gotha Presbyterian Church, Lexington, South Carolina, church of 1,000

<http://www.saxegotha.org/holmes/>

Address: 5503 Sunset Blvd., Lexington, SC 29072

Phone: 803.359.7770

Robert McBride, senior pastor 1982-2004, resigned July 2004 for “violating his ordination vows and his own Christian conscience”

Dr. Leslie Holmes, senior pastor since September 2004

Second Presbyterian Church, Indianapolis, Indiana, church of 1,500-1,800

<http://www.secondchurch.org/>

Address: 7700 N Meridian Street, Indianapolis, IN 46260

Phone: 317.253.6461

Dr. William Enright, senior pastor 1981-June 2004; retired

Lewis Galloway, senior pastor since April 2004

APPENDIX C

INFORMATIONAL LETTER FOR INVITATION TO PARTICIPATE IN THE RESEARCH

May 20, 2007

Dear _____

It was nice speaking with you this past week. As I shared with you, I have been the senior pastor of Calvary Church in the greater Philadelphia area for the past 18 years. I am currently in dissertation stage of my Ph.D. program at Temple University in Philadelphia. I contacted you to invite you to participate in the research study: "The Senior Leader Succession Process in Megachurches."

Succession fundamentally is about change and few changes have greater impact on churches than the change of the senior leader of an organization. Although many senior leaders build teams and seek to keep a church from being "person focused," by virtue of a senior leader's visibility, influence and authority, it is not unusual for the transition of a senior leader to trigger other dramatic changes. Churches do not have a great track record for navigating senior leader changes.

The Hartford Institute of Religion and the Leadership Network conducted a national survey of megachurches in 2005. The study identified over 1,200 of these churches with 2,000 or more attendees in their worship services each week. This is almost double the number of churches identified in the year 2000. Eighty-three percent of the churches identified in the 2005 study reported that their most dramatic growth occurred during the tenure of the current senior pastor. The average age of the senior pastor is 52 years old and the median tenure is 13 years. This means that there will be a tremendous number of senior leader transitions in the next two decades.

Few of us doubt the important of exceptional senior leadership to long-term church health but remarkably few churches have developed a succession plan. Beyond that there are few resources available to large ministries. Although there are a handful of more popularly written books, both in the profit and nonprofit worlds, there are few studies that have been conducted that actually get the opinions and observations of those who lived through the succession process. I am not aware of any such studies in large ministries.

My invitation is for you to be one of three churches to participate in this study. Each of these churches has recently been through a senior leader transition. The churches range in size from 2,000 to more than 20,000 adults in weekly attendance. The study will provide a great opportunity for your own personal learning and for assisting other churches that are entering or will soon enter the leader succession process.

Understanding the number of demands that senior leaders experience, I have designed **the requirements** for participation to be minimal. The requirements are as follows:

- Confidential individual interviews will be conducted with the predecessor, the current senior leader, a senior level staff member and a member of the governing board. There may be brief follow up contact to clarify any information shared.
- Access to approved internal and external communication (letters, messages, emails, prospectuses, annual reports, audio recordings, video recordings, etc.) that may provide additional insights into the succession process.

I anticipate that the study will be conducted between July 2007 and September 2007. I will pick dates convenient to you and will plan to conduct the interviews in person.

If you agree to participate, I will provide additional information.

Thanks in advance for your openness to this request.

Meredith Wheeler
Senior Pastor, Calvary Church
Contact Information