



UNITED METHODISTS
OF UPPER NEW YORK

®

**PASTORAL TRANSITION PROCESS
GUIDEBOOK FOR CONGREGATIONS**

Updated February, 2024



Our Mission

Make disciples of Jesus Christ for the transformation of the world.

Our Vision

Live the Gospel of Jesus Christ and be God's love with our neighbors in all places.

A Disciple is a person who:

- Confesses Jesus Christ as Savior and Lord
- Is continually seeking to be transformed by the Holy Spirit
- Seeks accountability to grow spiritually and in witness and ministry.
- Boldly engages the world by dismantling all forms of oppression and building up marginalized people and communities.
- Participates with God in making other disciples.

A Christ Following Transformation Leader is a disciple who leads transformation by:

- Fostering a culture for people to be open to the work of the Holy Spirit
- Understanding the gifts and needs of their ministry setting.
- Creating a healthy and sustainable disciple-making culture and system
- Discovering, developing, and deploying servant leaders for mission in the community
- Empowering a system of accountability to the mission

A Missional Congregation is a Spirit-filled and forward-leaning community of disciples that continuously is:

- Inwardly transformed and outwardly focused
- Welcoming all people
- Developing disciples who make other disciples.
- Serving the community through life-changing mercy and justice ministries
- Sharing powerful stories of impact and transformation
- Growing and displaying measurable fruitfulness over time

Markers of a Missional Congregation

- Inviting and inspiring worship
- New and growing disciples.
- Active Discipleship Groups
- Disciples engaged in hands-on mission.
- Generous giving

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Pastoral Transition Process for Congregations

Introduction

One of the most significant times in the life of a congregation is during a change of pastors. It is a period, which produces considerable anxiety, confusion, ambiguity, and uncertainty about the future, as well as openness to change and new life in the congregation.

During this transition period, persons grieve for the pastor who is leaving and have a sense of anticipation for developing relationships with an incoming pastor and family. New leadership often emerges in the congregation while others at the same time feel cut off. If managed well, it can become a time for growth in the congregation. If managed poorly, it can negatively impact your future relationship with your pastor.

Transitions will include less than full-time pastoral leaders. The District Superintendent will provide direction to support the pastor and congregation during a transition of a less than full-time appointment.

It is the expectation of the UNY Cabinet that all congregations experiencing a change of pastors participate in a Pastoral Transition Process to:

- Understand the matters involved in a pastoral transition.
- Provide a positive, graceful process for the departing pastor.
- Prepare to receive the incoming pastor with enthusiasm.
- Utilize this period of openness to expand their vision for their future.
- Develop an understanding of the issues that the new laity/ clergy team needs to address

Developing a Transition Team

Each S/PPR Committee is expected to help the congregation to form a Transition Team, after the announcement of a change of pastor is made. The Transition Team will be responsible for leading the transition process. It will be their responsibility to plan for and manage the transition related to issues being faced by the congregation. It may include persons from the trustees, program ministries, worship, SPRC persons as well as others who have good insight into the nature of the congregation, whether they have a current leadership role. The team will include the incoming pastor. The departing pastor will be a consultant to the committee.

The team should include 4 to 6 persons. If there is more than one church on the charge, you may want to consider 4 – 6 persons from each church. The size of the team will be adjusted in accordance with the size of the congregation. The Transition Team will provide leadership to assist the pastor and congregation through the transition period.

Transition teams will meet in a format that promotes an L3 culture. In the L3 culture, teams **Love**, **Learn**, and **Lead** together. **Loving** is about loving God, ongoing spiritual formation, as well as loving each other through care and accountability. **Learning** provides opportunities to enhance the skills and understandings needed to move the congregation more deeply into disciple-making. **Leading** moves from team-only conversations to concrete action steps towards accomplishing the goals of the team and congregation. Meeting in the L3 culture provides optimal conditions for the development of environments that foster transformation.

The team will serve from the time of their formation to the conclusion of the first year's review. During this time, the transition team will meet regularly with the pastor to increase the fruitfulness of the transition beyond the first three months.

Essential Next Steps

Pastors and congregations are expected to start the transition process immediately after the new appointment is announced to the congregation(s).

Your essential next steps include,

- Create and convene a transition team that includes the departing and incoming pastor.
- Review the Appointment Covenant shared with the incoming pastor associated with the change of pastor.
- Departing and incoming pastors set dates for one-on-one transition conversations.
- Transition team and departing pastor collaborate to complete the Pastoral Transition Audit and compile information for the Info Pack.
- Transition team collaborates with the departing and incoming pastors and the local church trustees to prepare for the move.
- Transition team collaborates with the departing pastor to organize a farewell celebration.
- Departing pastor secures pulpit supply and pastoral care as needed for the last two weeks in June.
- Transition team collaborates with the incoming pastor to set dates and times for installation service (if appropriate) and "know our pastor" small group

Initial Steps in the Transition

1. **Consultation Process with the S/PPRC:** The transition began last fall when your church submitted its Church Profile/Church Advisory for Appointment Making. The profile should be updated every year. This process continues as the SPRC communicates and connects with the District Superintendent if a meeting is requested. This process may include an opportunity for the congregation to provide feedback to the SPRC.

Appointment Consultation Meeting

During the consultation meeting,

- Church profile is reviewed and updated as needed
- Appointment level is clarified (full-time, part-time, etc.)
- Missional pastoral leadership needs are identified
- Measurable benchmarks are discussed, as appropriate.
- Salary, expense account, vacation, and all compensation issues are clarified
- Parsonage issues are discussed, and preliminary plans are made for any needed actions
- DS reviews the next steps in the appointment process with the SPRC team
- DS encourages the SPRC team to continue serving as ambassadors of unity and hope during the transition.

2. **Appointment Transition Process** The DS contacts the SPRC Chair of the outgoing pastor's church and arranges an SPRC team meeting.

- a. Transition out meeting (in person or via phone/video conference)
 - DS informs the SPRC team that the congregation will experience a change in pastoral leadership with a high-level rationale (i.e., retirement, the pastor has received a new appointment, etc.)
 - Outgoing pastor is allowed to address the SPRC team
 - SPRC team is allowed to address the outgoing pastor and DS
 - DS and SPRC agree on a timeline for announcing the anticipated change in pastoral leadership
 - DS discuss the appointment process and timeline with the SPRC team
 - DS and SPRC discern whether to initiate the new appointment consultation or schedule it later.
 - DS encourages the SPRC team to serve as ambassadors of unity and hope during the transition months
 - Confidentiality reminder

3. **Appointment Introduction Process**

- Current DS calls the pastor to inform him/her that he/she will receive a call regarding a potential new missional appointment.
- Intake DS calls the pastor to share information about the new missional appointment.
- Intake DS prays with the pastor at the end of the conversation a remind the pastor of the importance of confidentiality.
- Intake DS sends an email to the pastor with the appointment memo, church profile, and Mission Insite Executive Report.

4. **Appointment Introduction Meeting with SPRC.**

- a. Intake DS sets up an introductory meeting in person or via phone/video conference.
- b. In-Person meeting

- Meal with pastor and spouse (if possible), optional
- Parsonage Tour, if applicable and appropriate
- Meeting with the SPRC committee
 - Intake DS shares the discernment of the cabinet regarding a new pastor (without the pastor in the room)
 - Intake DS answers any questions the SPRC might have.
 - Pastor is brought to the room and introduced to the SPRC team
 - Pastor briefly shares faith journey and other personal information. Spouses might share as comfortable.
 - DS facilitates Q&A between the pastor and SPRC committee.
 - Q&A, Concerns with the DS (without the pastor in the room)
 - Finalize appointment and share appropriate documents.
 - Adjourn the meeting. The pastor is welcome to stay with the committee to continue conversations and/or tour the church building(s).
- Zoom Video Meeting
 - Intake DS shares the discernment of the cabinet regarding a new pastor (with the pastor in the virtual waiting room)
 - Intake DS answers any questions the SPRC might have.
 - Pastor is brought to the Zoom room and introduced to the SPRC team (spouses can join the conversation as comfortable).
 - Pastor briefly shares faith journey and other personal information. Spouses may share as comfortable.
 - DS facilitates Q&A between the pastor and SPRC committee.
 - Q&A, Concerns with the DS (with the pastor in the waiting room)
 - Finalize the appointment and mention that appropriate documents will be emailed to the SPRC chair.

Key Aspects of the Transition

5. **Pastoral Transition Workshop for the Team (Video or in-Person)**

This workshop will introduce the team and incoming pastor to phases of a pastoral transition, assist the team to develop an appropriate strategy, introduce resources that can be used to implement that strategy, and begin to develop benchmarks, a time line, responsibilities and an evaluation process. The transition provides an opportunity to examine the Intentional Discipleship Process of the congregation, as well as an opportunity to explore how the congregation is helping to discover, develop, and deploy Christ following transformational leaders. Workshop time will model an L3 culture as well as teach the principles and processes of living into an L3 culture.

6. **Transition Planning**

During the spring, the transition team will continue to develop and work their plan for the transition. It will include planning for helping the departing pastor to exit as well as entry and startup planning for the incoming pastor. Congregations wishing assistance during this process may request it by reaching out to the District Superintendent.

7. **Cross Cultural Appointments**

In settings where the transition includes a cross-cultural appointment, a coach for cross-cultural ministry will be assigned. The coach will work with both the transition team, and the incoming pastor to prepare for the aspects of a cross-cultural appointment. Coaching will begin at least one month prior to the beginning of the appointment, and continue for the duration of the work of the Transition Team.

8. **Specialized Transitions**

After a long-time pastorate, or when there has been a crisis in the congregation, a specially trained coach will be assigned to work with the transition team and the incoming pastor. The District Superintendent in consultation with the UNY Cabinet will determine the need for specialized coaching.

9. **Exit Interview with Departing Pastor**

This interview should take place during the latter half of May. It is an opportunity to express the sense of loss being felt by the pastor and the congregation, identify issues and concerns that still need to be addressed, enable the departing pastor to share information about members of the congregation that should to be passed on. The results of this interview should be shared with the incoming pastor.

10. **Preparation for Entry / Startup with Incoming Pastor**

It is recommended that the team meet with the incoming pastor in the spring. This is a time to share transition plans that involve the incoming pastor, begin a team building process, identify the congregation's priorities for pastoral leadership during the early months, introduce a ministry planning and review process for assessing ongoing needs and leadership roles. Establish benchmarks for ministry and a time-line for reaching them. A variety of startup options for use by the team will be shared during the training.

11. **Upgrading Pastoral Leadership Skills**

The SPRC, Incoming Pastor and DS consult regarding needed training that will enhance the incoming pastor's skills, in order to empower him/her to achieve benchmarks of ministry that have been established. A plan to develop clergy excellence will be formulated. This may include a Mentoring for Effectiveness covenant as shared with the transition team and the SPRC of the congregation. Additionally, this is an

opportunity to ensure the pastoral leader has the skills needed to lead the congregation in implementing an Intentional Discipleship Plan.

12. Upgrading Congregational Skills

The SPRC, Incoming Pastor and DS consult regarding needed training that will enhance the congregation's skills in order to achieve the benchmarks of ministry that have been established. Recommendations regarding utilization of conference resources to strengthen congregational ministry are usually included in the appointment memo or discussed with the S/PPRC. During the transition, the team will have an opportunity to evaluate the Intentional Discipleship Plan for the congregation. In congregation where there is not an existing plan, preparation for creation and implementation of the plan will be a significant part of the transition team's work.

13. Stages of Spirituality Assessment

Transition provides the congregation with a time to evaluate the depth of Spirituality found in the life of the congregation. Further, it is a time for a pastor to check in on their stage of spirituality as well. By the congregation and pastor understanding the stage of spirituality allows the transition team and pastor to navigate similarities and differences well.

14. Three Month / six month / nine month / one-year check-in and beyond

An opportunity is provided for evaluation, to focus on a feedback process that assesses the accomplishments of the benchmarks in relation to established timelines. The evaluation is based on an assessment regarding meeting the expectations stated in the Appointment Memo. The evaluation identifies current issues that should be addressed by the lay and clergy leadership. These evaluations will be done at 3, 6, 9, 12, 15, 18 months. See page 25 for the report.

Each church will be asked to do an annual appraisal due at the time of the church conference reports. The results of that self-assessment will help the church and pastor to evaluate the progress they are making.

12. Covenant for Ministry

A Covenant is a guiding document sharing the commitment of the pastor and the congregation in their efforts to be a highly vital congregation that is making disciples of Jesus Christ for the transformation of the world. The covenant is renewed annually, visited each meeting of the SPRC to ensure the pastor and congregation are remaining true to the covenant. Congregations in transition are asked to have their covenant renewed no later than September 1 of the year the transition takes place. Renewal of the covenant will happen each July when not in a year of transition.

Three Stages in Engaging Transition

1. **Exiting with Excellence**

- Saying Goodbye and Coming to Closure
- Providing for Pastoral Leadership Change
- Returning to a Previous Appointment
- Steps to Exiting with Excellence

2. **Entering with Energy**

- Arrival of incoming pastor
- Physical move
- Psychological move
- Becoming part of the church

3. **Engaging with Enthusiasm**

- Learning the system
- Understanding roles
- Mutual Testing - Working to develop trust
- Mutual Acceptance - Crossing the inclusion barrier
- Job/Role Planning - A ministry of partnership begins at this point

Exiting with Excellence (for Departing Pastors)

By this time, departing pastors have done almost all the effective ministry they could hope to do in a specific appointment. Exiting with excellence means leaving the church to the congregation and the next pastor.

Some of the things that help a departing pastor exiting with excellence, include,

- Exhibiting hospitality and a welcoming spirit in receiving your successor
- Gathering all the materials needed for an incoming pastor's entry into the church (INFO-PAK, *see Resources*)
- Take the initiative to set up the transition meetings
- Helping to introduce the incoming pastor to key leaders in the church
- Working out move dates and other calendar issues cooperatively
- Sharing knowledge regarding the congregation and the community
- Uplifting the positive aspects of the pastoral change
- Leading in prayer for the incoming pastor

Saying Goodbye and Coming to Closure

The relationship between pastors and congregations is unique. Pastors are with individuals in their moments of greatest joy, deepest sorrow, greatest victories and most tragic challenges. They are there in moments of birth, baptism, confirmation, marriage, and death. Pastors provide spiritual counsel, prophetic insights, comfort, chastisement, a discerning spirit, correction, humor, and challenge, all in a context of Christian fellowship.

Naturally, laity and pastors find it hard to risk forming new relationships – even with their incoming pastor. Having said these things, it is true that there can only be one shepherd of any flock. A pastor needs to have the

opportunity to lead in order to make a positive impact on a congregation. Each pastor has his/her own gifts and graces to share. Each will add something to the ministry of the congregation. There is a great challenge to “let go” and “go on” but such conduct is important if we are to continue healthy ministry in the years ahead.

The simplest, yet many times the most profound goal in the transition is to bid a hearty and heart-felt thank you and farewell to your current pastor, while preparing an equally sincere welcome and hospitable invitation to your incoming pastor. Someone once observed, “Those who can say ‘farewell’ in a spirit of love are often those who know how to say ‘welcome’ in a spirit of faith and hope.

Providing for Pastoral Leadership Change

Ways that strengthen the local church and provide an open and accepting climate:

- Prepare to disengage and let go
- Acknowledge and work through grief
- Prepare for a successor
- Help successor enter (with a minimum of surprises)
- Help the church prepare for an incoming pastor
- Exit Interview
- Celebrate the continuity of the church and its ministry

Idea Mart On her last Sunday with her congregation, a Pastor took off a stole and placed it on the altar. She asked that the stole be presented to the incoming Pastor on his/her first day, as a symbol of the church’s continuing ministry in the connectional fellowship. This is to be done in accordance with UNY Conference guidelines for vestments.

Returning to a Previous Appointment

- As of the effective date of a new appointment, a pastor shall immediately cease all pastoral counseling and pastoral visitation with members or member families in the previous appointment. Since appointments are generally announced at least several weeks in advance, each pastor has adequate time to affect closure and make the appropriate referrals for the pastoral care of members.
- Pastors shall have a clear understanding with former congregations that they will not return to officiate at baptisms, weddings, and funerals or do pastoral counseling or pastoral visitation in that parish. Active or retired Pastors shall respectfully decline to participate in such duties when invited by members of a former congregation. Declining all such invitations is the responsibility of the previous pastor.
- The previous pastor must consult the District Superintendent before returning for pastoral functions. Such visits to former churches shall require the advance approval of the District Superintendent. The present pastor should never be pressured to invite a previous pastor. Pressure to involve the previous pastors should not be generated by either the congregation or the previous pastor.
- Several weeks prior to concluding a pastoral appointment, a pastor shall inform all members of the church of this policy by printing sections 1, 2 and 3 verbatim in either a pastoral letter that is to be sent to each member, or a church newsletter which can be mailed or emailed to the congregation.

Steps to Exiting with Excellence (Current Pastor)

Overview

- **Exit Interview (Led by Transition Team)**
- **Parsonage Issues**
- **Coming to Closure** – How do we help the pastor to say goodbye?
- **Administrative Matters** – All issues are open for discussion
- **Pastoral Care / Status of Congregation**
- **Results of Any Recent Self-Assessment Programs**
- **Moving Plan for Current Pastor**
- **SPRC Responsibilities** – Should communicate boundaries regarding current pastor

Exit Interview

An exit interview with the current pastor is an important part of the leave taking process, of letting go and saying goodbye. It is an opportunity to reflect in a non-judgmental way on the nature of the relationship between the pastor and the congregation. It enables the sharing of information and making plans for the current pastor's exit and the entry of the incoming pastor. It provides both the pastor and the congregation with an opportunity to learn from this relationship in order to improve on the new relationship each is about to enter.

Who participates in the exit interview?

Participants should include the pastor, the SPRC, and a few key leaders of the congregation. It is not a congregation-wide event. In the case of an associate pastor, it is recommended that a second exit conversation happen with the senior pastor.

When should the interview take place?

This is best done before the pressures of the move. Three to five weeks prior to the move would be ideal.

What should the setting be?

The gathering should be in a comfortable setting. Participants may want to have access to newsprint for recording discussion.

What is the format for the exit interview?

The exit interview can be led by a member of the congregation. However, it is advisable to have an outside person as leader if there is tension relating to the departure of the pastor. Please ask your DS for assistance if this is the case. The conversation should be non-judgmental, free of blame and accusations. It is a time for reflection, sharing the good experiences and letting go of the problems.

The agenda might include:

- Reasons behind the decision to move: personal, church, structural
- Pastor is asked to reflect on the state of the congregation
- Strengths
- Where it is now
- What are the unfinished agendas
- What have been the leadership expectations and how have they been articulated? Were they reasonable?
- Of the pastor

- Of the laity
- What have been the assumptions about the vision and mission for the congregation? Have they been shared by pastor and laity?
- What needs to be done during the transition?
 - What information needs to be gathered?
 - What should be made available to the incoming pastor?
 - Parsonage issues?
 - Office issues?
 - How do we care for things during the transition?
 - Calendar concerns?
- What will be the nature of our relationship in the future?
- What will each person take with him/her from this relationship?
- What is the best way for us to come to closure?
- Are there people who need to be cared for in order for them to get beyond feelings of loss or anger?

Parsonage Issues

Review with the pastor and the family the needs of the parsonage.

Coming to Closure – How do we help the pastor say goodbye?

- Identifying who needs personal contact
- Coming to closure with key groups
- Mend fences – let go of differences that might have caused undue friction
- Communicate the new role of the current pastor to that pastor and the congregation
- Uplift the positive aspects of the pastoral change
- Begin to pray for the current and incoming pastor and their families

Grace-filled Send-off

Congregations can help the transition by doing a good job of bidding farewell to the pastor as he/she moves on. A few things that can be done are:

- Provide appropriate appreciation for the ministry of your current pastor
- Provide a festive atmosphere for a farewell celebration

Administrative Matters – All issues are open for discussion.

SPRC may want to help current pastor with these tasks:

- Review of membership lists
- Review of ongoing agendas
- Making summaries of status of boards and committees
- Preparing a notebook containing minutes of meetings for the past year
- Updating calendar for the church
- Cleaning out the files

Pastoral Care / Status of Congregation

Assist the current pastor in preparing notes for pastoral care needs

- Counseling
- Life transitions
- People who need to be looked after

Results of Any Recent Self-Assessments & Preparation of the Transition Audit

SPRC Responsibilities

- Communicate clearly to the congregation the new role of the current pastor
- Emphasize the importance of keeping boundaries

Exercise

Table discussion with Transition Team and Current Pastor

What will your team do to prepare for an effective transition?

What church issues need to be followed closely during the transition?

Are there parsonage issues to be addressed prior to the incoming pastor's arrival?

Are there church office or pastor's office issues that need to be addressed?

Who will take charge of assembling the information?

What help is needed to assemble the information?

Thoughts on Entering with Energy (Incoming Pastor)

Entering with Energy

Begin a new ministry in ways which will ensure the development of quality performance, work satisfaction, and a clear sense of identity of both the pastor and the church.

- As soon as appointment is announced, start the relationship with your new church by sending a letter introducing yourself and your family
- Appreciate a typical transition experience
- Define an ideal transition
- Analyze the actual transition
- Communicate realistic expectations, including benchmarks and timelines
- Develop personal relationships with key leaders and groups

Entering with Energy (Incoming Pastor)

Overview

- Preparing for incoming Pastor
- Planning for the Move In
- Welcome
- Introductions to Congregation
- Introductions to Community
- Team Building Process

Preparing for Incoming Pastor

- Share results of any recent church self-assessment
- Clarify leadership expectations and priorities
- Identify critical agenda items for the first few months and for the first year
- Communications with incoming pastor and family
- Letters to pastor, to family
 - Email
 - Newsletters
 - Newspapers
 - Parsonage layout, parsonage furnishings
 - Worship bulletins
- Develop an active transition plan - Invite incoming pastor to meet with transition team

Planning for the Move In

- Date, means, time frame
- Parsonage ready
 - Parsonage manual – how things work, who to contact, basic understandings
 - Welcoming, greetings, showing hospitality

Welcome

- Plan worship for first Sunday
 - Incoming Pastor and his/her family are introduced

- Incoming Pastor is freed from leading worship on first Sunday
- Incoming Pastor should be part of the planning of this service, i.e., who will preach, issues around communion, etc.
- Welcome reception

Orientation to Church, Office and Church Records

- Church tour
 - How things work
 - Where things are
 - Who to contact
 - Basic understandings
- Giving out keys, reviewing codes, passwords, etc.
- Learning about the building, equipment and computer systems

Introductions to Congregation

- Plan one to one meetings with key leaders
- Introduce the pastor to those in need of pastoral care
- Plan small group gatherings to begin during the summer – This is a time to tell stories, share faith journeys, sing and worship together. If possible, hold them in homes (or parsonage if others prepare the refreshments – the church is only used if necessary.) Keep the groups intimate – no more than 10 - 18. Schedule times so that people can have choices. Some could be during the day for those who do not like to go out at night.
- Make a map of the parish with notations of where people live, or list with addresses (No PO Boxes)
- Update the church directory – If there is no directory, consider snapshots of members
- Wear nametags during worship
- Volunteer to accompany the incoming pastor on initial visitations
- Develop a team building process with leadership team
 - Orientation to agendas
 - Sharing of calendar
 - Team building event
 - Work on forms
 - Contact key leadership roles and expectations
 - Set benchmarks – Work on 3/6/9/12 month priorities list
- Share current and ongoing pastoral care/needs of the congregation

Introductions to Community

- Provide information on basic community resources
 - Identify potential doctors, dentists, etc.
 - List of baby-sitters (if appropriate)
 - Shopping hints
 - Places to eat
- Plan for introducing pastor to other area pastors including a list of surrounding churches
- Plan for introducing pastor to community leaders including a list of key leaders with contact information
- Introduction to school personnel (if appropriate)

- Introduction to hospitals and nursing homes

Team Building Process

- Plan monthly SPRC meetings
 - Feedback and continuous evaluation are important
 - Role negotiation
 - Goal setting for ministry objectives, with review of benchmarks and timelines
- September Congregation Gathering to tell church's story (History Sharing Experience).
Plan a time when you can have a meal and about three hours to work together. Provide childcare for the youngest after the meal. Work together on the history of the congregation. Invite someone outside the congregation to be the facilitator so that the pastor and laity can be full participants. Refer to worksheet on 'A History Sharing Experience' (see Page 31)

Thoughts on Engaging with Enthusiasm

Engaging with Enthusiasm

Help the incoming pastor to locate his/her place in the church and clarify initial issues needing attention.

- Select an appropriate and compatible management style among a range of options
- Define initial responsibilities
- Select management procedures
- Identify major issues
- Make the transition from the former pastor
- Allow time for input

Mutual Testing - Learn to work effectively in the incoming pastoral relationship.

- Mastering job basics in the new situation
- Building mutually supportive relationships
- Building a new frame of reference
- Mapping the players and the networks
- Locating ourselves in the networks
- Learning the vernacular
- Accessing organizational functioning

Mutual Acceptance – Pastor and congregation will move toward the realization of shared ministry and common life.

- Crossing the inclusion boundary
- Crossing the authority boundary
- Accepting the congregation, quirks and all – Accepting the pastor quirks and all
- Negotiate, evaluate, and re-negotiate mutual expectations
- Dealing with resistance

Job/Role Planning - Develop the local church as a vital and effective instrument of ministry and mission.

- Building a common vision of a desired future for this local church
- Clarifying work responsibilities
- Selecting the key result areas, including benchmarks and timelines
- Clarifying priorities

- Establishing renewed Covenant in conjunction with SPRC
- Building a plan of operation
- Providing for strategic planning
- Building support systems around innovators

Engaging with Enthusiasm in a New Ministry

Identifying, Understanding and Clarifying Expectations

What is an expectation? A strong belief that something will happen

One to one meetings

Pastors hold one to one meetings with key leaders (elected leaders and perceived leaders) to:

- Establish healthy relationships – I would like to know more about you. Tell me about yourself. What are you most passionate about in life? What uniqueness do you bring to the ministry of the congregation? What do you need to serve well in leadership?
- Understanding the congregation – What are the gifts and strengths of the congregation? What do people appreciate about the congregation? What are your hopes for the congregation? Do you have any concerns about the congregation? Where would you like to see the congregation in five years?
- Understanding expectations – What do I need to understand to serve well in the congregation? What are 3-5 things you would like to see me do in the first year of my ministry with the congregation?

Small group house meetings

An opportunity to get to know a broad segment of the congregation in an informal setting. These gatherings are usually held in a church member's home with 10-18 people gathered. Begin by going around the circle and asking each person to introduce himself or herself to you by sharing their name, how long they have been associated with the congregation, and what is one thing they appreciate about the congregation. Then ask the full group the following:

- Share a hope you have for the congregation?
- Share one concern you have?
- What is the next important step we should take to fulfill our mission?
- What are your expectations for our ministry together?
- What questions do you have for me?

Identify your first six-month goals and share them with the staff parish relations committee and the superintendent and invite their feedback.

Identify your next year goals, following your one to one and small group meetings, and share them with the staff parish relations committee and the superintendent.

Periodic Check-ins – During the first year, the pastor and the staff parish relations committee are to meet quarterly to:

- Provide updates on ministry
- Identify what is going well and why
- Identify challenges and how the challenges are being addressed
- Clarify and establish reasonable expectations

Quarterly the pastor and Staff Parish Relations Chairperson are to each complete a Quarterly Check-In Report update and email it to the district superintendent. (Quarterly Check-In Report, *see resources*)

Exercise

Table discussion with Church and Incoming Pastor

Who are the key elected leaders and perceived leaders with which the pastor should meet?

How many one to one meetings are appropriate for your church?

Who will arrange for the small group house meetings?

How many house meetings are appropriate for a congregation your size?

Culture as a Gift for Ministry

Culture is a learned set of beliefs, practices, values, and norms that emerge from the material, loved experience of groups of people and their ancestors. Culture interprets the world and determines worldview, relational patterns, neural-emotional responses, ways of conceiving the self and others, communication and the like. Culture is like a pair of glasses that interprets what we see, but I cannot be taken off or put on from one day to the next. It is an intergenerational and fundamental care of identity that usually operates beneath the level of conscious awareness.

G. Derrick Hodge, *Learning from Strangers*, p. 4

Many appointments will bring together a pastor and congregation who have different lived experiences. These differences can be viewed as barriers to effective building of relationships, or they can be a gift, reflecting the diversity of God's reign where we embrace our different backgrounds and experiences, learn from one another, and appreciate this diversity as a gift rather than an obstacle. Age, economic status, race, gender, family of origin, and educational background are just a few of the varied influences that are at play in defining our cultural background, and everyone has a framework out of which we view the world.

From the very beginning of a new appointment, recognizing this reality is an important step in fostering effective communication and understanding. Conversation in the Staff-Parish Relations Committee, with key leaders in the church, and within small groups and other gatherings are crucial touch-points for helping pastors learn about the varied cultures at play within a congregation and church members to begin to understand the culture from which the pastor is coming.

Some of the benefits and joys of this diversity of culture are:

- ❖ *Congregations are exposed to new experiences of God that emerge from different lived experiences.*
- ❖ *Congregations may become more relevant in their neighborhood, reaching new communities of people*
- ❖ *Clergypersons are stretched to learn new skills related to communication, diplomacy, self-care, and openness.*
- ❖ *The congregation can become more energized and creative by the arrival of a different pastor that brings it out of its rut.*

Adapted from *Learning from Strangers*, p. 8

The responsibility for facilitating the ministry of the church is a shared responsibility of pastor and laity. Therefore, there is equal responsibility for recognizing that conversation about different cultural backgrounds

and the expectations that these bring is paramount for a smooth transition and start up. Various exercises can be done to facilitate these conversations and a new way of thinking such as the Iceberg Exercise and the Cultural Identify exercise. What each of these does is to help persons realize that we all have a cultural background that is a gift from God and better reflects the hope for God's reign in our midst.

Create a list of the diversity that is present within your congregation (that includes the pastor).

What gifts of cultural diversity are in your community that may not be present (or as strongly present) in your congregation?

Are there any barriers that keep the church from connecting with the gifts of the community?

In what ways could the diversity of your church be a blessing to the community?

In what ways can the diversity of the community be a blessing to your church?

Resources for Your Transition Team

The next several pages provide resources that you can use to lead your congregation in the transition that has already begun.

INFO-PAK

Every departing pastor, along with the Pastor (Staff) Parish Relations Chairperson, is responsible for supplying the following INFO-PAK to the incoming pastor. These items should be available as soon as possible, to facilitate a smooth transition.

Church Documents:

- Alphabetical membership roles with address, phone, and email information.
- Current Directory of Community leaders, and Elected Officials (with contact information and updates of most recent elections)
- Past two year's Church Conference Reports
- Past two year's Year End Statistical Reports
- Past two year's and current year's Budgets & Treasurer's Report & current year to date (Later updated to June 30th)
- Previous year's Detailed Attendance & Stewardship records & current year to date (Later updated to June 30th)
- A summary of attendance and stewardship records for the last 5 years.
- Past two year's Financial Audits & Complete Current list of all accounts and liabilities
- Pastoral Transition Audit

Pastoral Contact Information

- Complete church directory with address, phone, and email information
- Most recent pictorial directory
- Most recent prayer list and list of "concerns & joys"
- List of shut-ins and those with physical or other capacities impacting participation with the congregation
- List of prospects and recent visitors to the church activities
- County and municipal map
- Contact information for location and custodians of church papers and assets

Information for Conducting Church Business

- Detailed staff information (people, hours, job descriptions, etc.)
- Complete set of labeled keys, combinations, codes
- All codes and passwords (fire, alarms, computers, etc.)
- Equipment & supplies information
- List of services supplied to church and parsonage (with contact information) & all church contracts
- Church petty cash, church accounts, discretionary accounts and charge cards information
- Church calendar – with special emphasis on previously planned events
- Past two year's Bulletins (typical, communion, holidays, special Sundays) (guest & emergency preachers)
- Past two year's Church newsletters, congregational mailings and e-blasts.
- Links and appropriate access to current online presence

Helpful Neighborhood Information

- Post offices
- Food (Grocery stores, eat-in, take-out, convenience)
- Auto repair shops
- Medical assistance (emergency care, hospitals, doctors, dentists, vets, etc.)
- School information
- Directions & warranties (with service & repair information) for all church & parsonage equipment
- List of parsonage information (i.e., emergency switches, thermostats, etc.)
- Trash, recycling and bulk days
- Lawn care & snow removal information

Pastoral Transition Audit

The pastoral transition audit is designed to establish a baseline for new ministry and to help ensure an appropriate ministry accounting. The following questions are to be completed by the new pastor in consultation with the former pastor and emailed to the Superintendency Administrative Assistant serving your congregation by July 1. An updated report should be provided by September 1.

1. Average worship attendance reported in the previous year's statistical report submitted to the conference.

Average worship attendance for the first six months of the current year. _____

2. How often did the Staff Parish Relations Committee meet during the previous year? _____

How many times has it met since January 1, of this year? _____

3. How often did the Church Council meet in previous year? _____

How many times has it met since January 1, this year? _____

4. Does the pastor have a discretionary account? Yes No

If yes, was there an internal audit by the Staff Parish Relations and Finance Chairpersons of the accounting at the time of the pastoral transition? Yes No

If no, an audit is to be conducted immediately.

5. What percentage of shared ministry was paid from January 1 to June 30, of the current year? _____

6. What percentage of direct bills (pension, health and property insurance) was paid from January 1 to June 30, of the current year? _____

7. What percentage of shared ministry and direct bills are anticipated to be paid by the end of the year?

8. Are there any financial concerns within the congregation? Yes No

If yes, please describe.

9. All healthy congregations engage in appropriate disagreement that has some level of conflict. It is not unusual to experience level one and even level two conflict. Read the statements of conflict below and indicate the level within the congregation. My assessment is that the church is a level _____ conflict.

Definitions:

Level One: There's a problem to solve in the church, and people may disagree about how to solve it. But they believe they can work it out, and they are committed to try. They are talking directly to each other, not withholding information. As a result, most people don't call this conflict. They say, "We've got problems to solve, but we can do it."

Level Two: The focus shifts from solving the problem to caring for myself. People feel, we've got a problem to fix, but I don't want to be associated with it. I'm going to be cautious, armor myself, plan before I talk to the pastor. I'll talk with other people, but not share fully all I know about the situation. People are nervous, which you can tell because they generalize everything: "We're not communicating. There seems to be low trust around here. There are some difficulties with the choir." But they don't describe the problem specifically. The role of the pastor, then, is to get people talking.

Level Three: Again, the objective has changed. It's no longer, "Fix the problem", or "Protect myself;" it's "Win." People feel, you must accept my solution. It's win or lose. I'm not contributing to the difficulty; I'm the good person who has the only possible answer.

The language in such cases is not only vague, it also overstates, distorts, and dichotomizes the conflict. For example, "Pastor, the whole church is out to get you. We are split down the middle. A few bad apples should not be in the church at all. They're never going to change."

People are not yet in factions, but they clump together, and we give them labels: "The pastor's buddies," "the old pillars of the church."

The pastor's role is to create a safe environment for people to air concerns and start solving the, which means thinking a lot about who should be in what conversations and how we can affirm people and hear their concern.

Level Four: People are no longer satisfied with getting their way. Now they have to get rid of the opposition. The goal is a "divorce"—getting people to quit coming to church, firing the pastor, or disbanding a committee or ministry. People are now in factions, usually meeting in homes. There is a clear leader, sometimes two, who gives marching orders to each faction.

At this level, it's wise to get outside help: denominational officials, a consultant, a skilled pastor or lay leaders from another congregation.

Level Five: People won't settle for getting people to leave; now they want to remove them from the face of the earth. In a church, the people are not satisfied with a resignation; they want to have the pastor "defrocked."

10. What additional information is it important for the superintendent to know?

Name of Church: _____ Date Submitted: _____

Name of pastor reviewing the form: _____

If there is an associate pastor, has the form been reviewed with the associate pastor?

yes no

Names of church leaders who have reviewed the form:

SPRC Chairperson

Outgoing Pastor

Incoming Pastor

A copy of this report should be provided to the outgoing pastor, the incoming pastor, the SPRC and the DS by July 1. An updated report should be provided by September 1.

Pastoral Transition Quarterly Check-in Report

Quarterly, Pastor and SPRC will each complete and submit separate Quarterly Check-In Reports. Please submit the Quarterly Check-In Report at the end of each quarter to the Superintendency Administrative Assistant serving your congregation.

Report Completed by: (Check one) **Pastor** **SPRC**

Church Name: _____

Pastor Name: _____

S/PPR Name: _____

Place the number that appropriately corresponds with your view.

Rate as follows: **(1) Strongly Agree; (2) Agree; (3) Disagree; (4) Strongly Disagree**

| EVALUATION AREA | 9/30 | 12/30 | 3/30 | 6/30 | 9/30 | 12/30 |
|--|------|-------|------|------|------|-------|
| UNDERSTANDING & RELATIONSHIP BUILDING | | | | | | |
| A sufficient number of introductory small group meetings have been held with laity. | | | | | | |
| The Pastor has conducted one to one meetings with key church leaders. | | | | | | |
| The Pastor is connecting well with the congregation(s). | | | | | | |
| EXPECTATIONS | | | | | | |
| Fruitful conversations with SPRC and Church Council have been held about expectations. | | | | | | |
| The Pastor understands the expectations of the congregation. | | | | | | |

| EVALUATION AREA | 9/30 | 12/30 | 3/30 | 6/30 | 9/30 | 12/30 |
|---|-------------|--------------|-------------|-------------|-------------|--------------|
| The Pastor is meeting the church's expectations. | | | | | | |
| Initial six month objectives were set and are being worked on or are completed. | | | | | | |
| 12 month congregational goals have been set for the upcoming calendar year. | | | | | | |
| Progress is being made on the 12 month goals. | | | | | | |
| 12 month goals are appropriate for moving the church towards vitality. | | | | | | |
| Quarterly evaluations have been completed in a timely manner. | | | | | | |
| FRUITFULNESS | | | | | | |
| Worship attendance is growing. | | | | | | |
| We are seeing more visitors. | | | | | | |
| More people are attending small group and Bible studies. | | | | | | |
| More people are engaged in community ministry. | | | | | | |
| Giving has increased. | | | | | | |
| COMMENTS: Please enter below, including date. | | | | | | |
| | | | | | | |

Some Interesting “Conversation Topics” For Church Groups (Some Things Your Church & All New Pastors Will Want to Discover)

When any group gets together, they share ideas, information, insights and opinions. Sometimes we miss opportunities to intentionally direct our conversations toward topics that could produce helpful data for our church. Here are some topics that most people find invigorating. Often the results of these discussions are enlightening. Surely every new pastor wants to know the answers to these questions. The list might be helpful to your church.

A. What is the context of our ministry?

1. What is happening in the congregation?
2. What is happening in the community?
3. What are the trends for both?
4. Who is our constituency? (Those for whom we are responsible)
 - a. Geographic, economics, education, ethnicity, etc.?
 - b. Areas of concern, special populations, etc.?
 - c. How do our demographics compare with the community?

B. Identity

1. Who are we as a congregation?
 - a. Religious perspective?
 - b. What is our history?
2. Do we have a vision for our future?
3. What has changed about us?
4. Where are we headed? Where do we hope to head?
5. What are our leadership needs?
6. What needs to be done? What changes must we make?

C. Program / Ministry

1. What is our understanding of worship?
2. What are our ministry priorities, with benchmarks and timelines?
3. Where are we addressing ministry needs? Where are we not addressing them?
4. Do we focus on member needs or those in the wider community?
5. How do we understand ourselves as a United Methodist congregation?

D. Process

1. How do we make decisions?
2. What are our communication networks?
3. What are our leadership styles?
4. What are our norms for behavior?
5. What are the informal networks of power?

E. Helpful Information

1. What do the census studies say about our ministry opportunities?
2. Church data – who really “knows” and how is information shared?

3. What are the programs of our church and who makes it happen?
4. What are Our Stories?
5. Interviews with community leaders – Who do they say that we are?
6. Do we have an inventory of present and potential leadership (a talent bank)?



50 Ways to Welcome your New Pastor or Associate Pastor

From the Lewis Center for Church Leadership Prepared by Robert Crossman

Prepare to welcome your new pastor

1. Open your hearts and decide that you are going to love your new pastor.
2. Begin praying daily for the new pastor and family, even as you continue to pray for your departing pastor and family.
3. Invite church members individually to send cards of welcome and encouragement to the incoming pastor.
4. Know that welcoming your new pastor in genuine and effective ways lays the ground work for a healthy and vital relationship and the development of stable, long-term ministries together.
5. Plan for the transition. Occasionally important welcoming gestures are missed with everyone thinking someone else is handling these details.
6. Appoint a specific liaison person to whom the pastor can go for help and information during the transition.

Say goodbye to your current pastor in a healthy way

7. Show love, regard, and even grief, for your departing pastor. This is one of the best things you can do for the new pastor.
8. Acknowledge the change in public ways. Especially in the case of a much-beloved pastor, this allows the congregation better to let go and receive the new pastor.
9. Provide the congregation the opportunity to say thank you and goodbye to the outgoing pastor, even if things have not always gone well.
10. Find appropriate occasions — in worship and at other times — to thank the outgoing pastor.
11. Express appreciation in ways that are consistent with what you have done in the past.
12. Consider giving the pastor the last two weeks off. This helps the pastor enter the new situation rested and gives an emotional buffer between one pastor's last Sunday and another pastor's first Sunday.
13. Plan goodbye celebrations prior to the beginning of the two weeks off.
14. Provide information to the local media about the outgoing pastor's accomplishments and future plans.
15. Do not invite the former pastor to return for weddings, funerals, or baptisms. This allows your former pastor to engage fully with his or her new congregation, and it establishes your new pastor as everyone's pastor from the beginning.

Make things move-in ready

16. Make sure the parsonage and pastor's office are clean and ready. Offer to provide help or a cleaning service if needed.
17. Determine if the parsonage is in need of repairs or painting. Consult the outgoing and incoming pastors about timing so as not to disrupt the lives of either party. Do not ask a new pastor to move into a parsonage "under construction."
18. Consult the new pastor on any paint, design, or furnishings issues.
19. Offer to have someone cut the parsonage grass.
20. Make sure the new pastor and church officials are clear on how moving expenses are paid and all matters related to compensation, benefits, and reimbursement policies.

Welcome your pastor on moving day

21. Stock the parsonage refrigerator and pantry with some staples.
22. Make sure there are kid-friendly foods and snacks in the refrigerator if children are arriving.
23. Have a small group on hand to greet the new pastor and family when they arrive and to help as needed.

24. Offer child care if there is an infant or toddler in the household.
25. Invite children in the household to do things with others of their same age.
26. Welcome any youth in the household by having church youth group members stop by and offer to show them around.

Continue the welcome during the entry period

27. Take food over for the first few days. Many churches continue the practice of having a "pounding" for the new pastor when persons bring food items.
28. Provide a map with directions to local dry cleaners, grocery store, drug store, veterinarian, etc., and information on local options for internet and cable television providers.
29. Give gift certificates to several of your favorite restaurants in the community.
30. Give the pastor and family a welcome reception on the first Sunday.
31. Plan a worship celebration of the new appointment.
32. Invite the new pastor to any social events held by Sunday School classes or other groups in the early months.
33. Make sure the pastor's spouse and children, if applicable, are invited to Sunday School and other appropriate small groups.
34. Continue to remember your new pastor and family in your daily prayers.

Help the new pastor become familiar with the congregation

35. Introduce yourself to the pastor repeatedly! You have one name to learn; your pastor has many names to learn.
36. Wear name tags. Even if name tags are not a tradition, the congregation can wear them for a few weeks to help the pastor learn names.
37. Provide a current pictorial directory of all the church members, if available.
38. Provide an up-to-date list of all church committees and officers.
39. Provide the new pastor with a tour of where things are kept inside the church and perhaps a floor plan of the facilities.
40. Orient the new pastor to information systems and the way records are kept.
41. Make sure the pastor has a list of home bound or nursing home members, a list of those struggling with long term illness, and a list of those still in grief over recent deaths in the family. Better yet, take the pastor for an introduction to each of these households.
42. Have an appropriate person offer to go with the pastor for introductions and support if there are particularly urgent pastoral situations (a member near death or the family of a member who has just died).
43. Have a lay official offer to take the pastor to meet church members in their businesses or other work settings, if they are easily accessible.
44. Offer to help arrange small group sessions to meet and talk with the congregation.
45. Create a "church yellow pages" (a list of people in the church who have specific skills that a newcomer may find beneficial.... auto mechanic, doctor, dentist, dry cleaners, book store, office supply, etc.).

Help the new pastor connect to the community

46. Provide local media with information about the new pastor.
47. Provide a list of hospitals, nursing homes, and community service agencies.
48. Introduce your new pastor to other clergy in the community. Provide information on any ecumenical activities or associations.
49. Introduce the new pastor to public and community leaders.
50. Ask church members in civic clubs to take the new pastor to one of their meetings.

A History Sharing Experience

An interesting experience in a congregation that has received an incoming pastor is a time for history sharing. It is a time for persons in the congregation to gather, to share stories of their life together, and to reflect on what it means for the congregation at this time. It makes a great fellowship activity. Such an experience can be helpful to the church and the incoming pastor in several ways:

- a. It assists the inclusion process. The pastor becomes one of us when he/she knows our stories.
- b. Key events in the life of the church are shared.
- c. Insights into past successes and failures are gained.
- d. One learns who are the pastors of the past and who in particular is the one by whom the current pastor will be judged.
- e. Assists the incoming pastor and leaders to assess what the meaning of all of this is for the congregation.

Arrangements:

- a. About a three-hour block of time is desirable for discussion.
(It always goes well with a potluck supper.)
- b. Have a listing of previous pastors and dates available.
- c. Put up a 20-foot length of newsprint that can be used to create a time line. Have a newsprint pad in addition for recording reflections.

Process:

- a. Enter the dates and pastors across the top, allowing enough room for writing information below their names.
- b. Questions to ask the group include:
 - What are the most important happenings when each pastor was here?
 - What are the implications of the successes, e.g. a new worship service?
 - How do the failures affect us today?
 - Where are the high points in the congregation's life? The low points?
- c. When this has been done you want to probe for meaning statements. This can be done as a total group if it is small. Otherwise, have them break into groups of 6-8. Collect the following responses on newsprint.
 - General observations
 - What do you make of this?
 - What concerns you?
 - What tells you who you are?
 - What are your key strengths?
 - What should be a part of your future?
- d. If the group has done "c" well, you may want them to try to prioritize the meaning statements. It becomes part of the process to come to terms with their history.
- e. What does this say about our future?
 - Develop goals to build on our strengths – stretch toward new ministry.
 - Develop strategies to overcome weaknesses – let go of what doesn't work.

Stages of Spirituality

Stage 1-Dependence

- We develop basic trust
- We have a sense of wonder and openness toward the world
- We are dependent on others

What does it look like in a congregation

- Wounded individuals are often at this stage
 - o They cannot relate to the church because God has been introduced as part of an abusive system of guilt and shame
 - o They are susceptible to charismatic leaders and founders of religious cults
- Change is always a problem
- Can be highly dysfunctional
- Usually have dominant matriarch/patriarch who controls decision-making
- They are focused on self-protection; everyone out for self
- Their deep desire is to belong

Where do we begin

- It is essential to establish trust, encourage wonder and intimacy with people and with God
- Teach
 - o Scripture, traditional stories (help evoke their sense of mystery as they hear Bible stories)
 - o Church history (learn common language, what and why we say and do)
 - o Rituals and sacraments (history and heritage, the why)
 - o Basic spiritual practices (basic prayer and meditation, praying and listening; i.e., lectio divina, simple Examen, introduce journaling)
- Hold healing services, sponsor 12-step ministries, encourage healthy spiritual formation
- Need strong, mature, loving pastor and leaders; love needs to be communicated in all things

Stage 2-Counterdependence

- We form a new identity by becoming part of a group
- We differentiate ourselves
- We fight to have a voice of our own, to find a new identity as a member of the group

What does it look like in a congregation

- o Highly skeptical of church
- o Have doubts
- o Take justice into their own hands
- o Devoting themselves to a cause seems exciting; gives a sense of purpose
- o Focus tends to be worldly affairs; preoccupied with things other than God
- o Need affirmation of group
- o Very competitive, often driven
- o Jesus is the 'hero' but this can lead to dysfunction

- Congregations often split into factions at this stage
- Will resist a 'mission statement'
- Little real learning happens here
- Will rebel at authority

Where do we begin

- Important to set boundaries, be clear about rules, be clear who has decision-making authority, clarity on structure and hierarchy
- New ideas will need buy-in and support from matriarchs/patriarchs; change continues to be problematic
- Need to move power to church council, not with resident matriarch/patriarch; draw on denominational rules for support
- Need strong, mature leader; leader needs to take initiative, share rules of denomination re leadership responsibilities
- Teach
 - Stress scripture study, go deeper, begin to integrate traditional stories
 - Accountability for behavior (self-awareness is important, explore personality inventories)
 - Focus on intercessory prayer (for the sake of the other)
 - Small group participation, be clear about intent
 - Continue to teach history and heritage, denomination
 - Spiritual practices that focus on listening, discernment, and being present to God
- Provide more mature Christians as mentors
- Start council meetings with scripture; expand opening prayer into short Bible study; include time for sharing what God wants us to do; set tighter controls over agenda and time frame

Stage 3-Mutual dependence

- Mature and take responsibility
 - Sense of duty and belonging
 - Can accept discipline and can discipline self
 - Hierarchy of dependence remains (there are rules and principles the group operates by; we have by-laws, tradition, scripture)
 - Unhealthy co-dependency can develop
 - Easy to regress when things go poorly

What does this look like in a congregation

- Spirituality focuses on belonging, making commitments, doing one's duty
- Dependent on leaders to control; tell them what to believe; committed to hierarchical authority
- These churches are always busy; leaders often burn out
- They rely on the experts; ministry is a performance; their learning is focused on sermons, books, words of those deemed more knowledgeable
- Tend to be self-centered
- Change will be a big production; continues to be threatening

- Their tendency is to give too much power to leaders, they fail to grow and become who God calls them to be
- There is often a transitional stage (3.5) before moving to stage 4
 - A tension develops between seeking more and remaining comfortable
 - Seek meaning at a deeper level
 - Strong desire to discern God's desire for their life
 - Disillusioned with 'success' as culture defines it
 - Suffer at the death of their ideals, the death of the God they used to believe in
 - The liturgy/worship structure no longer holds the same meaning
 - Begun to notice their soul and to move away from group-imposed values
 - Church shop looking for 'spiritual' leader/teacher

Where do we begin

- Invite individuals to listen for the 'angel of the church' (what is the corporate culture); ask them to share their God stories/moments
- Easiest place to begin is worship; offer periods of silence during prayer or after scripture reading; encourage meditation/reflection
- Keep asking the question "Where is God calling you/us?"; what does it mean to make disciples
- Teach
 - Develop deeper understanding/awareness history and heritage (what are the underlying theological issues)
 - Teach Wesley's quadrilateral (how we discern if something is of God)
 - Develop deeper theological awareness and understanding
 - Spiritual practices focused on listening for and hearing God 'speak'; i.e. Ignatian exercises, discernment practices, walking the labyrinth, pilgrimage
- Areas that encourage growth
 - Empowering leadership
 - Gift-focused ministry (not just what their gifts are, but how to integrate into ministry)
 - Inspiring worship services
 - Small groups walking together in important ('How is it with your soul?' focus)
 - Need-focused evangelism (use scripture to explore why)
 - Loving relationships
 - Functional structure
- Need loosening of order and structure; allow Spirit to lead; allow inner vision to emerge
- Need pastor who is focused on empowering leadership, not holding leadership
- Need to decentralize decision-making
- Council meetings; introduce silence; ask people to speak their truth not debate, invite people to pray for a month before making a decision if there isn't consensus; introduce models of discernment; consider a council retreat; get big picture and renew vision

Stage 4-Independence

- Developed an inner authority and sense of responsibility for self
 - o Able to operate in the dark (of soul and spirit) at times
 - o Accept aloneness
 - o Old ways of knowing God have been eclipsed
 - o Can accept failure

What does this look like in a congregation

- They are better able to listen and let go of the boxes they have put God in
 - o Want something more, something deeper
 - They want to be obedient to God
 - o Willing to surrender more fully to God
 - o Don't have to be in control
 - o Embrace mystery
 - o Need a spiritual support system; i.e., small groups
 - o Need a mentor, spiritual guide
 - o They listen to each other, hear the need for change, and listen to God
 - o More comfortable with others at same stage
 - o Can become obsessed with their spiritual journey, a particular type or style of prayer
 - o They can become impatient with those who have not progressed

Where do we begin

- Need to move past doubt and uncertainty
- Need to focus on inner clarity and outer service and ministry
- De-centralize power allowing ideas to initiate and bubble up from community
- Focus authority directly from God, revealed through the Holy Spirit and in scripture
- Engender high level of trust; delegate rather than lead directly
- Transition from stage four is the most difficult; they will most likely move through a 'dark night' experience; greater surrender is called for
 - o Help them understand what a 'dark night' is, how to move through it
- Focus on practices that are directed at personal experiences of God
 - o Need guidance in testing these experiences (small groups, spiritual director)
 - o Need to learn how to trust experiences
- Discernment a critical practice

Stage 5-Interdependence

- We are able to be in community in new ways
 - o We are living as our true, authentic self
 - o God is in our midst
 - o God is in all things and we are prayed through
 - o God reveals God's self in new ways
 - o God abides in us and we in God

What does this look like in a congregation

- Fairly rare
- More focused on following an inner call
- Less interested in participating in 'church' as we know it
- Embrace the paradox and mystery of God
- Have a clear sense of the presence of God
- Tend to be self-directed learners
- Better balance of work and play; strong interconnection between the two
- Organizations are highly flexible and responsible to the movements of the Spirit
- No hierarchy, decisions are consensus based
- Individuals may be out of touch with practical things
- May not be focused on denominational concerns
- May not always seem productive to the outside eye
- Sometimes lose sight of the goal, too focused on process
- Can believe they have 'arrived' and not attend to continuing transformation

Where do we begin

- Discernment critical practice
- Remaining connected...small groups
- Encourage to model and mentor
- How do we live our faith in ministry and service (focus on giftedness)

Primary source, *Listening to God: Spiritual Formation in Congregations*, John Ackerman, Alban Institute, 2001.

Direction in the Various Stages of Spiritual Development, Rose Page, *Contemplative Review*, Fall 1979, pg. 11-18.

The Collected Works of St. Teresa of Avila, Volume Two, Kieran Kavanaugh & Otilio Rodriguez, ICS Publications, 1980.

Worship Resources

Farewell Service:

On the current pastor's last Sunday in a church (or other chosen date), there should be an appropriate farewell service, in which the pastor can express his/her thanks for the time shared with the congregation and the congregation can prayerfully bid their pastor farewell.

Installation Service:

On the incoming pastor's first Sunday in a church (or other chosen date), there should be an appropriate installation and welcoming service, in which the pastor can express his/her initial vision for the congregation and the congregation can have the opportunity to express a hospitable welcome.

Re-Appointment Service:

If there is no pastoral change, on the first Sunday of a new conference year the congregation and pastor should engage in an appropriate "anniversary" – i.e., Re-Appointment celebration, in which the pastor can express his/her visions for ministry in the coming year. The congregation can welcome him/her back to the church for a new conference year.

Note: It is suggested that liturgy in the **Book of Worship* and other resources may be used to guide these services.

* Farewell p. 598-599

* Installation p. 595-598

* Re-Appointment p. 595-598

Notes