

THE ELEPHANT in the BOARDROOM

SPEAKING THE UNSPOKEN
ABOUT
PASTORAL TRANSITIONS

How to Think About and Create a Strategic
Succession Plan for Your Church

CAROLYN WEESE
J. RUSSELL CRABTREE

A LEADERSHIP * NETWORK PUBLICATION

Contents

[List of Exhibits](#)

[Preface](#)

[Acknowledgments](#)

[Introduction](#)

[Part One: The Principles, Cost, and Players in Health-Based Transition](#)

[Chapter 1: Principles of Transition, Jesus Style](#)

[Jesus Did It Differently](#)

[Chapter 2: Counting the Cost](#)

[Review the Invoice](#)

[Beyond the Dollar Cost](#)

[Good Intentions, Costly Results](#)

[Staff Retention Plan](#)

[The Big Picture of Long-Term Cost to the Church](#)

[Chapter 3: The Five Key Players in a Healthy Transition](#)

[Healthy Transition Defined](#)

[Illness-Based Transition](#)

Health-Based Transition
Shaping the Team

Part Two: The Four Church Cultures: Family, Icon, Archival, and Replication

Chapter 4: One Church, Four Variations

Understanding Church Cultures
What Drives a Church?
The Four Cultures

Chapter 5: Transition Strategies for Leaders in a Family Culture

Leadership Transition Advantages
Risks in Choosing a Candidate
Critical Transition Tasks
Threats to Success of the New Pastor
Transition Strategies
Advance Planning
How It Could Be

Chapter 6: Transition Strategies for Leaders in an Icon Culture

Leadership Transition Advantages
Risks in Choosing a Candidate
Critical Transition Tasks
Threats to the Success of the New Pastor

[Transition Strategies](#)

[Advance Planning](#)

[How It Could Be](#)

[Chapter 7: Transition Strategies for Leaders in an Archival Culture](#)

[Leadership Transition Advantages](#)

[Risks in the Appointment Process](#)

[Critical Transition Tasks](#)

[Threats to Success](#)

[Transition Strategies](#)

[Advance Planning](#)

[How It Could Be](#)

[Chapter 8: Transition Strategies for Leaders in a Replication Culture](#)

[Leadership Transition Advantages](#)

[Leadership Transition Risks](#)

[Critical Transition Tasks](#)

[Threats to the Success of a New Leader](#)

[Transition Strategies](#)

[Advance Planning](#)

[How It Could Be](#)

[Part Three: Components of a Transition Plan](#)

Chapter 9: Strategic Planning and the Search Process

Resistance to Planning Strategically

Maintaining What is

Charting the Right Course

Can a Culture Change?

Elements of a Strategic Planning Process

Illness-Based Transitions and Bridging Resources

Transitional Schematic

Chapter 10: The Asset-Preserving Ministry

Unique Mission Components

Identifying Unique Mission Components

Transfer of Assets

Transferring the Assets

Chapter 11: A Capability-and-Maturity Model for Churches

The Stewardship of Leadership

Capability at the Time of Transition

The Story of Glendon Community Church

Distinct Needs at Every Level

Chapter 12: Pastoral Transitions in Low-Performing Churches

Focus on Best Practices

Develop Patching Strategies

[Emphasize Organizational Learning and Development](#)
[Leaders and Creating Change in Culture](#)

[Chapter 13: A Plan for Responding to the Crisis of Sudden Transitions](#)

[Elements of a Crisis Plan](#)

[Chapter 14: Getting Started on a Plan for Your Church](#)

[Appendix: The Church Planning Questionnaire](#)

[The Authors](#)

[About Leadership Network](#)

[Index](#)

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“This practical book should be in the hands of every pastor and board chair. It provides the right answer to one of the most neglected areas of church life today—effective leadership transition in the local church.”

—Dr. William O. (Bill) Crews, chancellor, Golden Gate Baptist Theological Seminary, Mill Valley, California

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“Crabtree and Weese expose the huge costs and avoidable causes of poor pastoral transitions. They offer a wise strategy to prepare for the inevitable leadership changes every church will face.”

—Dr. George K. Brushaber, president, Bethel College and Seminary, St. Paul, Minnesota

The Elephant in the Boardroom

Speaking the Unspoken
About Pastoral Transitions

Carolyn Weese
J. Russell Crabtree

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List of Exhibits

[Exhibit 1.1 Pastoral Transition Principles](#)

[Exhibit 2.1 If Your Pastor Were to Leave in Six Weeks and It Would Take Eighteen Months to Find a New One](#)

[Exhibit 3.1 Indicators of Congregational Health](#)

[Exhibit 3.2 Can You Mentor Your Successor?](#)

[Exhibit 4.1 Four Church Cultures](#)

[Exhibit 4.2 Four Church Cultures, with Examples](#)

[Exhibit 4.3 Personality-Driven Style Churches: Family Culture](#)

[Exhibit 4.4 Personality-Driven Effectiveness Churches: Icon Culture](#)

[Exhibit 4.5 Knowledge-Driven Style Churches: Archival Culture](#)

[Exhibit 4.6 Knowledge-Driven Effectiveness Churches: Replication Culture](#)

[Exhibit 5.1 Transition at a Glance: Family Culture](#)

[Exhibit 6.1 Transition at a Glance: Icon Culture](#)

[Exhibit 7.1 Transition at a Glance: Archival Culture](#)

[Exhibit 8.1 Transition at a Glance: Replication Culture](#)

[Exhibit 10.1 Pastor-to-Pastor Debrief Checklist](#)

[Exhibit 11.1 Capacity-and-Maturity Tool](#)

[Exhibit 11.2 Composite Analysis: Capability and Maturity](#)

[Exhibit 11.3 Transitional Needs by Capability-and-Maturity Level](#)

[Exhibit 11.4 Comprehensive Transition Plan Components](#)

[Exhibit 12.1 Transition Strategies for Low-Performance Churches](#)

Preface

For more than twenty years, we have been consulting with, researching, and surveying hundreds of churches of all denominations, sizes, locations, and theological persuasions. During that time, we have seen many changes, some of them heartening and others not so encouraging. One aspect has been consistent across all these churches: they do not plan for the inevitable moment when their current pastor leaves. Given the intimate connection between a congregation's morale and its pastor's worship leadership, we were troubled when we saw that most churches do not have a plan in place to sustain excellence and continuity in succession planning. Writers in the business and leadership world have dealt extensively with the subject, but there are no foundational concepts for handling it successfully in the church world.

With this book, we offer a resource that is both practical and inspirational. It is born of the hope that by helping people face their fears and at the same time provide them with a quality resource, churches will be better able to make a successful transition from one leader to another. We are challenging the reader to think outside the box and grasp new concepts for healthy pastoral transitions. It is our prayer that this book will break the silence about the elephant in the church boardroom and guide clergy and lay leaders, drawing them together to pray, discuss, and plan for pastoral changes that sustain excellence of ministry at the time of a leadership transition.

June 2004

Carolyn Weese

Russ Crabtree

*To the Crabtree Family Emily, Mark, Sarah, Elizabeth, and
Michael
And to the Weese Family Harvey, Karen, Jim, Austin, and
Taylor*

Acknowledgments

Though a book may be penned by one or two hands, there lies behind the writing a company of people who have provided insight, guidance, support, wisdom, life experience, encouragement, and much more. As two explorers on a journey into the wilderness of succession planning in the church, we found we were charting a course rather than following an already prescribed direction. Our experiences in the church over the past twenty years have shaped much of who we are and what we have written. Acknowledging all of the churches, pastors, and people who contributed to our thinking is impossible. However, it is important to mention a few names. Linda Karlovec was a constant source of insight. Leta Cook and Vicki Rush, as friends and church workers, offered continual encouragement. Harvey Weese would not allow us to lose the dream for this book and patiently endured the long days of collaboration.

We also express a special word of appreciation to David G. McKechnie (pastor) and Terry Looper (elder) of Grace Presbyterian Church, Houston, Texas, for catching the vision with us while it was in its infant stage and encouraging us to move forward with the project. We deeply appreciate the very special part they played in making this book possible. Dan Klein, of Texas Presbyterian Foundation, caught the vision for the book as well and spread it among his colleagues.

When we first discussed the possibility of such a book with Carol Childress, of Leadership Network, she responded enthusiastically. Her constant support for the project confirmed that we did have a story that needed to be told.

Last, but certainly not least, without God's help it would not have been written. According to His plan, calendars were opened to make time available, funding was furnished, and two colleagues successfully narrowed the space between Ohio and Arizona in order to collaborate on the work. To God be the glory!

Introduction

I have no greater joy than to hear that my children are walking in the truth.

—3 John 1:4 (NIV)

The fact that you have picked up this book and begun to read it says something about you. You are probably a leader in the church, lay or pastor, and are likely a think-outside-the-box leader. What you may be thinking about in this season of your life is one of the most important questions you will have to tackle as a leader: pastoral transition. How you handle this question determines whether or not you will have the greatest joy of which John speaks, a strong legacy of faith in the lives of those you have led. Whether pastor or lay leader, think for a moment about these questions:

- Do you have a strategic plan that defines where your church is going and how you are going to get there?
- Do you have a clear understanding of your particular church culture and the specific advantages and risks posed to that culture by a pastoral transition?
- Have you had an honest, structured discussion with your governing board about what is going to happen to the church when the pastor leaves?
- Does your governing board have a clear, Biblically based, shared understanding of the spiritual principles that should inform a pastoral transition process?
- Do you have a pastoral transition plan in place that describes in detail how your church will maintain excellence at the point when the current pastor leaves and a new pastor is called?
- Do you have a crisis plan in place, should something happen that requires the pastor to leave suddenly?

- Have you identified in advance the consultant resources you will need in order to make a successful pastoral transition, and have you made sure they have a proven track record of effectiveness? This includes denominational agencies serving as consultants.
- Has your governing board calculated all the various costs that would be associated with a poorly managed pastoral transition?

If you are like the large majority of church leaders in the United States, your answer to most of these questions is no. When it comes to dealing with a pastoral transition, many strong leaders stop leading, and it is likely that they are heading toward a story that may sound familiar to you.

The Story of Meadowbrook Church

This is a story about a pastor named Pete. Pete was a good pastor and a great guy. He served Meadowbrook Church for ten years, and the church grew to about twice as big as it was when he came. One day Pete decided that the Lord wanted him to move on to another church. Now, Pete wanted to do this right, and doing it right meant making sure that *no one at Meadowbrook knew he was thinking of leaving*. On the day he decided that the Lord wanted him to move, Pete realized he would have to live a double life. This was a change, because generally speaking Pete was a person of integrity. He was about to live a part of his life in secrecy.

He went on living the life he had lived for ten years at Meadowbrook, the one that everyone had come to know and appreciate. But secretly Pete was living a second life off the radar screen. He was praying for a new call. He was talking to his family about moving. He was scheduling secret

meetings after worship with strangers who had come to hear him preach. He was telling people he was off on vacation when he was really looking at other churches. He was having his mail sent to his home rather than to the church, and he set up a separate e-mail account with its own password.

Pete was incredible as a secret agent pastor. He was able to live these two separate lives for a full eight months. He baptized babies, prayed for the sick, ran board meetings, and preached great sermons (many of which he secretly duplicated to send to other churches). Not a single person at Meadowbrook caught on to the other life that Pete was leading behind the scenes.

The phone rang one day, bringing news of a call to Riverton Church. Pete scheduled a meeting with the Meadowbrook board, announcing that he would be leaving in three weeks. One party (a real gush-and-blow), five speeches, and ten boxes of Kleenex later, Pete was gone. As he drove his family across three states to their new home, he thought, *I did it! I was a secret agent pastor for eight months. And no one figured it out!*

Three blocks away from Meadowbrook lived a woman named Betty. She was on the board, and for about eight months she had been worrying about what would happen to the church if Pastor Pete ever left. But Betty didn't say anything because she knew that even if Pete was thinking of leaving, he was not supposed to tell anyone. Like Pete, Betty did it "right." She sat through eight months of board meetings holding her tongue. All the time she voted, debated, and prayed on the outside, she was worrying and fretting on the inside. Betty was not talking about the most important concern on her mind.

For Pete, Betty, and other board members, this was the *elephant in the boardroom*. It was big. It was threatening. And everyone acted as if it weren't there.

One week after Pete left, Betty sat at a board meeting where people were trying to figure out what to do next. No one had a clue where to find a person to provide temporary pastoral services, so they ended up hiring a retired minister just to fill the pulpit during the search process.

Three weeks later, Betty was trying to understand the process for finding a new minister and learned that it would take about eighteen months.

Eight weeks later, Betty was at a board meeting where they received the resignation of the youth minister.

Ten weeks later she received the resignation letter of the associate pastor, who was afraid that she might not fit in with a new pastor.

Three months later, Betty and the board were looking at worship attendance figures that had dropped 20 percent since Pete's departure.

Four months later, Betty and the board were trying to figure out where to cut the budget in order to get through the rest of the year because giving had fallen off.

Six months later, Betty learned that two board members had resigned and were attending another church.

Eight months later, Betty heard that the search committee had a candidate ready to meet the board.

Nine months later, Betty learned that the candidate had changed his mind and wanted a larger church.

Ten months later Betty started getting angry phone calls from members that the process was taking too long.

Finally, *a year and a half* after Pastor Pete left, Pastor John began at Meadowbrook Church. Betty said to herself, *We did it. We survived the loss of Pastor Pete.*

When the new pastor arrived, he wanted to do things his own way. So he changed Sunday worship from 11:00 A.M. to 10:30 A.M. and added a guitar. No one told him that the top three givers in the church didn't believe in pledging, or that they golfed together every Tuesday. When he preached a

stewardship sermon about the evils of uncommitted members who refuse to pledge, he promptly lost about \$60,000 of income in the church. And because he didn't know that the lay leader's daughter had died by suicide five years earlier, when he preached a sermon about suicide being a self-centered act he lost two families in less than a week. Betty began to get phone calls regularly from members wondering why the new pastor was so out of touch with his members.

Church land is filled with good pastors like Pete, and good board members like Betty, who don't talk about the most important event that can happen to their church—the elephant in the boardroom, or call it pastoral transition. Because they didn't talk about it, everyone suffered. Pete sacrificed some of his integrity to live a double life. The board was thrust into a church crisis without a clue or forethought about what to do next. Pastor John stepped into a good church with a few land mines. Pete had known all about those land mines, but the new pastor stumbled onto and exploded them. The congregation felt betrayed by a process that left them weakened, diminished, and demoralized. On and on it goes.

Today, many churches talk about and develop some form of a strategic plan that they attempt to live into over a period of several years. Most often, those plans contain information about the renovation or building of facilities. They include financial information about budget and endowment funds and talk about the need to increase stewardship. A strategic plan also discusses the direction and expansion of ministries, and how those ministries will be staffed. But—too often—nowhere does a strategic plan discuss the particulars of preparing for a time when the present pastor will no longer be the senior pastor of the church. Succession planning is the second most important need in every church in the country (well-trained and

committed pastoral and lay leadership that is culturally relevant being the first), and few if any do it or do it well.

Pastoral Transitions That Fit the Church of Today

This book is for today. Unfortunately, we often operate out of a church paradigm that worked fifty years ago. In that era of high denominational loyalty, transitions were much less disorienting owing to off-the-shelf ministry approaches universally applied, simple programmatic paths to success (worship, Sunday school, youth group), an ample supply of ministers, and low mobility among church members. People tended to stay with a church through its transition, and the new pastor from Seattle used the same curriculum as the former pastor from Bloomington.

Today, ministry is much more localized, customized, specialized, and complex. What works in Seattle may not work in Bloomington. The high-stress culture in which we all swim is not one in which many people can survive a long period of tumult in their primary resource for emotional and spiritual stability. They move on to another congregation.

This book calls us to imagine a transition process that fits the church of today rather than the one of fifty years ago. For a moment, imagine a church:

- That is so invested in its mission that it is willing not only to break the taboo and talk about leadership changes but also to manage them
- With a vision for excellence in managing leadership transitions
- Where leadership changes do not blindsides or sidetrack the vision

- Where the vision manages change, rather than change managing the vision
- Where inspired leaders are insistent that the Body grow from strength to strength and from leader to leader, rather than from avoidance to chaos
- Where a clear, Biblically based plan is activated when leaders change
- Where veteran leaders mentor emerging leaders
- Where the specific gifts of the Body are called forth to manage transitions
- Where the sheep are not scattered by the wolf of denial and ambush but instead dwell in a confidence that is the fruit of studied readiness

The goal of this book is to move toward that kind of church.

For change to take place, we must recognize and honor the inner wisdom that guides people to do what they do. When intelligent, dedicated, God-loving, one-another-loving people sit together in a boardroom and choose not to talk about an issue that is so vital to everyone's well-being and obvious to everyone, they are not being obstinate or cowardly. They are responding to the feeling that they are not equipped to deal with the issue and that a poorly equipped foray into the unknown could make things worse.

Reshaping the leadership culture in churches to address the pastoral transition issues requires that people on both sides of the board table, lay and clergy, have tools that inspire confidence in a successful outcome. A workshop approach that equips one person on pastoral transitions and then requires him or her to market these ideas to restive fellows asks too much of both the individual and the culture. This book is intended for everyone in the boardroom. In fact, we strongly advise that every member read this book, before a board discusses this issue at any length.