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## Transitional Ministry 2.0: When Transitional Ministry Finds Itself in Transition

Brian Craker

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GEORGE FOX UNIVERSITY

TRANSITIONAL MINISTRY 2.0

WHEN TRANSITIONAL MINISTRY FINDS ITSELF IN A TIME OF TRANSITION

A DISSERTATION SUBMITTED TO  
THE FACULTY OF PORTLAND SEMINARY  
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DOCTOR OF MINISTRY

BY

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Portland Seminary  
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CERTIFICATE OF APPROVAL

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DMin Dissertation

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This is to certify that the DMin Dissertation of

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has been approved by  
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for the degree of Doctor of Ministry in Semiotics, Church & Culture

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## DEDICATION

In your infinite wisdom, you reached down from heaven and touched both the body and the soul of a young boy who was lost, broken-hearted and wrestling with grief. In that sacred moment, you opened a door that brought healing to my heart, an unconditional love into my soul, and a purpose for my life. Every chapter since has been a testament of your grace and providence. For that first moment, and all of life's moments since, there are no earthly words that can express my gratitude and worship. This work, and all that may come of it, I dedicate to you, oh Lord, the author and perfecter of our faith.

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*As iron sharpens iron, so one person sharpens another.*

*-Proverbs 27:17 (NIV)*

The culmination of this work is only because of the blessing of so many the Lord has brought into my life who have shared their wisdom, discernment, and mutual love for Christ.

One of God's most wonderful and precious gifts is the gift of family. For years, my family, both immediate and extended, have encouraged and pushed me to pursue this dream. To my amazing wife Alison, the wisest and most incredible person I have ever known, and more importantly, the person who has always been the most beautiful example of what it means to reflect God's unconditional love. To my wonderful boys, Tyler and Casey, who have shared with me a joy for life greater than I ever knew was possible. You are the next generation of Christian leaders. And to my extended family, for your support, encouragement, and much needed honest reflections. I never would have made it to the finish line without my family.

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## EPIGRAPH

*The secret of change is to focus all of your energy not into fighting the old,  
but on building the new.*

-Socrates

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## GLOSSARY OF KEY TERMS AND ABBREVIATIONS

**Board of Pensions** – Officially known as the “Board of Pensions of the Presbyterian Church (U.S.A.), the Board of Pensions provides medical, financial, and insurance benefits to its minister members. It traces its history back to 1717 with the first Presbyterian Synod meeting in the American Colonies. In 2017, it began making a portion of those benefits available to non-ordained Presbyterian employees.<sup>1</sup>

**COM** – “Commission On Ministry.” A standing committee in every presbytery made up of both pastors and ruling elders, with the primary purpose of overseeing the work of pastors, assisting churches in times of pastoral transition, and setting policies that promote healthy ministry settings. (Also referred to in some presbyteries as a Committee on Ministry.)

**Housing Allowance** – A national benefit afforded to recognized ordained ministers that permits a portion of their annual salary to be set aside for housing expenses. The housing allowance portion of a minister’s salary becomes tax-exempt with a required justification in expenditures when filing their annual tax returns.

**HR** – “Honorably Retired.” These are ministers who have retired in good standing, and depending on specific presbytery rules, are typically permitted to serve in limited capacities, including as temporary supply or transitional pastors.

**Installed Pastor** – An ordained minister who fills a permanent pastoral position at a local church. In many Presbyterian traditions, a permanent pastor is “installed” into their position in a special worship service near the beginning of their service at their new church.

**Interim Pastor** – Original term used by Loren Mead to designate a temporary pastor who provides pastoral leadership to a local church until that church is able to locate their next permanent pastor. This position is now being more often referred to as a Transitional Pastor within the PCUSA.

**Lay Leaders** – Volunteer leadership within a local church. Lay leaders can include elders, deacons, ministry, or mission outreach leaders.

**Organizational Development** – A critical and science-based process that helps organizations build their capacity to change and achieve greater effectiveness by developing, improving, and reinforcing strategies, structures, and processes.<sup>2</sup> Loren Mead’s early research into Organizational Development and its relevancy to the church

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<sup>1</sup> “Our History,” The Board of Pensions of the Presbyterian Church (U.S.A.), accessed on November 14, 2020, <http://www.pensions.org/our-role-and-purpose/about-us/our-history>.

<sup>2</sup> Erik van Vulpen, “What is Organizational Development: A Complete Guide,” AIHR Digital, last modified December 12, 2019, <https://www.digitalhrtech.com/organizational-development/>.



was the basis of his discovery of the critical importance of the work done during a pastoral transition.

**Pacific Northwest** – Geographic region of the western United States traditionally encompassing the states of Washington, Oregon and Idaho.

**PCUSA** – Presbyterian Church, U.S.A., the largest Presbyterian denomination in America, based in Louisville, KY. It can also be abbreviated as PC(USA).

**Presbyterian** – Protestant denomination with specific historical ties to the reformation movement of John Calvin in Geneva, Switzerland. Presbyterians tie their roots specifically to John Knox, a student under John Calvin, who founded the original Presbyterian tradition in Edinburgh, Scotland, in the 1560s.

**Presbytery** – Regional governing body. Each presbytery consists of at least 12 churches (with some containing over 100 churches) and is comprised of ministers and representative elders from the local churches. Nearly all Presbyteries are geographically based and typically also hold a minimum staff of at least a Stated Clerk, a treasurer, and an executive.

**Session** – Presbyterian term for a “church board,” the Session is the ruling body of a local church, made up of elders and pastor(s) charged with the church’s governance.

**Stated Supply** – A temporary pastoral position that can fill a vacant position but is not installed. Stated supply pastors are typically hired on annual contracts that can be renewed indefinitely and do not require specialized training. The intended purpose of stated supply positions is to fill a vacancy that falls outside the timeline restraints of a transitional pastor or to provide pastoral leadership to churches that are not stable or healthy enough to look for a permanent pastor in the short-term. In some presbyteries, a stated supply pastor can be converted into an installed pastor.

**Transitional Pastor** – Previously known as “Interim Pastor,” the Transitional Pastor is the new term being used for ministers who provide specialized leadership to churches that are in-between installed pastors. While not all Presbyteries have fully adopted this updated term, the term Transitional Pastor will be used almost exclusively for the sake of this dissertation.

## ABSTRACT

For churches within the Presbyterian tradition, as well as other mainline denominations, the use of interim and transitional pastors has been a mainstay for congregations in transition between permanent pastors. The current use of transitional pastors as a specialized pastoral position dates back to the original model established by Loren Mead and the framework created by the Interim Ministry Network in the 1970s and 1980s. This model has remained relatively untouched in the decades since its introduction but is no longer adequately addressing many of the issues facing local churches today. To help congregations navigate new and complex challenges, there is a need to reimagine the purpose and functions of the transitional pastor.

This dissertation will introduce the Transitional Ministry 2.0 model, which seeks to recognize some of the adaptive challenges currently facing churches, as well as to equip pastors and presbyteries to deal with these challenges and be successful in today's culture. This updated model will focus on improving the expectations, process, structure, training, and overall health of the Transitional Ministry model. The purpose is to modernize Mead's original breakthrough findings that harness the power of positive change during pastor transitions, while at the same time moving the Transitional Model away from a technical problem-based approach and more toward Ron Heifetz's adaptive challenges-based mindset. Unlike other partial solutions, the Transitional Ministry 2.0 approach is holistic, addressing a combination of issues with a unified solution.

While focusing specifically on churches and presbyteries of the PCUSA within the Pacific Northwest, these recommendations for the retooling of the Transitional Ministry model will set better expectations, more accurate pastoral placements, and

garner healthier and more consistent transitional results nationwide. The artifact will provide a presentation that shares the potential behind the Transitional Ministry 2.0 model, as well as critical steps for implementation within regional Presbyteries.

## CHAPTER 1: THE PROBLEM

*Isn't it funny how day by day nothing changes, but when you look back,  
everything is different?*

-C.S. Lewis, *Prince Caspian*

### **The Story**

The Senior Pastor of First Presbyterian Church announced their retirement, and the Session is now meeting with members of the Presbytery to discuss the upcoming leadership transition. In the past, this type of transition was fairly straightforward: the church brings in a trained transitional (interim) pastor who leads the congregation for 12-24 months while a Pastor Nominating Committee (PNC) conducts a nationwide search for their next pastor. Over the course of this meeting, the Session admits their church has been in a continued state of slow decline, that they are beginning to face new ministry and budget challenges, and that something needs to change.

“Ten years ago, when our last pastor arrived, we had over 1,000 members, three worship services, a staff of 20, and over a million dollars in the bank,” the finance elder shared candidly. “Now, we barely have 200 showing up regularly for worship, we are doing more memorials than baptisms, and we’re not sure how much longer we can keep the staff that we do have. Never mind the fact our building maintenance needs could wipe out our remaining reserves.” The other church elders nodded while shifting uncomfortably in their chairs: they are facing new ministry and budget challenges and know that something needs to change. The long-time missions elder then asked, “Is there a transitional pastor who could help us with our current situation?”

The Presbytery Executive's mind raced for a good answer while also sharing candidly about some of the current challenges the Presbytery has had finding qualified transitional pastors who could help with their needs. The Executive promises to spread the search net as far and wide as possible, inquiring of other regional executives to see if a well-experienced transitional pastor might be coming available and could help First Presbyterian through their current situation. Quietly though, the Executive realizes that what used to be a straightforward transition process no longer is so.

### **Transitional Ministry Finds Itself in Transition**

For the last four decades, the role of the transitional (formerly termed “interim”) pastor has been a mainstay for Presbyterian churches across America who find themselves in a pastoral leadership transition. When a pastor announced their departure or retirement from a local church, the process began for locating and identifying a transitional pastor who would take over in this unique leadership role before the long process of identifying a new permanent pastor could begin. This process was expected and even planned for, with many Presbyteries retaining a list of qualified transitional ministers who could be called upon when needed. In some cases, these transitional pastors felt a calling to this specialized ministry and would serve in these roles, moving from church to church for years and even as a ministry career. In other cases, Presbyteries might have one or two “go-to” transitional pastors who would have specific training or experience in helping churches work through significant, even existential, issues.

During this past decade, there has arisen a new problem for many regional PCUSA Presbyteries in the Pacific Northwest. On the surface, there has been an issue of supply and demand: a decline in the number of trained transitional pastors and a sharp

rise in the number of churches facing significant foundational or even existential issues. These issues are only symptomatic, though, of the real problem. The true problem is that some of the foundational principles on which the Interim/Transitional ministry model was originally based are becoming increasingly irrelevant, and a shift in both perspective and practice is needed. In short: The Transitional Ministry model is in its own time of transition. My proposal is “Transitional Ministry 2.0”: a retooling of the Transitional Ministry model, from methodology and purpose to training and position types, all of which will help equip pastors and presbyteries to deal with the adaptive challenges that churches need to be successful in today’s culture.

### **Historical Context**

Before the title of “transitional pastor” began to be used during the 2010s, the title had been historically known as “interim pastor.” The term “interim pastor” was first introduced in 1975 during a presentation made by the Rev. Loren Mead,<sup>3</sup> who is considered the father of Interim Ministry. However, as Mead points out, the role and use of the interim pastor had pre-dated this in a much simpler form. Every church goes through a period of transition and change when a pastor departs from their service with a local congregation (typically to take a new call, retire, is asked to leave, or passes away). Mead notes that before this terminology and specialized use were more clearly defined, the “interim” period between pastors was simply referred to as a “vacancy.”<sup>4</sup> Typically during a vacancy, the church, regional denominational government, or some combination

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<sup>3</sup> Molly Dale Smith, ed., *Transitional Ministry: A Time of Opportunity* (New York: Church Pub., 2009), iv.

<sup>4</sup> Ibid, v-vi.

of both, would take steps to fill the “vacancy” with a newly installed pastor. Mead observed that this was characteristically an anxious time, with congregations harboring a sense of urgency to fill the “vacant” role. Then, depending on the mainline church government structure, denominational executives would move to promote associate pastors or place available or retired pastors into the vacant pulpits until a new permanent pastor could be called by their congregation or placed by the executive.

Between 1967 and 1973, Mead worked on a research program with the Episcopal Church on organizational development as they were looking for ways to transfer a new methodology being used in corporations, academics, and government into the work of the church. The idea was to train and deploy “change agents to help local congregations become more effective and fruitful in their work.”<sup>5</sup> It was during this time that Mead was introduced to a Presbyterian pastor by the name of Rev. Keith Irwin, who seemed to have a deep understanding of how to apply those skills with a church that was dealing with issues after a troubling departure of their previous pastor. Irwin’s work as a “supply pastor” during an extended vacancy helped Mead begin to see the potential of significant positive change for a congregation during the time of transition between permanent pastors.

In 1974, Mead founded the Alban Institute with the purpose of “pioneering new ways of enabling congregational leaders to be agents of grace and transformation that could shape and heal the world.”<sup>6</sup> Mead’s first work was to focus on the potential of congregational development for churches that were in pastoral transition, which he

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<sup>5</sup> Ibid, vi.

<sup>6</sup> “About Alban,” Alban at Duke Divinity School, accessed April 24, 2019, <https://alban.org/about-alban/history/>.

originally termed “in-between time.”<sup>7</sup> In his research, Mead discovered this transitional period was actually one of the most fertile times for congregational development and that this “in-between time” afforded a unique opportunity to promote and implement the positive changes he had been researching previously.<sup>8</sup>

### **From Methodology to Working Model**

It was after this discovery that Mead points out the monumental moment in the history of interim ministry:

I managed to put together an exploratory conference of experienced pastors who were already working on “interims,” “vacancy ministries,” “locum tenens” placements, and “supply ministries.” Keith Irwin was one of those whom we invited to the meeting. The common element was that they saw this transition moment not as a problem, but as a moment to extraordinary potential—potential both for sorting out and cleaning up problems from the pastor, and also clearing the way for a new pastoral appointment.<sup>9</sup>

It was shortly after this meeting that the term “Interim Pastor” was born and Mead presented his first paper on it: “The Interim Pastor: A Neglected Role in Parish Development.”<sup>10</sup> Mead and others with the Alban Institute then began work on further defining the role and tasks particular to the Interim Pastor, eventually creating the first

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<sup>7</sup> Norman B. Bendroth, “Rethinking Transitional Ministry,” *Congregations* 39, no. 1 (2012): 22.

<sup>8</sup> Loren B. Mead, *A Change of Pastors...and How it Affects Change in the Congregation*, (Herndon, VA.: Alban Institute, 2005): x.

<sup>9</sup> Smith, viii.

<sup>10</sup> Loren Mead, “The Interim Pastor: A Neglected Role in Parish Development.” (paper presented at the Alban Institute, Bethesda, MD, 1976).



list of process steps and developmental tasks,<sup>11,12</sup> which, after later refinements, became known as the Five Developmental Tasks of Interim Ministry,<sup>13</sup> considered by many to be the backbone of what became the original interim/transitional ministry model.<sup>14</sup>

In June of 1981, the Interim Ministry Network (IMN) was spun off of the Alban Institute, founded by denominational executives and ministers from the Episcopal Church, the United Methodist Church, The United Church of Christ, and the Presbyterian Church US (later to become the PCUSA).<sup>15</sup> What began as an effort for mainline denominations to collaborate together in setting the expectations and training for interim ministry has now grown to more than 1,200 clergy members from over 25 different denominations.<sup>16</sup> While the PCUSA would later create its own interim training and network consortium,<sup>17</sup> it was this original network that helped the PCUSA officially

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<sup>11</sup> Norman B. Bendroth, ed., *Transitional Ministry Today: Successful Strategies for Churches and Pastors* (Lanham, MD: Rowman & Littlefield, 2015), 4-5; Bendroth, “Rethinking Transitional Ministry,” 22.

<sup>12</sup> These items showed up in Mead’s first book on pastoral transition, *Changing Pastoral Leadership*, originally published in 1976 by the Alban Institute but now out of print and unavailable. The final edition to his original book is titled *A Change of Pastors...and How it Affects Change in the Congregation* (Lanham, MD: Rowan & Littlefield, 2014.)

<sup>13</sup> Roger Nicholson, *Temporary Shepherds: A Congregational Handbook for Interim Ministry* (Bethesda, MD: Alban Institute, 1998), 6-12. The Five Developmental Tasks as outlined by Nicholson are: 1) Coming to terms with history, 2) Discovering a new identity, 3) Leadership changes during an interim, 4) Renewing denominational linkage, and 5) Commitment to new directions in ministry.

<sup>14</sup> Bendroth, “Rethinking Transitional Ministry,” 22.

<sup>15</sup> Bendroth, *Transitional Ministry Today*, 5.

<sup>16</sup> “About IMN,” Interim Ministry Network, accessed April 25, 2019, <https://imnedu.org/about-imn/>.

<sup>17</sup> Interim Ministry Education Consortium, rebranded as the Transitional Ministry Education Consortium in 2017. “Home Page,” Transitional Ministry Education Consortium of the PCUSA, accessed April 25, 2019, <https://www.transitionalministryeducation.net/>.

recognize the role of the Interim Pastor and began to see regular use of the Interim Pastor after the 1983 denominational merger.<sup>18</sup>

Over the next two decades, the use of interim ministry became standardized within many mainline denominations, including the PCUSA, with the focus to assist congregations in pastoral transition through specific tasks that would help strengthen the identity and purpose of the local church while preparing it for its future leadership.<sup>19</sup> By the late 1980s, the placement of an available interim pastor to a congregation in pastoral transition had become commonplace in most Presbyteries. This was primarily done under the assumption these congregations were healthy and the normal period of time between installed pastors was adequate to complete the expected interim tasks.<sup>20</sup>

The process had been fairly straightforward within the PCUSA for some time, with occasional variances based on the standard operating procedures of each individual presbytery. My home presbytery, The Presbytery of the Cascades, based in Portland, Oregon, has been following the typical process as laid out in their *Commission on Ministry (COM) Manual*. When a pastoral vacancy is announced (either through departure, retirement, promotion/demotion, or death), the COM works directly with the Session to assess and meet any immediate needs, followed by an informal assessment and determination of the transition type, which “may include an interim pastor.”<sup>21</sup> In most

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<sup>18</sup> Alan G. Gripe, *The Interim Pastor's Manual*, rev. ed. (Louisville, KY.: Geneva Press, 1997), vii-viii, 5-6.

<sup>19</sup> Nicholson, 6.

<sup>20</sup> Aleida Jernigan, interview by author, Vancouver, WA, February 28, 2019; Scott Lumsden, interview by video conference with author, Seattle, WA, April 8, 2019.

<sup>21</sup> *Commission on Ministry Manual of Operations* (Portland, OR: Presbytery of the Cascades, 2017), 74.

cases, an interim pastor is the most straightforward approach, given that the congregation does not have any major issues or conflicts requiring the assistance of a specialized pastor or greater involvement of the COM.<sup>22</sup> The Rev. Aleida Jernigan, recently retired Executive Presbyterian of our presbytery, estimated that up to five years ago, over three-quarters of all pastoral vacancies that could be filled were done so by an interim pastor.<sup>23</sup>

### **40 Years Later, a New Dynamic**

While the 1980s, 1990s, and 2000s saw the establishment and regular use of the Interim Pastor during most transitions in pastoral leadership in the PCUSA, the 2010s proved to be a decade of change nationally across the mainline denominations. Before the past decade, publications regarding interim ministry were limited with most reiterating Mead's original process steps and developmental tasks while adding to the conversation with the addition of practical applications and real ministry examples.<sup>24</sup> Then in the last decade or so, the greatest number of books to date regarding interim ministry were released, each showing a growing awareness of the changes in American culture and community, changes in the institutional context of the local church, and how to help increase awareness of each within the church.<sup>25</sup> From some of these same authors came

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<sup>22</sup> Brian Heron, interview by author, Portland, OR, February 14, 2019.

<sup>23</sup> Jernigan. February 28, 2019.

<sup>24</sup> Most notable among this collection include Gripe's *The Interim Pastor's Manual* and Nicholson's *Temporary Shepherds*.

<sup>25</sup> Recent books include Bendroth, *Transitional Ministry Today*; Smith, *Transitional Ministry: A Time of Opportunity*; Anthony B. Robinson, *Transforming Congregational Culture* (Grand Rapids, MI.: W.B. Eerdmans Pub. Co., 2003); Russell J. Crabtree, *Transition Apparitions: Why Much of What We Know About Pastoral Transitions is Wrong* (Westerville, OH: Holy Cow! Publishing, 2015); among others already cited previously.

the suggested re-branding of Interim Ministry to “Transitional Ministry” and the recommendation to use the title “Transitional Pastor” instead of Interim. Others, like the Rev. Dr. Richard P. Zimmerman, have latched on to the power of storytelling as a way to help transitional pastors and congregational leaders connect their time of leadership transition to similar stories of God’s involvement in leadership transitions in the Scriptures.<sup>26</sup>

Through this wave of new writing have come points of reflection, critical analysis, and even contrarian viewpoints regarding recent experiences being observed in the field of interim/transitional ministry. Some of the stalwarts of transitional ministry, such as Norman Bendroth, have noted the “existing models have served the mainline church well for three decades, but it is clear that new models and methods need to be explored.”<sup>27</sup> Others have noted that factors, once rare but now more commonplace, are having a more practical impact on the church’s immediate future. Still others have observed the rise of many practical issues in local congregations, including budget and income issues, aging buildings, unresolved conflict, political polarization, and a missing sense of purpose.<sup>28</sup>

While these conversations are important to the understanding of Transitional Ministry and its continued impact on churches in pastoral transition nationally, the purpose of my initial research was to focus specifically on the denominational impacts locally in the Pacific Northwest. Since there was no written research to provide insights

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<sup>26</sup> Richard P. Zimmerman, *Walk with Me to Another Land* (Eugene, OR: Wipf & Stock, 2017).

<sup>27</sup> Bendroth, “Rethinking Transitional Ministry,” 22.

<sup>28</sup> Heidi Husted Armstrong, “The Job of Transitional Ministry,” *The Presbyterian Outlook* (October 6, 2017): 2, <http://pres-outlook.org/2017/10/job-transitional-ministry/>.

into the particular issues contributing to this decline in our region, I identified a pool of stakeholders who have varied experiences regarding transitional ministry. They carry a maximum knowledge base of transitional ministry in our regional context, with many being directly involved in the teaching, training, or critical analysis of this area in our denomination. These individuals included current and previous interim ministers, current presbytery executives, current and previous denominational interim training faculty, and one recent author from my academic research pool. In many cases, each of these stakeholders held two or more of these designations, adding to the richness of the interviews and research while giving me the best chance at clearly identifying specific factors affecting transitional ministry in our region. While some of the specific factors highlighting our regional issues are unique in context to the Pacific Northwest region, others have more widespread origin whose influence has been felt in our region nonetheless.

### **Identifying Regional Transitional Ministry Issues**

While my research identified a long list of potential issues affecting Transitional Ministry in our region, many of these fell into three categorical areas, some of which had already been noted by others nationally. These three areas are overall church health, denominational transitional ministry training and networking, and lastly, issues affecting transitional pastors, including dwindling availability, needs, as well as proper care and benefits typically only afforded to installed pastors.

*Regional Factor #1: Overall Church Health*

One of the most glaring results to come from the stakeholder interviews was the fact that when a time of pastoral transition arrived for a local congregation, fewer churches were being deemed healthy enough to be granted a traditional transitional pastor. In many cases, this increase in the unhealthy churches came as a surprise, while in reality, many of the warning signs could have been identified long in advance. Unfortunately, in the majority of presbyteries in the PCUSA, there is no standardized church assessment tool in use that could help identify these issues during previous times of pastoral transition, leaving overworked presbytery executives and COM volunteers blindsided at times.

Regardless of the circumstances, regional executives involved in this research noted that while the number of churches in transition hadn't changed significantly, the number of churches deemed healthy enough to proceed with a traditional transitional pastorate had declined. One executive noted that just in the last couple of years, about half of their churches entering into pastoral transitions were deemed not healthy enough for a traditional transitional pastorate, forcing the Presbytery and the COM to look at alternate methods for providing short-term pastoral leadership. A primary example was the greater use of supply pastors, who would in many cases require specialized experience to be able to fill the temporary role for a longer period of time than that of the traditional interim pastor.<sup>29</sup> This was in direct contrast to the fact that over the previous

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<sup>29</sup> The placement of a supply pastor typically means the delay or suppression of the search process for a new permanent pastor.

three decades, it was typically only with the rare exception that congregations in their presbytery would not be granted an interim pastorate during their transition period.

*Regional Factor #2: Denominational Transitional Training and Networking*

The PCUSA Transitional Ministry Education Consortium (TMEC) (previously known as the Interim Ministry Education Consortium, or IMEC) is the principal vehicle for training transitional pastors in our denomination, with a focus extensively on following the “Five Tasks of Interim Ministry” in their most updated form.<sup>30</sup> For those considering working as a transitional pastor, the PCUSA encouraged (and in some cases, presbyteries required) participation in the denomination’s TMEC training<sup>31</sup> or equivalent provided by the IMN.<sup>32</sup>

Among current regional transitional pastors whom I spoke to within my research, all found this training lacking in comparison to their actual experiences as a transitional pastor. Among some of the specific examples given was the lack of training regarding recognizing cultural shifts, and how to help guide a church toward greater awareness and action. They also noted that the Five Developmental Tasks, considered the foundational and essential work of Transitional Ministry, failed to address many of the modern challenges facing the churches they served. Another issue was the lack of resources to assist transitional pastors in their work, specifically in the curriculum for leading a

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<sup>30</sup> Nicholson, 6-12.

<sup>31</sup> The Interim/Transitional Ministry training is broken into two, one-week courses, typically spaced by one year of interim/transitional ministry work. Training classes are made available around the nation by TMEC. “Curriculum,” Transitional Ministry Education Consortium of the PCUSA, accessed April 25, 2019, <https://www.transitionalministryeducation.net/curriculum>.

<sup>32</sup> “About Our Training,” Interim Ministry Network, accessed April 25, 2019, [https://imnedu.org/interim\\_transitonal-education/](https://imnedu.org/interim_transitonal-education/).

mission study (as required by our denomination), as well as resources providing critical demographics and trends for the communities where the local church is located or draws from. Lastly, many noted the absence of a transitional pastors' network, where those either participating in, or having finished the training, could connect with other transitional pastors to talk through their experiences and problem-solve issues as a group.

Among the denominational executives, there were similar issues noted regarding the denominational transitional ministry training. Similar criticism was cited regarding a lack of updates to the curriculum and training to address current church issues, as well as affirmation of the lack of resources to assist these churches and transitional pastors (most notably the lack of a relevant mission study curriculum). They also referenced a lack of national denominational leadership in this area, which in turn has made it increasingly difficult for executives to network and identify potential transitional pastors outside of their particular presbyteries or geographical regions.

### *Regional Factor #3: Issues Affecting Transitional Pastors*

The third regional factor was issues specifically regarding the transitional pastors, including dwindling availability, needs, and overall health. First is the decreasing number of pastors with relevant interim/transitional ministry training. A primary cause of this was the downsizing and eventual short hiatus of the IMEC after the retirements or departures of many key faculty in the mid-2010s. The recently relaunched and rebranded TMEC has some new staff and faculty, but is faced with a much smaller offering of trainings, with the greatest concentration residing on the east coast. This has a direct impact on the availability of Transitional Ministry training, especially for those in the Pacific Northwest.



The second part has been the number of transitional pastors willing to be available for calls. In many cases, some presbytery executives noted that transitional pastors are becoming more reluctant to relocate due to economic or family issues, with a growing inclination to limit their availability to metropolitan areas in which they already reside. At the same time, many of these transitional pastors prefer full-time employment with benefits, which helps provide a much-needed financial cushion should they find themselves unemployed between transitional calls. While this tends not to be as much of an issue for mid-to-large urban and suburban churches that have the size and finances to support a transitional pastor, it is proving to be more difficult for denominational execs to find transitional pastors who are willing to take part-time positions or accept calls to churches outside of major city centers that may require them to move or incur higher expenses in order to commute. Interviewees also noted the higher cost of living and real estate or rental costs had been a factor in decisions to stay put in a particular region.

Lastly, with many of the current and previous transitional colleagues that I've worked with or interviewed, was expression of a general frustration of their positions being regarded as "a second-class pastor." In many cases, when interviewing for a transitional pastorate position, these colleagues would recall similar accounts of churches trying to negotiate a lower salary than they were paying their previous installed pastor or to cut back on benefits and reimbursable accounts. This was typically done in an opportunistic effort to save money, since many presbyteries don't specifically require the same levels of salary or minimum benefits for transitional pastors.

Another factor has been the lack of adequate time off or sabbatical. In one regional example, a transitional pastor had worked in eight consecutive transitional calls,

and in most cases, had to move directly from one church to the next without any time off, including in three of those instances being asked to overlap service to multiple churches of at least a month or more. This was in response to the urgent demand for their specialized services. In yet another regional example, I spoke with three colleagues who have worked in transitional ministry (each for over ten years) and, like myself, have never been offered or have been able to take a paid sabbatical. Additional issues of frustration include a seeming unwillingness to recognize and nominate transitional pastors for presbytery leadership positions, as well as examples of being excluded from consideration or recommendation for future local church transitional positions for political or theological reasons.

### **Ron Heifetz: Technical Problems vs. Adaptive Challenges**

One item in particular from my initial research findings gained my attention and, in turn, sparked additional consideration which now demands further unpacking. Many engaged in the regional work of transitional ministry have noted a growing disconnect between the Five Developmental Tasks (FDT) and the actual challenges facing many churches today. The denominational training still promotes the FDT as the key work required of transitional pastors. In many presbyteries, the reporting and filing requirements expected of transitional pastors regarding the progress of the churches they are serving use the FDT as the principal framework for those reports.

One of the specific examples raised was the unique task facing many transitional pastors of recognizing specific cultural shifts occurring in a local community, and then the skills needed to help guide the lay leadership toward greater awareness and eventual positive future action. Another example was the necessity of determining specific factors

that have caused a congregation to slowly decline over a longer period of time. In many cases, there is a complex set of issues involved, and the approach of the FDT does not provide the best foundation in which to identify or address those issues.

I was first introduced to Ron Heifetz's theory on adaptive challenges in my seminary course on Emotional Intelligence, taught by Dr. Jules Glanzer, and have since utilized his approach in both ministry and civic leadership settings. The key to unlocking the power behind his theory is to understand the difference between technical problems and adaptive challenges, and then congruently, to understand the difference between technical and adaptive solutions.

Technical problems tend to be more easily identifiable, have fairly straightforward solutions, and can be quickly solved or implemented under the authority of an expert. Adaptive challenges, on the other hand, tend to be more ambiguous, complex, and difficult to identify or pinpoint, requiring time to inquire and study, all while resisting easily identifiable solutions. Technical solutions are typically easy to identify and deploy, and when applied to technical problems, tend to bring measurable success. Adaptive solutions generally require a commitment of time and energy to research and understand, followed by experimentation and adaptation, as well as a new way of seeing and doing things in the future.<sup>33,34</sup>

Technical problems, while often challenging, can be solved by applying existing know-how and the organization's current problem-solving processes. Adaptive problems resist these kinds of solutions because they require individuals throughout the organization to alter their ways; as the people themselves are the problem, the solution lies with them. Responding to an adaptive challenge with a technical fix

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<sup>33</sup> Ronald A. Heifetz, *Leadership Without Easy Answers* (Cambridge, MA.: Belknap Press of Harvard University Press, 1994), 73-76.

<sup>34</sup> Ronald Heifetz and Marty Linsky, "A Survival Guide for Leaders," *Harvard Business Review* (June 2002), <https://hbr.org/2002/06/a-survival-guide-for-leaders>.

may have some short-term appeal. But to make real progress, sooner or later those who lead must ask themselves and the people in the organization to face a set of deeper issues—and to accept a solution that may require turning part or all of the organization upside down.<sup>35</sup>

Consider this real-life example: I was working as a transitional pastor with a Session that was wrestling with declining attendance for their Christmas Eve service. There were a number of ideas thrown around as to why their 11pm candlelight service, which had been their single most attended service of the year for decades, was last year barely at half capacity. “We don’t have as many people from the community attending like we used to. We just need to send out more postcards to let people know we are here.” Other technical solutions were offered before I suggested this may actually be an adaptive challenge and recommended further research and considerations. The reality was the wider community was seeing a shift toward young families and a change in family traditions for Christmas Eve celebrations, so the 11p.m. candlelight service, while previously successful, was not what the community was looking for. After some additional research and brainstorming, a suggestion to experiment with an additional 5p.m. “Family Christmas Service” was eventually presented and agreed to at a subsequent meeting. This new service was met with a tremendous response that brought a “packed house” in its first year and has now become the most popular Christmas Eve service the church offers each year.

Treating adaptive challenges with technical solutions can bring momentary peace of mind something is being done to address the problem.<sup>36</sup> In reality, those mismatched

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<sup>35</sup> Ibid.

<sup>36</sup> Ibid.

technical solutions will undercut an opportunity to wrestle with the adaptive problem, delaying its discovery and potential for future success. The implications of Heifetz's theory on the FDT are significant. The FDT is a set of technical tools used to fix what used to be a technical issue: a healthy church in a time of pastoral transition.<sup>37</sup> Now, with so many churches wrestling with any number of adaptive challenges threatening their missions, visions, and even their futures, the continued expectation of the FDT as the foundational tool for transitional ministry not only stifles important and necessary conversations, it could even stifle the congregation's window of opportunity for future success or even future existence.

### **A New Methodology**

There was a time when most churches were foundationally healthy, and so during times of transition, the technical solutions-based approach of the FDT was a straightforward and effective framework in which to guide these congregations through their time of pastoral transition. Unfortunately, for the last decade or more, the vast majority of PCUSA churches have found themselves in a state of continued decline without a clear sense of why. Heifetz's model would clearly point to this as an adaptive challenge that should not attempt to be solved through technical solutions.

Adaptive leadership must become the new methodology for transitional ministry. Adaptive leadership has a completely different approach, in that instead of decreeing authoritative and technical mandates for action, a leader instead engages the invested

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<sup>37</sup> A discussion of this topic will come in Chapter Three in the sub-section, "What is Considered a Healthy Church?"

group with shared responsibility and continuous learning, all while providing a safe space for honest reflection, difficult conversations, rethinking values and norms, and soliciting experimental ideas. This is a completely different approach to transitional ministry leadership, and it shifts the role of the Transitional Pastor from simply helping a congregation through the necessary steps of locating their next permanent pastor to being more of a facilitator who is helping a congregation recognize their true state of health, the challenges that may be before them, and then instilling within them a sense of courage and ownership to face and even resolve the challenge(s) before them.

In my “Week One” interim training through the IMEC, we were shown a list of potential issues one might encounter as a transitional pastor, and then each issue was affiliated with its placement of when or where to handle that potential issue in alignment with the FDT. Thus, the original transitional ministry framework of the FDT was like continuing to try and pound a square peg into a round hole.



*Figure 1 — Square Peg, Round Hole<sup>38</sup>*

Mead’s original premise was that churches facing transitions in leadership are most open to considering positive change and engaging with a fresh vision for their future. In order

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<sup>38</sup> Artist Unknown. *Square Peg, Round Hole*. 2018, JPEG image. Medium.com, accessed November 16, 2020. [https://miro.medium.com/max/822/1\\*WHPN1U0YitiTuWO9wrmaeg.jpeg](https://miro.medium.com/max/822/1*WHPN1U0YitiTuWO9wrmaeg.jpeg).

for Mead's Transitional Ministry model to continue to be that source of positive change when churches are most open to it, then a new methodology that shifts away from technical solutions and toward adaptive tools is critical.

Peter Steinke was the first transitional ministry practitioner and author whom I observed embraced more of this adaptive methodology and attempted to introduce this approach into the IMEC training within the last decade. During my "Week Two" interim training,<sup>39</sup> Steinke was candid about some of the modern difficulties of the FDT and instead shared with us his different approach to dealing with some of the more adaptive challenges he was seeing in churches. Based on his book, *A Door Set Open*, Steinke painted a picture of a transitional pastor who was less of a train conductor and more of an adventure guide. Where instead of the transitional pastor working on completing a punch list of transitional technical items in a given amount of time, they were instead leading a congregation and their lay leaders on a journey that, over time, would yield three specific results: Awareness, Direction, and Adventure.<sup>40</sup>

Steinke further clarified his approach by tying similarities of the role of the Transitional Pastor to that of a tour guide. He argued that when one pays for a guided tour, they expect the tour guide to know where to lead and at which places to stop so as to point out and explain items of importance. Without the knowledge and training of the tour guide, one could drive through a location missing many of the important places and

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<sup>39</sup> My "Week Two" interim training was exactly one year after my "Week One" training, and was made up of eight "seasoned" transitional pastors, including myself.

<sup>40</sup> Peter Steinke, "Week Two Interim Training: A Door Set Open with Peter Steinke" (lecture, Austin Seminary, Austin, TX, March 13, 2014).

relics that not only reveal the history of the community but also help point to its future endeavors.

One of the biggest hurdles to this approach, though, is how does one move a congregation to a sense of adventure and discovery within its own community? For example, I have lived in the Portland, Oregon metro area for over 25 years, and while I've seen more and more tour buses and groups traversing the streets of our city in recent years, I have never once considered taking a guided tour of Portland myself. Why should I, since this has been my city for almost three decades? Jay Anderson, a colleague and friend from our D.MIN cohort, experienced what it was like to go from being a long-time Portland area resident to becoming an actual tour guide when he accepted just such a position during a break from ministry. While in his tour training and ride-a-longs with other tour guides, he was amazed at the number of new discoveries, details, and stories he learned. "At first, the city seemed intimidating, even though I was familiar with it," he recalled, but then, after those trainings, "Portland came alive for me, and the city literally became three-dimensional and in full color to me."<sup>41</sup> Part of the adaptive challenge with any church is for the transitional pastor to convince the lay leaders to explore a community in which they already feel comfortable and knowledgeable and to help them discover, with a fresh set of eyes, realities that come alive in three dimensions and full color.

It is a learned skill for a transitional pastor to become part of a new community and then play the role of the tour guide to help their congregation's lay leaders recognize recent changes and discover new truths about their own community. The transitional

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<sup>41</sup> Jay Anderson, interviewed by author, Lincoln City, OR, November 15, 2020.



pastor also must have the skill set to know how to lead an intentional, guided conversation, one that helps those same leaders properly process and analyze the new vantage point they have of their community. It is only through those guided conversations that a congregation's lay leaders can begin to recognize the opportunities for their future and then begin to problem-solve their own issues of stagnation or decline. These are the critical steps necessary before a clear new direction of vision can be cast for each church.

Adaptive challenges cannot be solved in a two-hour church board meeting. Adaptive challenges require time for discovery and analysis guided by discerning and specialized leadership with a willingness to ask hard questions that don't have easy answers. This approach takes time before that "ah-ha" moment comes to the group, and the future then begins to come into focus. In many cases, it can take six months to a year (or longer in some instances) before this process is completed, and a clear vision for the congregation's future can be crafted. Only after that vision for the future becomes clear can the transitional pastor then begin to exemplify the final trait of adventure in an effort to help those leaders embody and evangelize that new vision the Lord has in store for their church's future.

With so many regional (and national) PCUSA churches in a state of continued decline, these congregations could benefit significantly from an intentional period of reflection, discovery, and visioning through an adaptive transitional leadership model. Steinke's approach of awareness, direction, and adventure is one example of this adaptive approach to transitional ministry, but it requires a foundational understanding of Heifetz's principles in order to be effective. For transitional ministry to continue to be the most effective tool for leading churches toward positive change in a time when they are more

open and responsive, then the new methodology (and all subsequent modeling, training, and tools) must be firmly based in an adaptive challenges' foundation and framework.

### **What Won't Be Addressed**

Many of the solutions considered in chapters two and three, including my proposed Transitional Ministry 2.0 model, are solutions that have adopted elements of Heifetz's methodology in some aspect. Some of the solutions utilize a more adaptive approach for the analysis and problem-solving portions inside transitional ministry, some are specifically on proper training of the next generation of transitional pastors, and others on how to help a church envision and organize for a very different future. When it comes to the new Transitional Ministry 2.0 model, my approach is holistic, with the goal of creating a model embracing a healthy and adaptive approach to transitional ministry at every level.

Due to the constraints for this dissertation, I will not be able to explore the following important and related topics:

- The study of recent significant changes in American culture and their effects on the American church.
- Theological shifts within the PCUSA and their effects on regional churches, including a greater divergence from historically moderate positions.
- Role of Murray Bowen's Family System's Theory, and its critical understanding and use within the work of Transitional Ministry.
- Discussions of how to facilitate change and combat resistance to change within a local church.
- Specific adaptive tools that could be considered as part of transitional ministry training.
- The role of the "mission study" as part of the ethos of pastoral transitions within the PCUSA, and the glaring lack of a modern denominational curriculum for churches today.
- Short and long-term effects of untrained or unhealthy interim/transitional pastors on churches in transition.
- Redevelopment/Revitalization as its own specialized ministry.

Lastly, in order to properly reconfigure transitional ministry to a more adaptive model, a significant and strategic retooling of the transitional ministry training will be key. While I will address some of the major pieces needing to be considered in such a revamp of the training, this will require its own separate research project and dissertation.

### **Summary**

Mead's discovery of the potential of significant congregational development during times of pastoral leadership transition led to the founding of the Interim/Transitional Ministry we know today through the Interim Ministry Network, which remains in use throughout many American mainline Protestant denominations. This work led to the establishment of the role of the Transitional (formally Interim) Pastor in the PCUSA, and its nearly exclusive use in the majority of pastoral transitions for the denomination from the 1980s through today. The last 40 years have brought about a new dynamic, with more churches wrestling with significant adaptive challenges, and the original model based on the Five Developmental Tasks no longer proving sufficient in addressing those challenges. In short, Transitional Ministry has now found itself in transition.

Initial regional research pointed to three categorical factors affecting transitional ministry specifically in the Pacific Northwest: Overall church health, denominational transitional training and networking, and issues affecting transitional pastors. Based on the understanding of Heifetz's theory of Adaptive Leadership, it becomes clear the original Five Developmental Tasks are an outdated technical solution for what has become a current and widespread adaptive challenge facing regional PCUSA churches.

The future of Transitional Ministry needs to move toward a new methodology based on adaptive leadership, and in turn, adopt a new overall model based on that methodology.

## CHAPTER 2: OTHER PROPOSED SOLUTIONS

*What we've got here is failure to communicate...*

*-Captain, Cool Hand Luke*

I have lived in the Willamette Valley of Oregon now for over 25 years and have had the joy of watching an amazing wine industry blossom up and down the valley. As of 2020, there are now more than 600 wineries in a region that also boasts ten recognized appellations.<sup>42</sup> At four of the churches I've served, there were church members who were either vineyard owners or were involved in other elements of the industry (Christmas time was always a special treat with some wonderful local wines from these vineyards given as gifts). With the explosion of new vineyards has also come a great number of new outdoor venues, which have hosted everything from weddings and concerts to even special church services in these majestic amphitheaters singing of God's creative glory.<sup>43</sup>

I was at one such local vineyard for a friend's wedding rehearsal I was officiating in the Chehalem Mountains when I was chatting with the vineyard owner while we waited for the participants to arrive. While we were talking, we watched a red fox come trotting right through the event field where the chairs were all set up and the gazebo was in place, crossing to get to the vineyards on the other side. It was one of the rare times I had seen a fox out in the open, and I asked the owner if that was unique. "Unfortunately,

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<sup>42</sup> "Willamette Valley AVAs," Willamette Wines, last modified July 28, 2020, <https://willamettewines.com/about-the-valley/avas/>.

<sup>43</sup> For a unique look into the discussion of appellations and of the terroir of the Willamette Valley wine culture in light of reimagining ministry and kingdom culture in the Pacific Northwest, I encourage you to read Jay Anderson's dissertation titled: "A Taste of the Kingdom: Re-Imagining and Re-Articulating Kingdom Community."



metaphorical foxes are causing mischief, damaging and breaking some of the branches of once effective ministry or outreach, or even worse, chewing on the very roots of the local church and damaging the future health of that vital vine. Just as the local vineyard owners know they have to utilize multiple methods to identify and eradicate the foxes from their fields, so, too, have there been multiple approaches for attempting to fix the issues that are plaguing both the congregations and presbyteries of the Pacific Northwest, as well as Transitional Ministry itself.

Throughout the 2010s, there have been a number of attempts at eradicating these metaphorical foxes through the lens of transitional ministry, from a name change to the increased use of outside consultants, modifying the training curriculum, experimenting with pastoral types, and even suggesting the complete elimination of transitional ministry altogether. This chapter will seek to take a brief and critical look at some of the notable recent approaches.

### **Putting Lipstick on a Pig (What's in a Name)**

One of the hardest steps in wrestling with an adaptive challenge is identifying and putting a name to it. Interim pastors found themselves working with churches that were facing issues and systemic changes that ran much deeper than those typically associated with a permanent pastoral transition. It was during my previously mentioned IMEC training in Austin, Texas, in 2014, when we were discussing some of those deeper issues, that I first began to hear the term “transitional ministry” being used as an alternative to “interim ministry.” The trainers there gave us a quote from William Bridges that stated, “Transition is the psychological process people go through to come to terms with a new situation.” Being in transition means admitting the past normal is gone, and a “new

normal” needs to be determined. Thus, the rationale for the alternative name made sense: “Any type of major change that pushes a congregation into a time of transition from their previous normal to what will become their new normal...and the fact that not all church transitions involve a pastoral change.”<sup>45</sup> Because the term “interim ministry” had been used exclusively to indicate a transition time between permanent pastors, and in light of the fact that more of the issues were due to challenges facing not just the well-being but even the future existence of some struggling congregations, a change of terminology was needed to convey this new reality.

In my research for this dissertation, I was unable to determine an initial source of inspiration behind the name change from “interim” to “transitional ministry.” When asking other practitioners, trainers, and executives if they were aware of a source, many of them cited experiences like mine, where the term “transitional” began to be discussed within the circles of this specialized ministry but were unaware of the name change’s origination.<sup>46</sup> While for this work, there may be an absence of properly recognizing an initial source of inspiration behind the name change, it doesn’t alter the fact that the new terminology toward Transitional Ministry has begun taking over. This includes articles, books, and even dissertations exclusively utilizing the new terminology, as well as training organizations revising their names in order to conform.<sup>47</sup>

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<sup>45</sup> “Week Two Interim Training” (class notes from lecture, Austin Seminary, Austin, TX, March 11, 2014).

<sup>46</sup> In a discussion with one presbytery executive, they had suspected the original source of new terminology would trace back to Bendroth, but after an extensive look at Bendroth’s articles and books, I was unable to locate any such proposal. In fact, in multiple writings, Bendroth acknowledges the term “transitional ministry” already being in use without taking any credit for the new terminology himself.

<sup>47</sup> This includes the PCUSA rebranding of the IMEC to TMEC mentioned in chapter one.



The danger with name revisions comes in the expectations. For some, there is a sense that by changing their name, it will affect the future for the better. Some companies and organizations have spent millions of dollars with advertising consultants for the purpose of name changes or rebranding, often with mixed results.<sup>48</sup> I've watched churches who have done so with an expectation an "updated name" will then magically attract a younger demographic. Thus, a similar danger persists here. If the change of terminology is simply to help clarify and name an adaptive challenge facing this area of ministry, then the shift to "transitional ministry" accomplishes that task. But, on the other hand, if the expectation is the new terminology will somehow magically fix some of the deeper issues aforementioned, then the result of the name change will ultimately be like that of an old southern saying, "You can put lipstick on a pig, but in the end, it's still a pig."

### **Assessing the Landscape**

Early in my research, when I was interviewing some of the regional presbytery executives, I learned there had been many recent changes in determining the health of a local church when a pastoral transition is announced. Traditionally, an announcement of pastoral transition automatically signaled the need for an interim/transitional pastor and typically led to an immediate search process for said transitional pastor. Now, many of these regional executives perceived the need for some level of early church assessment to determine if the church was in a healthy enough position to go through a traditional

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<sup>48</sup> Examples include ValuJet changing to AirTran in 1997 after an airliner crash in the Florida Everglades the year before, Philip Morris to Altria in 2003 after losing a very public \$28 billion lawsuit the year before, and Comcast changing their name to Xfinity in 2010 after years of being named the worst company in America for customer service.

interim process. The reason for this was the fact that in recent years, a greater number of churches were present that had underlying issues needing to be addressed during a transitional period. In a majority of these cases, the church health issues have been linked to declining membership and budget constraints, a loss of purpose or vision, an inability to adapt to a changing community, or a need for conflict resolution, just to name a few.

The purpose of these early church assessments was two-fold: to identify some of these issues ahead of time and then, to make sure the right transitional pastor could be hired to work on them. In the past, this assessment was typically left to the transitional pastor to “uncover” *after* they were already in place and working with the church. The growing problem, though, was the fact that by the time some of the issues were uncovered, the transitional pastor may not have had enough time remaining to work with the Session to resolve them, or had the training or experience to deal with those particular issues. For these executives, the attempt to complete some sort of church health assessment early in the transition process allowed for the possibility of identifying some of the surface issues. Then a transitional pastor with the proper training or experience could be found and begin working immediately with the Session on relevant issues.

One of the challenges that became clear over time was the lack of a consistent approach or coordinated effort to these church health assessments. In some cases, they were just being done by a presbytery staff member (usually the executive) or by a COM volunteer and were typically subjective in nature, without any particular matrix or resource as a guide.

There was one exception to this that came out of Northwest Coast Presbytery. Dr. Corey Schlosser-Hall is a rare, non-clergy presbytery executive, has his Ph.D. in

Organizational Communications and is a self-described “systems guy” who loves to find ways to improve an organization. Schlosser-Hall took a different approach to tackle the need for early church assessments and helped create a new expectation within their Presbytery. Every church that finds itself in a time of transition goes through a brief church health assessment by a small team consisting of presbytery staff and COM members. While at the time of our interview their process was still more open and subjective with no specific matrix or outside resource being used, this team approach to collecting, reviewing, and analyzing the local church information was already proving helpful. Schlosser-Hall noted that when these early assessments picked up issues needing to be addressed, some of which could be critical for a church’s future survival, it allowed for a more honest conversation between the Session and potential transitional pastors of the work needing to be done, as well as helping set a more appropriate timeline for the work to be completed. It also provided their Presbytery with the necessary advance warning when a church was really struggling so they could instead consider an experienced stated supply pastor position to work through more significant issues over a longer period of time than that afforded in the current interim/transitional model.

The work of Schlosser-Hall and Northwest Coast Presbytery to set an expectation for all their churches in transition to go through an early church assessment is a step in the right direction. It is a critical piece of the puzzle in getting the Transitional Ministry model back into alignment with the current needs of local churches and regional presbyteries. Beginning every pastoral transition with a church assessment would not only help identify potential issues and determine overall church health, but would also aid in setting proper expectations for the church, the Presbytery, and an incoming transitional

pastor. The next steps would be to expand this expectation for multiple regional presbyteries (arguably, to set this expectation nationwide) and complement it with a refined and user-friendly matrix to allow for quick deployment and consistent results.

### **Feeling (En)titled (Changing Pastoral Types)**

In chapter one subheading “Identifying Regional Transitional Ministry Issues,” we explored the issue of the dwindling availability of transitional pastors. The opening story of this paper also dealt with this major issue facing many regional presbyteries. When a church finds itself in pastoral transition, there may be no transitional pastor available to take the call, either because of availability, geography, or the lack of a trained or experienced transitional pastor to handle the particular needs of that church. Some presbyteries have utilized the solution of changing the position type from interim/transitional to stated supply. While this change of pastoral type can allow for an agreeable solution in the short-term, it opens the door to a host of potential issues in the long-term.

The Stated Supply pastor is a temporary position similar to the transitional pastor, with two major differences: the temporary term is open-ended and specific training is not required. Unlike the transitional pastor position, which comes with a specific time period (typically from 12 months minimum to 36 months maximum) and with it, an expectation that the time of transition will eventually come to an end with the hiring of a permanent pastor, the stated supply position has no such maximum time period. The stated supply position can be renewed annually and indefinitely at the convenience of the church and the pastor, which can, in turn, dissolve a church’s sense of hope of future stability over time. In addition, a stated supply pastor can be hired, in most cases, without any specific

training for helping churches through transitional or even existential issues. This could be detrimental to a church that has significant issues that have yet to be properly identified, in addition to a lack of proper expectations being set to help resolve and move the church to a more healthy and viable position. In short, if the placement of a stated supply pastor is simply to fill a position with a pastor willing to take it, while it resolves a short-term vacancy issue, it could potentially rob the church of a productive transition as well as delay or terminate an eventual national pastor search for a more compatible fit.

I am not proposing the exclusion or elimination of the stated supply position. It is a vital temporary position and arguably a “secret weapon” for presbyteries to use in very specific and necessary occasions. I have served twice in stated supply positions as part of my transitional ministry career. Each time I walked into those positions it was because there was a lack of clarity for the future of that position in that church; the stated supply position allowed for the flexibility for me to do my work while helping each church also determine their critical needs before deciding on the future expectations of that pastoral role in a permanent form. Where the danger lies is when the stated supply position is utilized when a transitional pastor would actually be most appropriate, which in turn can lead to an increasing and potential overuse of the stated supply position to fill pastoral vacancies. While there are specific times and needs warranting the use of the stated supply pastor, it should not be considered as an alternative when there are underlying church health issues present requiring a more trained or experienced pastor to address, or when it is clear a permanent called pastor is still the future expectation for that church.

### **Jumping the Gun (Consultants Can Fix Anything)**

Presbyteries aren't the only organizations aware of the lack of availability of trained transitional pastors. Many churches are aware of this same issue, having heard or experienced first-hand the problems that can come from an extended vacancy or from having an untrained or inexperienced transitional pastor at the helm during a critical leadership change. This has driven some churches to undertake advance planning of known pastoral transitions (i.e., retirements) with the hiring of outside consultants. The purpose of hiring these outside consultants can be multi-faceted, but the primary result seems to be an effort to conduct their own church health assessment and pre-implement any needed changes before the pastoral transition. The reason for this move (which is gaining popularity in medium to large churches in the region) is with the hopes of being able to later petition the presbytery for the ability to bypass the traditional transitional period, and in turn, start the permanent pastoral search before the departure of the current pastor.<sup>49</sup>

The danger of this approach goes back to Mead's initial findings that the transitional period is one of the most fertile times for congregational development and a time when churches tend to be more open to visioning, new ideas, and change.<sup>50</sup> In contrast, when a church knows their long-time pastor is approaching retirement, anxiety begins to build with the expectation of change that will eventually come. I have watched

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<sup>49</sup> At the time of publication, I am personally aware of 13 regional churches (including some I've had connections with) who have used this approach in just the last five years. This trend is also growing in popularity in other parts of the denomination.

<sup>50</sup> Loren B. Mead, *A Change of Pastors: And How it Affects Change in the Congregation*, (Herndon, VA.: Alban Institute, 2005), x.

how in many of these cases, the congregation will actually resist changes or visioning during these sunset years of pastoral leadership in a natural effort to seek stability in the face of the eventual change. In contrast, consulting firms, by their very nature, validate their necessity by recommending changes in alignment with their philosophies or systematic approach.

While a good consultant or consulting organization can perform an accurate church health assessment and make recommendations for vision, new ideas for ministry, missional engagement and relevant organizational changes, the worst time to do this is ahead of an expected leadership change, especially during the sunset years of a long-term senior pastor. Unfortunately, I have witnessed the negative results of this circumstance play out multiple times, especially when Sessions work to implement a new vision and even significant changes ahead of the known leadership transition. The short-term consequences usually resemble resistance or rejection by a segment of the congregation, sometimes vocally, and other times with the choice of leaving the church they love. What is ironic is that most of these decisions to engage the use of a consultant in order to avoid the need for a traditional transitional period typically bring the opposite result. While the findings and recommendations of the consultant may be accurate and worthwhile, too often the implementation of the consultant's recommendations brings a significant change in a time when the congregation may actually be the most resistant to change. Unfortunately, I have watched this translate into an upheaval of emotions and overall instability right before the pastor's departure, thus turning what should be a time of celebration and closure into a cacophony of mixed emotions, making a time of transition and healing even more critical.

### **Training Partners (Modifying the Training)**

As mentioned previously, one of the key factors attributing to the regional decline of transitional pastors focuses on the current interim/transitional ministry training. The first was the sheer lack of west coast trainings in comparison to those offered in the Midwest and along the East Coast.<sup>51</sup> Second, there has been a longtime and widespread critique that the current interim/transitional training model is antiquated and no longer meets the current needs of churches. This meant that future transitional pastors were not always properly trained to tackle the new and complex challenges facing churches today, and in turn, regional presbyteries were lacking well trained and experienced transitional pastors. It was in response to both of these issues the Rev. Dr. Scott Lumsden, Executive Presbyterian of the Seattle Presbytery, decided it was time to do something about it.

Lumsden had already been an interim/transitional ministry trainer, teaching at multiple sites around the country, but had himself become disillusioned with the curriculum model. After taking his current role with Seattle Presbytery, he was approached a few years ago by the director of Menucha Retreat Center outside of Portland, Oregon, and asked if he would be willing to lead a regional training. The opportunity to bring a much-needed training back to the local region was intriguing, but it conflicted with his disillusionment. Scott threw out a key stipulation, “Only if I can change the (training) model.” And change it he did, with the assistance of the Rev. Eliana Maxim (now Co-Executive Presbyterian of Seattle Presbytery) and the Rev. Dr. Heidi Husted-Armstrong (veteran transitional pastor). This creative and experienced team from

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<sup>51</sup> In 2013, when the IMEC was still operating at full strength, there were twelve training opportunities offered nationally, with only one (Zephyr Point, NV) offered on the West Coast.



Seattle Presbytery now leads the “Transitional Ministry Workshop” at Menucha twice a year,<sup>52</sup> with a custom curriculum based less on traditional technical solutions and the Five Developmental Tasks and more on understanding the issues and challenges facing churches today, sprinkled with some of Heifetz’s tools for adaptive leadership. True to its core, no two training workshops are the same, as the team analyzes and makes changes to both the Week One and Two curricula regularly based on feedback from previous attendees as well as real-life situations from within their presbytery. (A comprehensive look and analysis of the Transitional Ministry Workshop I was invited to attend in October 2019, including a comparison of curriculum topics to a traditional IMEC training, can be found in Appendix B.)

The new Transitional Ministry Workshop created by Lumsden and the team from Seattle Presbytery is a huge step in the right direction when it comes to modifying the training to better align with modern transitional leadership needs. While I will dive into further detail of additional changes needed regarding transitional training overall, the denomination (and specifically the TMEC) need to study this new format and consider adopting similar changes in the curriculum nationally.

### **Eliminating Transitional Ministry Altogether**

With the continued decline of available transitional ministers and growing questions about its long-term effectiveness, a quiet conversation has grown among those in this area of specialized ministry, wondering if Transitional Ministry as we know it

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<sup>52</sup> Workshops have traditionally been offered in the spring and fall, although the workshops have now moved completely online during the COVID-19 pandemic, with the intention of resuming to in-person retreats again when it is safe to do so.

should simply be allowed to fade quietly into the night. This question has come up in more and more conversations recently with fellow colleagues, and the question has even been acknowledged by some of the major modern voices in our field.<sup>53</sup> At the surface has been a doubt of whether Transitional Ministry can even be reimagined and rebooted in such a way to recapture the level of impact it once had, especially in light of the ever-changing needs of churches today and the increasing number of churches now facing steady decline. Another argument raised has been the polarizing theological and political views that have pushed binary thinking to an extreme not seen before, making it more difficult for transitional pastors to remain neutral and gather all sides together collaboratively. Lastly, the voices of some, such as William Vanderbloemen, who trivialize this area of ministry when they say, “after all, every pastor is an interim pastor of some sort”<sup>54</sup> (while at the same time creating a successful business of pastoral succession that seemingly eliminates the need for a time of transition), have deflated some in our area of ministry.

“The purpose of an interim pastor is to assist a church between permanent pastors...while the purpose of a transitional pastor is to help guide a church through a time of change and vision for their next chapter.”<sup>55</sup> There was a time when the simple form of an interim pastor was one who filled a vacancy until the new permanent pastor could be found. When Mead was conducting his research, he did so with the

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<sup>53</sup> Anthony B. Robinson, “Rethinking Interim Ministry,” *Congregations* 39, no. 4 (2012), 15-16; Bendroth, “Rethinking Transitional Ministry,” 22.

<sup>54</sup> William Vanderbloemen and Warren Bird, *Next: Pastoral Succession That Works* (Grand Rapids, MI: Baker Books, 2014), 24.

<sup>55</sup> “Week Two Interim Training” (class notes from lecture, Austin Seminary, Austin, TX, March 11, 2014).

understanding that mainline churches in his day had a need for change at the organizational development level in order to set themselves up to thrive for the future, and it was by accident he discovered the time of pastoral transition as a “sweet spot” for implementing that level of change. If Mead’s findings are still relevant today, then a properly reimagined transitional ministry model that realigns its methodology and practice may address the modern existential challenges facing churches while continuing to capitalize on that “sweet spot” of openness to vision and change during a time of transition. In fact, it could be the greatest opportunity for revitalization for our denomination, both regionally and nationally. In contrast, allowing the dissolving of transitional ministry (either naturally or intentional) could mean a critically lost opportunity for churches, leaving entire communities without any mainline Protestant representation or missional engagement, and in turn, negating the entire purpose of the Great Commission.

### **Conclusion**

Just as the vineyard owner requires multiple simultaneous approaches to rid their vineyards of the destructive efforts of the foxes, a reimagined and modern approach to Transitional Ministry requires multiple simultaneous approaches in order to be successful today. In chapter three, I will introduce my thesis of the Transitional Ministry 2.0 model, which incorporates and expands on some of the solutions mentioned above, with a new foundation building on the methodology of adaptive leadership and a framework that provides much-needed improvements in structure, expectations, and overall health.

## CHAPTER 3:

### THESIS

*The measure of intelligence is the ability to change.*

-Albert Einstein

For the last four decades, the role of the Transitional Pastor has been a mainstay for Presbyterian churches across America who find themselves in pastoral leadership transition. The expectations have remained largely the same during this period: a transitional pastor comes to lead a local congregation through a specific and typically familiar process that will, in the end, culminate with the selection and nomination of their next pastor. I have noted, previously, for many regional presbyteries in the Pacific Northwest and beyond, the last decade has brought both a change in circumstances and, in turn, expectations. On the surface is the issue of supply and demand with a decline in the number of trained transitional pastors, juxtaposed to a sharp rise in the number of churches facing significant foundational or transitional issues. However, these issues are only symptomatic of the real problem; some of the foundational principles on which the Interim/Transitional Ministry model was initially based are no longer true, and a shift in both perspective and practice is needed. In short: the current Transitional Ministry model is in its own time of transition.

### **Reimagining Transitional Ministry**

As noted previously, Mead showed in his research the pastoral transitional period is actually one of the most fertile times for congregational development and affords a

unique opportunity to promote and implement positive changes.<sup>56</sup> The original purpose of setting aside a dedicated transitional time between permanent pastors was to take advantage of this fertile time to not only promote needed congregational development but also to help local congregations assess who they really are in light of changing communities and culture, as well as to determine their God-given vision for their next chapter of ministry. Instead, the transition time has, in many cases, been relegated to the status of a necessary evil required by the denomination, with a list of required tasks to be completed before the next permanent pastor can be called. If Mead's original premise still holds true today, then how do we recapture the power of the transitional period and reimagine the purpose of this critical time, not as a necessary evil but rather as a welcome time of reflection with expectations of significant results?

The purpose of major software revisions is to improve the functionality and usability of the software to match the changing needs of the user. Major version releases also send the signal of previous version incompatibility to meet current needs.<sup>57</sup> Essentially, as the world changes, so, too, do the needs of the user, and thus improved solutions are required. The same is now true for Transitional Ministry. The original model that Mead and the IMN masterfully created over 40 years ago has run its course. As the world has changed, so, too, have the needs of both the local churches and their governing bodies. The original version is becoming increasingly incompatible with current needs. It's time to introduce a major revision to the original program: Transitional Ministry 2.0.

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<sup>56</sup> Loren B. Mead, *A Change of Pastors: And How it Affects Change in the Congregation*, (Herndon, VA.: Alban Institute, 2005), x.

<sup>57</sup> See Appendix C: Software Development and Version Numbers for more information.

## **Transitional Ministry 2.0**

The purpose of the Transitional Ministry 2.0 model will be to continue Mead's notion of harnessing the power of the transition period as a reflective, creative, and formative chapter in a local church. This updated model comes with tools to help churches, pastors, and regional church government bodies deal with today's adaptive challenges. This creates a new culture that promotes clearer expectations and healthier working environments for what has been a very challenging type of specialized ministry. In referring back to eradicating the foxes in the metaphor of the vineyard from chapter two, just as a vineyard owner has to take multiple simultaneous approaches to stop the foxes from ruining the vineyard, this model attempts to make multiple simultaneous changes to address the health and preservation of the local churches, the transitional pastors, and the regional ecclesiastical leaders who assist in this work.

Just as major software revisions improve upon their original version, the Transitional Ministry 2.0 model seeks to do the same. To accomplish its purpose, the 2.0 model focuses on five major areas of improvement:

- Improving the expectations of the transitional period.
- Improving the overall process.
- Improving the structural framework for both churches and transitional pastoral positions.
- Improving the Transitional Ministry training.
- Improving the health and environment for current and future transitional pastors.

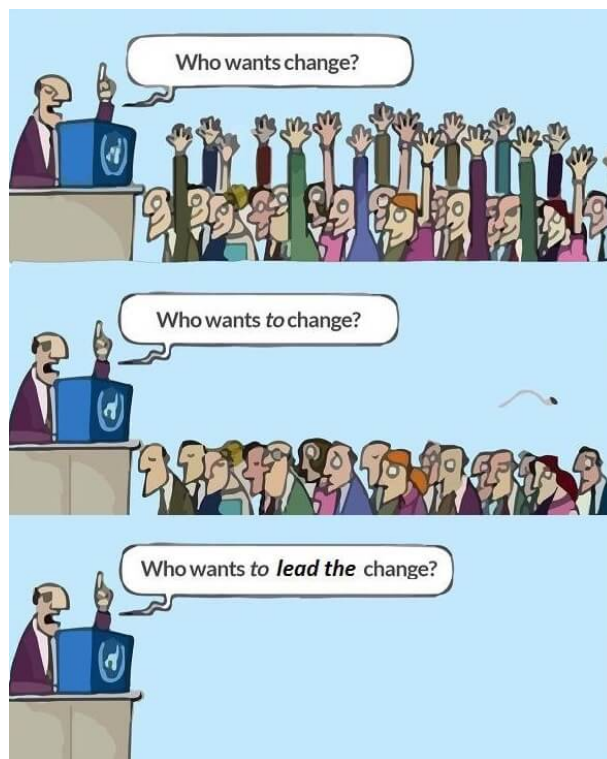


Figure 2 — “Who Wants Change” Comic<sup>58</sup>

It is important to note while I have focused on this model for the current PCUSA structure, I believe it can be easily adapted for other major denominational models as well. Just as the IMN spanned multiple mainline denominations and adapted Mead’s original model to work within various ecclesiastical systems,<sup>59</sup> the same can be true for the Transitional Ministry 2.0 model. In addition to mainline denominational adaptation, I also believe that independent churches, as well as independent transitional ministers, can adapt many of the components of this new model into their work. It will require a willingness to identify the need for change, a determination of the proper adaptations to

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<sup>58</sup> Artist Unknown. *Who Wants To Change*. Year Unknown. JPEG image. Torbenrick.eu, accessed July 14, 2020. <https://www.torbenrick.eu/blog/change-management/change-management-comic-strips/>.

<sup>59</sup> “About IMN,” Interim Ministry Network.

chart a clear course forward, and finally, to find leaders willing to champion a modified model into their ecclesiastical system.

### **Improve the Expectations (Changing the Metaphor)**

Nearly every church in the PCUSA has experienced having an interim/transitional pastor and, because the current transitional model has been in place for the last 40 years, it also brings with it a set of expectations that may no longer be true. For example, in each of the eight churches I have worked with through a pastoral transition, I am at some point asked the same question (in various forms): “How long until we will have our new pastor?” The answer from my current Presbytery has typically been “12-24 months,” but this type of response, in fact, reveals an incorrect expectation. A specific timeline answer gives the local church the expectation that their transition will be like all others.

The current model that has been in use for the last 40 years came with a simplistic assumption, which in turn, helped set some faulty expectations for regional Presbyteries and their local churches. The current model was based on the assumption that most churches were healthy at their core. Thus, the FDT were meant to help a local church make technical course corrections during a pastoral transition. Everything in the model, from training to position type, was based on this once correct assumption, and Presbyteries adopted a process throughout the denomination of this “one-size-fits-all” approach to pastoral vacancies: The Interim Pastor.

When I went to my first Interim Training, a metaphor was shared with us to help us understand the purpose of Transitional Ministry. “Your job is to help keep the train on



the tracks.”<sup>60</sup> This metaphor was very much in alignment with that foundational assumption that most churches were healthy at their core, and thus the primary job of the transitional pastor was to move into the engineer’s chair and make sure the “local church train” continued moving forward and successfully reached its next station, where it would pick up its new pastor/engineer. Then we would find the next church “train” that needed us to jump on and guide it into its next station.

The problem with this metaphor is it totally breaks down (pun intended) if the foundational assumption is no longer true. If we can no longer assume most churches are healthy at their core, then a new metaphor to help shape the time of pastoral transition becomes a necessity. I believe a more appropriate metaphor for a local church in leadership transition is that of a beautiful used car that is changing hands, and while the vehicle may look great on the outside, to never assume that everything is perfect “under the hood.” In many cases, the time in which a used car should be given an appropriate level of scrutiny and review is when it is changing hands, and the same should be true of a local church between installed pastors.

Throughout my time as a Transitional Pastor, when various churches have asked me about the timeline question, I’ve learned to answer their question by asking another question: “That depends ... do you feel like your church is healthy and strong enough to begin looking for your next pastor quickly, or are there things you think we may need to address or attend to before you begin that search?” This question forces a moment of

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<sup>60</sup> “Week One Interim Training: Introduction” (class notes from lecture, Austin Seminary, Austin, TX, March 12, 2013).

reflection: examining the assumptions as well as the expectations they have regarding their pastoral transition.

The key is to reset every local church's expectation of the pastoral transition time from being one of simply following a checklist within a particular timeline to find their next permanent pastor, to instead recognize that a pastoral transition should be a welcomed time of true corporate reflection on overall health and future vitality before beginning the search. In some cases, a local church might be lucky enough to have a seasoned or well-trained transitional pastor who can help a Session wrestle with that question early on, which in turn, can help properly reset their expectations. In most cases, the opportunity to properly set the expectations for a pastoral transition is largely missed because that opportunity happens even before a transitional pastor is brought in. Thus, in order to properly align the expectations of a timely pastoral transition, critical changes are needed. The next change needs to be an improvement to the process.

### **Improve the Process (Proper Assessments)**

“By failing to prepare, you are preparing for failure.” This quote, which is widely attributed to Benjamin Franklin, accentuates the necessity of this next step.

The second step in the Transitional Ministry 2.0 model is meant to introduce a new “time of preparation” that will help (re)frame the transitional period and expectations for the local church and regional presbytery before a transitional pastor is brought in. This critical new step to the Transitional Ministry 2.0 model is: The Church Assessment. Instead of allowing the assumption of the current model to persist that most churches are healthy at their core and simply need to follow a path of technical steps for their transition, each presbytery needs to take the intentional step of assessing each church (in

senior or solo pastoral transition). Then it can be determined IF they are in fact healthy, or IF there are any easily identifiable issues that the church should wrestle with as a part of their transition process.

Beginning every pastoral transition with a Church Assessment not only helps determine the overall health of a local church but also identifies any potential issues to tackle during the transition. This step also aids in setting proper expectations for all parties involved: the local church, the presbytery, and the future transitional pastor. On the flip side, skipping this critical first step, which has been the case for decades, can leave all parties with differing, and, at times, conflicting expectations. The result has often led to less than productive transitional periods, or worse, lost opportunities for major course corrections that could have helped strengthen a local church's future viability. If the pastoral transition period truly is a consistently fertile period for congregational development, conducting a proper assessment that produces a clear plan and an appropriate set of expectations for all parties is a significant and essential first step.

The timing of the church assessment is critical. It needs to be started as soon as a senior or solo pastoral transition is announced. Whether the outgoing pastor is still there or has just departed, it is of the utmost importance to create a safe space for the current church leaders (Session, lay leaders, and when appropriate, other staff members) to speak freely and openly when asked specific and targeted questions regarding the current health of the church. The outgoing pastor should also be consulted and asked many of the same questions, but in a different place and space that does not cause interference with the remaining church leadership.

Ideally, when a presbytery works to establish this critical first step as a part of the Transitional Ministry 2.0 model, they will have a church assessment plan ready for action. The type of church assessment plan from each presbytery will likely depend on its size and its available resources. For example, the Church Assessment could be done by a trained transitional pastor in the Presbytery, by a small team of presbytery staff or COM members, or by an appropriate independent contractor or agency with a specialty in providing the results that meet the needs of the Presbytery and the local church. The assessment should be completed within two to three weeks, and the results then shared in an active reflection time with the current Session, before an agreement is reached on the transitional process, expectations, and permission to begin the search for the right type of transitional pastor. The results of this initial Congregational Assessment should also be made available upon request to any ministerial candidates engaged with the PNC near the end of the transition period.

### *What is Considered a Healthy Church?*

Plug in an academic search for a “healthy church,” and the result will be hundreds of thousands of books, articles, and dissertation possibilities. Engaging and comparing the work of contemporary writers on the matter, there are authors who rise to the top in prominence and frequency on this topic, including Mark Dever, George Barna, Thom Rainer, and Christian Schwartz. Some of these authors focus more on large to mega-size churches, others on the more evangelical or non-denominational churches. While I have no intention of wading into the giant pool of debate regarding the “proofs,” “marks,” or “habits” of a healthy church, it is important for the purposes of this dissertation to utilize a list of characteristics that show closer alignment with the observable and measurable

realities of mainline American Protestantism and, more specifically, the PCUSA churches of the Pacific Northwest in which I work.

One such book and list that I have used and referred to a great many times during my decades in ministry is Waldo J. Werning's book, *12 Pillars of a Healthy Church*.

Citing both biblical foundations and modern realities, Werning spells out the following list that I have summarized and modified with my own notes below:<sup>61</sup>

1. Empowering Leadership (Investing in congregational leaders)
2. Gift-Oriented Service/Ministry (Don't just look to fill an empty spot)
3. Passionate Spirituality (Is the Trinity your power source?)
4. Functional Structures/Administration/Servant Leadership (Does the organizational and administrative structure of the church promote healthy ministry, mission, and servant leadership?)
5. Inspiring/High-Impact/God-Exalting Worship Services (Moves us closer to God)
6. Intentional Disciple Making/Growing in the Community/Healthy and Multiplying Small Groups (The natural result of the Gospel is spiritual and numerical growth)
7. Active Witnessing/Missional Engagement/Fruitful Evangelism (Gospel drives us to be outwardly focused)
8. Loving Relationships (Exemplifying Christ's inclusive love for all people)
9. The Centrality of God's Word/Gospel/Grace (Keeping the main thing the main thing)
10. Mission and Vision Driven (Clearly communicated and guiding decision-making)
11. Biblical Financial Stewardship (Fostering a spirit of generosity, discipleship, and wise stewardship of resources)
12. Church Planting (either locally, regionally, or even internationally)

Rare would be the church that could exemplify all of these traits simultaneously, and the expectation should never be that a "healthy church" must meet all of these marks. Neither can churches from varying settings, backgrounds, or sizes be typically aligned for accurate comparisons. For instance, a church of 300 in a suburban setting would have some very different metrics in certain areas of this list in comparison to that of a rural

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<sup>61</sup> Werning, Waldo J. *12 Pillars of a Healthy Church*, 2<sup>nd</sup> ed. (Bloomington, MA: ChurchSmart Resources, 2001).

church in a historically native culture. The important point is that, while Werning's list is comprehensive, it also permits a breadth for flexibility and interpretation into specific contexts. That said, I recommend this list as a reliable reference point as we begin the discussion of church health assessments.

### *Identifying the Level of Transitional Need*

The goal of the church assessment is to rapidly determine, at least on the surface, how healthy a particular local church is and to help bring to light any easily identifiable church health or vitality issues needing to be addressed during the transitional period with the assistance and leadership of the Transitional Pastor. A checklist of church health qualities (Werning's list could be employed, for example) should be created and agreed upon for standardized use. A review of church membership, attendance, and giving trends should be conducted, as well as asking questions about overall church health, level of community and missional engagement, potential areas of disagreement or conflict, and near-future concerns. Presbyteries should also review any COM notes on their church or pastoral staff to determine whether any previous issues should also be considered.<sup>62,63</sup>

Once the above information is collected and proper meetings and interviews with limited and targeted questions have been conducted, the church assessment leader or team should work through the information quickly to determine what easily identifiable issues may be present. Once a list of potential church health and future vitality issues has

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<sup>62</sup> Corey Schlosser-Hall, interview by video conference with author, Vancouver, WA, March 21, 2019.

<sup>63</sup> Corey Schlosser-Hall has created a similar church assessment program as Executive Presbyter of the Northwest Coast Presbytery in Washington state and Alaska. It is their system that helped serve as the inspiration to the Church Assessment step of the Transitional Ministry 2.0 model.

been formulated, a meeting with the Session should be called to review the results and incorporate feedback. It should be recognized that this assessment is only brief and superficial, and should not be expected to reveal all potential issues that a well-trained and seasoned transitional pastor might uncover during their work. In contrast, if we go back to the updated metaphor earlier in this chapter of churches being like used cars changing hands, then this assessment should be more like taking that used car to your trusted car mechanics, letting their trained eyes determine the working order of the used car, as well as any potential presenting issues that might need attention or even a total overhaul.

In some cases, a church may, in fact, be in a very healthy place, and a traditional transitional process would be appropriate. In many cases, the assessment may bring to light a few but specific areas to be addressed during a transitional time. In these situations, both the type of transitional pastor as well as the appropriate timeline should be clearly laid out as part of the expectations of the transitional period. However, in some (we hope rare) cases, there may be significant presenting issues such as deeply embedded conflict or general unhealth. In those cases, the expectations for a timeline and potentially long-term transitional leadership should be carefully spelled out.

### **Improve the Structure (Church & Position Types)**

After a church assessment is completed, proper expectations need to be set regarding the transitional period timeline, work to be done, and the type of transitional pastor needed. Currently, the PCUSA denomination has a “one-size-fits-all” transitional model that has been largely devoid of an assessment step in most cases. I find that two critical structural changes are necessary to ensure that each transitional period has proper

expectations set for each local church; that a realistic timeline can be set, and that a properly trained transitional pastor can be found or placed to lead. The third change in the Transitional Ministry 2.0 model introduces two critical structural changes: creating a “Transitional Fitness Scale” and modifying the Transitional Pastor position types to best correspond with the new Transitional Fitness Scale (TFS).

### *Transitional Fitness Scale*

After the church assessment is completed (including a discussion with the local church Session), the assessment leader or team needs to place each local church into the Transitional Fitness Scale (TFS). The TFS consists of three fitness designations by color: Green, Yellow, and Red. Green is for healthy churches that would be best served with the traditional transitional model. Yellow is for churches showing some presenting issues regarding current church health or future vitality that would benefit from a longer and more deliberate transitional model. Red is reserved for the few churches that either have multiple presenting issues such as a history of major conflict, anxiety, or discord, or are clearly in short-term danger of closing their doors (within five years).<sup>64</sup>

Green is reserved for those churches that would typically be classified as “healthy” churches. Some of the typical signs of a healthy church include a recent history of worship attendance consistency (or growth), a history of community and missional engagement, diversity in generational ages represented, and a solid financial disposition. While the church assessment may have uncovered one or two minor issues needing

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<sup>64</sup> Some consideration was given to adding a “Blue” level as well. Blue would be for those rare churches that are exceptionally healthy with a clear mission and vision, and in turn, may not require a full traditional transitional period.



attention, the issues are straightforward and can be resolved in the traditional transitional timeline and mission study process with appropriate transitional leadership. While it is always possible a trained transitional pastor may uncover something not easily identifiable in the brief church assessment step, this designation affirms a green-level church in the work they are already doing and properly sets the expectations for their transitional time. The traditional timeline of “12-24 months” would hold true for green-level churches with the recognition that, in the majority of cases, a total transition time of fewer than 18 months is fairly uncommon.

Yellow is assigned for churches in which multiple church health or future vitality issues have been identified, but is not showing clear indications of a major conflict, anxiety, or discord issue, and is not in immediate danger of closing its doors within the next five years. Some of the signs for a yellow-level church might include a slow but consistent trend of decreasing worship attendance and participation, declines in overall giving, inconsistent community or missional engagement for its size, a membership largely representing only one or two generations, or a congregational make-up that doesn’t seem to match the easily identifiable demographics of their community. For a yellow-level church, there may be multiple adaptive challenges to be worked through before a mission study and PNC should be permitted to begin. This process would more accurately reflect where the church really is and what steps it has taken to work through those adaptive challenges: steps critical to an accurate and honest portrayal to any potential future pastor. A yellow-level church requires a well-trained and seasoned transitional pastor, and the timeline should be set more along the lines of 24-36 months, with the understanding that if the transitional pastor identifies additional issues in their

work, or the work on adaptive challenges proves longer than expected, that the timeline could be extended.

A church designated as yellow on the TFS might understandably come with a sense of disappointment. As stated previously, setting proper expectations is the key to the Transitional Ministry 2.0 model. When sharing the assessment results behind a yellow designation, it is imperative to reframe the situation to assure proper expectations: “An ounce of prevention is worth a pound of cure.” Returning to the analogy of taking a used car to a trusted mechanic, while yes, the mechanic found some issues needing to be resolved, doing so now will likely prevent a dreaded break-down later on. This is the same for a yellow-level church. Identifying and addressing issues now, while lengthening the transitional period should, in turn, lead to a healthier church, a more accurate mission study, and potentially a more accurate match for a new pastor to lead the church in its next chapter.

Red is the designation for those few remaining churches dealing with major conflict, anxiety, discord, scandal, or has serious financial concerns and may be in imminent danger of having to close its doors within the next five years. Signs of a red-level church may include:

- A steady and significant decline in worship attendance or membership.
- A history of power struggles between lay leaders, elders or pastoral leadership.
- Significant staff turnover.
- An unhealthy focus on the church’s history without a clear vision for its future.
- Budgeting that focuses heavily on the preservation of the church with little or no resources pointing toward active community or missional work.
- An episode of misconduct or scandal that is either recent or was not properly dealt with.
- A membership composition that largely reflects only 2-3 generations, or that is significantly non-representative of the community in which the church is based (i.e., age, race, income, etc.).

For a red-level church, while there may be multiple technical issues and adaptive challenges, the church is clearly not in a healthy place to walk through either a traditional or lengthened transition period. In most red-level churches, significant and prolonged work will typically be needed to address unhealthy leadership structures, promote long-term healing, re-center the church on its purpose for existence, determine the potential for future viability, or find possibilities for creating a completely new future. This is highly specialized work that needs to be done in a red-level church. While this designation is rare, it may be necessary in order to alert a hurting or dying church of their true situation. In going back to the car mechanic analogy, the trusted mechanic has discovered significant issues that, if not addressed immediately, could not only cause the vehicle to break down in the near future but could also put the lives of those riding in the vehicle in danger (the difference here is that in a hurting or dying church, while lives would not be in danger, their faith in Christ and spiritual walks could be significantly harmed). The mechanic's answer to such a dire diagnosis is often simple: either a complete overhaul, including replacement of critical parts to ensure future safety and performance, or a discussion of how to dispose of the vehicle properly.

One of the more difficult challenges of a red-level church is getting the local church leadership to fully understand and agree to the realities of their situation. In some cases, the lay leadership may be aware of presenting issues that point to a more difficult time ahead, while in other cases, there may be a level of ignorance or flat denial of the true health of the church. Thus, the Presbytery typically has two hurdles to jump with a red-level church: 1) Recognizing they are not yet in a healthy place to go through a

typical transition period and look for their next pastor, and 2) Finding a transitional pastor with the skillset and experience to work with this church.

The necessary work for a red-level church is highly specialized and is work that will always take time. Currently, there are few transitional pastors with the training, expertise, and adaptability to work with red-level churches. While it can be done, it typically requires significant time for completing the work before the congregation begins to see evidence of long-term course corrections. In these cases, a specific transitional timeline cannot and should not be given to the Session. Instead, a red-level transitional timeline should have a required minimum 36-month commitment, with additional 12 to 24 month extensions as needed. Along the way, the Presbytery should continue conducting additional church assessments along the way (after about 18 months) with the cooperation of the transitional pastor to determine progress and future need.

### *Transitional Pastor Positions*

Not only does the PCUSA have a “one-size-fits-all” approach for churches in transition, but they have the same for the transitional pastor position. If the church assessment process is going to better identify what type of transition period is needed for churches, then a similar alignment becomes necessary for transitional pastoral positions as well. Thus, the Transitional Ministry 2.0 model expands the transitional pastor requirements and expectations into three level-based positions.

**Level One Transitional Pastor (TP-1):** This position is in alignment with the necessary work associated with green-level churches as described above, and is similar to the expectations of what has traditionally been known as the interim pastor. A TP-1 could be a mix of pastors, seminary graduates who are “Certified for Call,” or HR pastors who

have the initial training or experience for certification by their presbytery to lead a green-level church through a healthy pastoral transition. In addition, they would be trained in how to identify potential adaptive challenges that may not have surfaced during the church assessment and how to work a corporate body through an adaptive challenge if or when it arises. The contracts for a TP-1 should be a minimum of 18 months, with six-month extensions as needed (limit of two), and a 60-day release with benefits. To preserve the “truth-telling” integrity of the transitional process, a TP-1 should never be allowed to be considered for the permanent pastoral position of the church they currently serve.

**Level Two Transitional Pastor (TP-2):** The TP-2 is a pastor who has been certified by their presbytery to lead a yellow-level church in transition. The TP-2 has the training or prior experience working with churches through multiple adaptive challenges or complex change while still moving a church forward over time through the transitional process toward a new vision and future permanent pastor. The TP-2 is not only trained in identifying and working through adaptive challenges common to churches today but also has the ability to help properly train Session leadership to take ongoing ownership of the adaptive solutions during transition and after the transitional period has ended. The contracts for a TP-2 should be a minimum of 24 months, with 12-month extensions as needed (limit of two), and a 90-day release with benefits. As with the TP-1, in order to maintain the “truth-telling” integrity of the transition process, the TP-2 should also never be allowed to be considered for the permanent pastoral position where they currently serve.

**Level Three Transitional Pastor (TP-3):** This position would be very similar in type and rules to the current “stated supply” that is already utilized in our denomination, but with the following clarifications: The TP-3 would be a position certified by their presbytery to work with red-level churches through a combination of specialized training and prior experiences. In many cases, the TP-3 will have additional supplemental training in working with churches in conflict or in church revitalization, necessary to meet the specific needs identified in a red-level church. The needs of a red-level church are many times more complex than a healthier church and previous behaviors may be so entrenched the timeline must send a clear indication to the church leadership that long-term specialized leadership is necessary to, hopefully, return the church to a healthier position with a chance toward reclaiming future vitality.

There are three major differences in the hiring of the TP-3 position. First, instead of the hiring process being completed solely by the Session, the hiring process for the TP-3 is a combination of members of Session and representatives of presbytery. This is to ensure the church receives the best match possible for the needs identified in the church assessment. Second, the TP-3 position needs to be overseen by both the Presbytery and the local church Session. With other transitional pastor positions, the Session would do the hiring, contract negotiations, and performance reviews, but with the TP-3, the Presbytery would also be involved in these aspects. The reason is that when the TP-3 pastor is guiding the church through more prolonged and difficult processes and changes which might make the church or Session uncomfortable, the Session would not be able to “escape” by directly letting go of their TP-3 without first seeking Presbytery approval.

Lastly, the contract for the TP-3 should be pre-negotiated by the Presbytery, with a minimum of 36 or 48 months to start and 12 to 24-month extensions, as determined by the Presbytery. The TP-3 would also assist the Presbytery with a fresh church assessment at least three months ahead of any contract extensions so that proper progress can be noted and updated expectations set. In contrast to the TP-1 and TP-2 positions, the TP-3 position should have the option for becoming the permanent pastor, if both the Session and the Presbytery agree to it, in accordance with any local Presbytery rules for such situations. The reason for the variance in these situations is that when a TP-3 pastor has been with a congregation for this significant a time period, building trust and helping lead a red-level church into a more positive and healthy direction, forcing another transition and new leadership may not be the most beneficial circumstance and could stifle future health and potential growth.

### **Improve the Training (Moving from Technical to Adaptive)**

*Give me six hours to cut down a tree, and I will spend the first four sharpening the axe.*  
-Abraham Lincoln

Lincoln knew the power of proper preparation and a strategic approach. The current training model employed by the PCUSA and other mainline denominations has essentially become a dull axe, rendering it wholly inadequate for the current needs facing local churches today. In order for the Transitional Ministry 2.0 model to succeed, the entire approach to training future Transitional Pastors must also change. Thus, the model for training will also need to be changed in three ways: 1) Setting a new foundation with Heifetz' theory of Adaptive Leadership, 2) Developing skills to identify and understand common adaptive challenges facing churches in transition, and 3) Restructuring the

training topics into a three-level system that specifically corresponds to the transitional needs based on the color-coded TFS system. Pastors, both active and HR, and those “certified for call,” can complete the first level of training and begin working as a TP-1. Those completing levels two and three of the new training can be considered for certification for the TP-2 and TP-3 level positions within their Presbytery. Ideally, there also can be a specific class for training those interested in doing Church Assessments in their Presbytery.

While the length of this dissertation does not afford me the time and space to conduct a deep dive into improvements in the training,<sup>65</sup> I am thankful for a colleague who is doing just that, focusing her dissertation on potential improvements to the training. The Rev. Shari Jackson Monson is a fellow transitional pastor who has worked in four different Presbyteries in the Pacific Northwest.<sup>66</sup> Since our paths crossed a few years back, we have compared transitional ministry notes and research findings, and imagined together what an updated Transitional Ministry model could do for churches and Presbyteries in our area. Rev. Monson is currently working on her D.MIN dissertation at Seattle University, focusing specifically on Transitional Ministry training, and I strongly urge my readers to consider her future insights into critical improvements needed to the denominational training.

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<sup>65</sup> See Appendix B for some targeted recommendations.

<sup>66</sup> Shari Jackson Monson, “About Me,” Interim By Design, last modified on April 16, 2019. <https://www.interimbydesign.com/about>.



### **Improve the Health (Proper Care of Transitional Pastors)**

Earlier it was noted that an ongoing issue for many presbyteries had been the lack of available transitional pastors to help with the growing number of local church transitions. In chapter one, my research shared a number of reasons for the shrinking pool of available transitional pastors. The top three reasons noted were the lack of transitional pastors with training matching the current complex needs of churches today, an absence of peer support and regional networking for coaching and future placement, and the differences and benefits versus installed pastors (most notably the lack of standardized sabbatical leave and resources) including potential disruptions in income. Is it any surprise that more and more pastors and those “certified for call” are passing on opportunities to consider transitional ministry? Some have even referred to these glaring differences as creating “second-class pastors.” While solutions to some of these issues have already been addressed above (proper training, appropriate contracts), the following additional steps will also help presbyteries take a big step in ensuring the long-term health and success of their Transitional Ministers.

#### *Networks and Coaching*

In my ongoing conversations with fellow transitional pastors, a consistent issue raised is a feeling of isolation and the lack of a group or network of fellow transitional pastors who truly understand the challenges of this area of specialized ministry. This lack of regional transitional ministry networks has left many transitional pastors feeling isolated in their work. When facing difficult or perplexing situations, the assistance of a regional expert or transitional coach, paid for via stipend by the Presbytery, could provide

a needed sounding board to talk through identifying adaptive challenges in real-time while also providing expertise on appropriate steps to handle those challenges.

### *Benefits and Sabbaticals*

The differences in benefits and sabbatical leave to installed pastors is arguably two of the most frustrating issues for transitional pastors that lead to some in this specialized ministry area expressing that they feel like “second-class pastors.” Thankfully, the solutions are very easy and straightforward, and, I would argue, should be considered as immediate and necessary changes for establishing equity and future credibility.

The first is in regard to benefits. Within the PCUSA, there is a comprehensive benefits package that includes family medical coverage, a pension plan, and death and disability coverage. These benefits are required through the Board of Pensions to be paid on behalf of all clergy in installed positions.<sup>67</sup> Unfortunately, these benefits are not required for non-installed pastors, which include transitional pastors throughout the denomination.<sup>68</sup> While some presbyteries, such as the Presbytery of the Cascades, specify a requirement for their local churches to extend the same benefits to transitional pastors in their contract template,<sup>69</sup> there are a great number of presbyteries that have not adopted a policy of requiring identical benefits. Most presbyteries have language that mirrors that

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<sup>67</sup> “Pastor’s Participation - the Board of Pensions,” Board of Pensions of the Presbyterian Church (U.S.A.), accessed September 5, 2020, <http://www.pensions.org/what-we-offer/benefits-packages/Pastors-Participation>.

<sup>68</sup> Ibid.

<sup>69</sup> *Commission on Ministry Manual of Operations* (Portland, OR: Presbytery of the Cascades, 2017), 58. Contradicting language in section 8 can be found on pg. 111, and is noted with suggested modification below.

of the Board of Pensions to say that “temporary positions are eligible but not mandated,” and include transitional pastors in the “temporary positions” classification.<sup>70</sup> This means that many transitional pastors are forced to negotiate for their benefits, while others are offered lower-level benefits (at a temporary cost-saving to the local church) or forced to pay out-of-pocket for their own benefits.

I believe there is a simple solution to help move transitional pastors out of “second class” status and honor their critical work as essential to the future health and vitality of local congregations. Presbyteries should adopt a policy change requiring the same level of benefits for Transitional Pastors as those offered to installed pastors. The policy change should move Transitional Pastors out of the “temporary positions” designation and into their own designation with matching mandated required benefits to installed pastors. In most cases, the policy change could be encapsulated as a single sentence added to the current presbytery policy. Using the Presbytery of the Cascades COM policy on required benefits (Section 8.1), the following suggested modification in italics could be considered:

Participation in the Benefits Plan is contained in the Terms of Call for pastors serving a congregation(s). Those in called/installed positions are mandated to be enrolled; *those in contracted transitional ministry positions are also mandated to be enrolled*; remaining temporary positions (scheduled for 20 hours or more per week) are eligible but not mandated.<sup>71</sup>

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<sup>70</sup> It should be noted that not all “temporary positions” within a presbytery are equal. For example, in many presbyteries the use of a Bridge Pastor who provides temporary service to a local congregation for only a few months, or a Sabbatical Fill Pastor, who’s assignment would only last an average of three months, should remain in the “temporary positions” classification.

<sup>71</sup> *Commission on Ministry Manual of Operations*, 111. Suggested language in italics is my addition.

The final issue is regarding sabbaticals. In much the same vein as benefits, those presbyteries that have adopted sabbatical policies for installed pastors typically lack a similar policy for transitional pastors. My home presbytery, Cascades, does, in fact, have language for sabbatical leave for “temporary supply” pastors,<sup>72</sup> but it neglects to address a major necessity for providing such leave for transitional pastors: funding. Many local churches take steps to save for expected sabbatical costs or apply for grants to assist with those costs. Sadly, there is no such planning in place for transitional pastors, as, by the very nature of their work, they will never be with a single congregation for the required six or more years to earn sabbatical leave, nor are there currently major grant programs available to assist with the typical costs for sabbatical leave for a transitional pastor.<sup>73</sup> The reality for most transitional pastors has been that if they need a sabbatical break, they have to save up their own money and take unpaid leave between temporary calls, or else be forced to work continuously without a break. (As a personal example, at the time of completing this dissertation, I will have worked continuously for 13 years as a transitional pastor and have lacked the financial means for taking a sabbatical, even after multiple attempts to secure time and funding through various means.) Without intentional, strategic planning, any opportunity to disengage from this demanding type of ministry for a paid sabbatical providing necessary rest, refreshment, and additional time of education will continue to be lost.

I believe there is a simple solution to this problem as well. Just as many Presbyteries have a requirement for their churches to offer and fund a sabbatical for their

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<sup>72</sup> Ibid., 104.

<sup>73</sup> Typical sabbatical costs for a transitional pastor would include salary and benefits, plus some allowance towards continuing education, professional expenses, and/or travel costs.

installed pastors, the same should be done for their transitional pastors. The difference is instead of one church carrying the burden, an approach of shared contributions could be the easy fix. The issue is the need to fund sabbaticals for these transitional pastors, and the best way is to have that funding come through their home presbytery. As part of the contract requirements detailed above regarding the various positions, each Presbytery can add a required half-month salary and benefits payment to a Presbytery Transitional Ministry Sabbatical Fund as a part of each transitional annual contract. For example, if a transitional pastor served in three consecutive positions of an average of 18-24 months, then the Presbytery would have enough funding to continue salary and benefits during that pastor's sabbatical. The annual payment would be based on a half-month of annual salary, Board of Pensions benefits payment, and 1/24 of the annual Professional Expense and Continuing Education reimbursable accounts. Chart 3.1 shows an example of this. I have based the calculations below with the following assumptions: 1) That each church would be paying the transitional pastor an annual salary (including housing allowance) of \$75,000,<sup>74</sup> 2) The Board of Pensions required "Pastor Participation" benefits payment based on 37% of annual salary,<sup>75</sup> and 3) Annual reimbursable accounts for Professional Expenses of \$3,500 and Continuing Education of \$1,500, which are based on the minimum required standards for the Presbytery of the Cascades for all ministers.<sup>76</sup>

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<sup>74</sup> \$75,000 was the rounded median annual salary for the transitional positions filled or open within the Presbytery of the Cascades at the time of this research.

<sup>75</sup> Board of Pensions Pastor Participation Program is set to be 37% of effective salary as of Jan. 1, 2021. "Pastor's Participation - the Board of Pensions," Board of Pensions of the Presbyterian Church (U.S.A.).

<sup>76</sup> "2021 Minister Terms of Call," Presbytery of the Cascades, accessed November 14, 2020, <https://www.cascadespresbytery.org/wp-content/uploads/2020/08/2021-Pastoral-Terms-of-Call-for-Website.pdf>.

Table 1 — Transitional Pastor Sabbatical Funding

<b>Transitional Pastor Sabbatical Funding Example</b>		
<i>Church in Contract Cycle</i>	<i>Annual Payment to Sabbatical Fund*</i>	<i>Building Total for Sabbatical</i>
Church “A” – Year 1	\$4,489.58	\$4,489.58
Church “A” – Year 2	\$4,489.58	\$8,979.16
Church “B” – Year 1	\$4,489.58	\$13,468.74
Church “B” – Year 2	\$4,489.58	\$17,958.32
Church “C” – Year 1	\$4,489.58	\$22,447.90
Church “C” – Year 2	\$4,489.58	\$26,937.48
	<b>Six-Year Total:</b>	<b>\$26,937.48</b>
<p>*Sabbatical Payment equivalent of ½ month of the following amounts:  Annual salary + Annual Board of Pensions benefits payment + Annual reimbursable account amounts.</p> <p><u>Divide each amount by 24, then add amounts together to determine annual payment to sabbatical fund.</u></p> <p>Annual Salary = \$75,000 / 24 = \$3,125.00  Board of Pensions = \$27,750 / 24 = \$1,156.25  Professional Expense = \$3,500 / 24 = \$ 145.83  Continuing Education = \$1,500 / 24 = \$ 62.50  <b>Total Annual Payment = \$4,489.58</b></p>		

In many cases of pastoral transitions, a local church has some gap between installed and transitional pastoral leadership, either at the beginning or end of transition time. These gap periods typically net some level of savings from not having to pay for salary and benefits during that gap (this does not include the few instances in which churches may have entered into a severance agreement with the departing pastor.) Utilizing only a portion of these gap savings as part of the transitional pastor sabbatical funding (requiring only a half-month of salary and benefits per year) avoids a significant impact on the budget of a local church, especially one that may have particular financial struggles. In this way, it continues the expectation that local churches save for a pastoral sabbatical while extending the benefit to the transitional pastors, spreading the financial responsibility out over multiple local churches. Lastly, it provides a funding source at the presbytery level that, when properly managed and overseen, can provide the necessary remuneration for these much-needed sabbaticals for this critical class of pastors.

### **Beta Testing (Finding the Bugs in the Programming)**

Just as programmers test new software programming to help determine its overall usability in real-world situations and to identify potential issues to be resolved, the same should be true for Transitional Ministry 2.0. In order to properly test the various components of Transitional Ministry 2.0, I will need to identify a few willing Presbyteries whose leadership agrees to the current needs and sees the potential in the updated model. Ideally, it would be best to work with Presbyteries that are in a common region, or at least in adjacent Synods. This allows for the potential of also forming a regional Transitional Ministry network, which would serve two immediate purposes: 1) Discussing what's working in the new model and what changes may need to be made before looking to deploy nationally or with other mainline denominations, and 2) Allow Transitional Pastors to better connect with fellow colleagues and regional denominational executives to provide ministry support and networking for potential future calls.

### **Anticipating Future Needs (Semiotics in Transitional Form)**

While Mead's original model worked well for a number of decades, there came the point when the model could no longer fully meet the current needs of local churches and Presbyteries and needs updating. As we embark on a potential updated model, we can never assume that Transitional Ministry 2.0 will be the model that meets all of the transitional needs of local churches, Presbyteries, and even other mainline denominational needs in the distant future. What our area of ministry has lacked is those skilled in semiotics. Semiotics comes from the Greek word "signs" and means the study

of signs and the art of making connections between them.<sup>77</sup> The Rev. Dr. Leonard Sweet, one of the great semioticians of our time, points back to Jesus' words in Matthew 16:2-3, "red skies in the morning, sailors take warning; red skies at night, sailors delight. You know how to read the signs of the sky, now learn how to read the signs of our times."<sup>78</sup>

Just as the church needs semioticians who can read the signs of our times and point the church toward the future, so, too, do we need semioticians within Transitional Ministry who can identify changes in both culture and in the local church in their early stages, anticipate future needs, and thus begin discussions of what future modifications to the model should look like. The greatest success of software companies is their ability to study consumers' changing needs, anticipate future needs, and begin dreaming of major changes before they are necessary. The same must be true of the Transitional Ministry model. The final determination of the success of Transitional Ministry 2.0 will be the creation of a community of Transitional Semioticians that can identify, discuss and recommend future modifications to the model, ideally much sooner than 40 years from now.

## **Conclusion**

As Transitional Ministry finds itself stuck in its own state of transition, the "Transitional Ministry 2.0" model offers the answer for moving PCUSA churches in a healthy direction before their search for their next pastor. Capitalizing on the opportunity that Mead noted in his research that churches in transition are more open to change,

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<sup>77</sup> Leonard Sweet, "Semiotics, Church and Culture: Portland Advance-Session One" (lecture, Portland Seminary, Portland, OR, September 4, 2018).

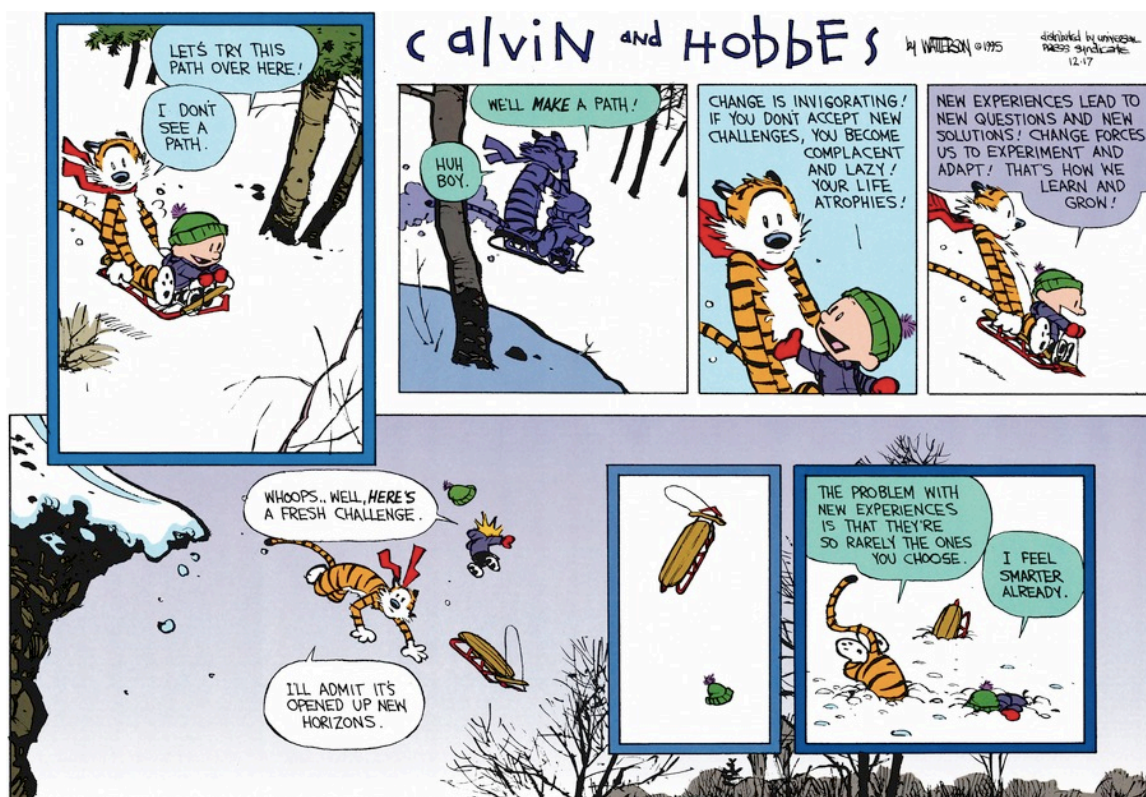
<sup>78</sup> Ibid.



Transitional Ministry 2.0 provides the necessary retooling to help Presbyteries more accurately identify the health status of a local church, set proper expectations for the time of transition, and align both training and position types to match the needs of each local church to maximize the impact of the transitional period. If the old English proverb is true, “An ounce of prevention is worth a pound of cure,” then the Transitional Ministry 2.0 model provides the much needed “prevention” by better identifying the true health status of a church in transition, setting proper expectations of the work needed, and creating better alignment of pastoral skillsets to the needs of the local church. In the end, the model will help churches and presbyteries capitalize on transitional opportunities, assure more churches are able to face modern challenges, and foster future vitality.

## CHAPTER 4:

### ARTIFACT DESCRIPTION



*Figure 3 — “Calvin and Hobbes” Comic<sup>79</sup>*

The artifact is a webinar specifically for regional presbytery executives, as well as those involved in transitional ministry leadership and training. The purpose of the artifact will be fourfold: to present my research findings regarding the current issues plaguing transitional ministry in the Pacific Northwest Region, to introduce the Transitional Ministry 2.0 model, highlighting its methodology and ability to address the problems at

<sup>79</sup> Bill Watterson, “Calvin and Hobbes,” *Universal Press Syndicate, Kansas City, MO*, December 17, 1995.

hand, to present foundational steps that will help move presbyteries toward this healthier model, and conclude with recommended steps toward implementation.

The artifact is a webinar instead of an in-person presentation due to the health and safety restrictions in place during the COVID-19 pandemic. The webinar will utilize Zoom video conferencing to conduct a web-based meeting and PowerPoint for the visuals. I will begin contacting the regional presbytery executives that were previously engaged during the research portion of my work, most of which work within our region. The webinar will be approximately 90 minutes in length and is broken into five sections:

- Section 1: Introduce my connection to Interim/Transitional Ministry, passion to determine current problems and identify long-term solutions.
- Section 2: Share research findings of causes behind regional issues plaguing transitional ministry.
- Section 3: Introduce Transitional Ministry 2.0, highlighting the model's signature pieces in summary form as the solution.
- Section 4: Summarize vision of how the holistic model can address and correct current and future needs.
- Section 5: Recommended steps toward regional implementation of the model.

The artifact is initially directed to presbytery executives and staff within the Pacific Northwest region, as the research findings for Section 2 are most relevant to this group. I also have a pre-existing relationship with many of these executives and am aware of their regional affiliations and working relationships as regional colleagues. This will give me the best opportunity to share the new model while also soliciting feedback and suggestions for improvement before expanding beyond the region. Finally, it allows for the most significant possibility of initial implementation and sharing the vision beyond our region.

### **Catalyst for Change**

The artifact's ultimate purpose is to promote Transitional Ministry 2.0 as the new model for the PCUSA nationally and possibly cross-denominationally. During my research process, my scope of contacts grew well beyond the Pacific Northwest. It included pastors and executives in other parts of the country, as well as in other mainline denominations. In those conversations, I discovered the main issues plaguing transitional ministry in our region of the PCUSA were also present in other parts of the country and in other mainline denominations. Using local PCUSA presbyteries to buy-in and successfully adopt this model of training and expectation regionally, the hope is that this new model will then find other presbyteries willing to consider implementation. Ultimately, my greatest hope is to see the acceptance of this model with the Office of the General Assembly of the PCUSA and even other denominations willing to consider adopting the new model into their ecclesiastical systems.

## CHAPTER 5:

### ARTIFACT SPECIFICATION

*Times and conditions change so rapidly that we must keep our aim  
constantly focused on the future.*

-Walt Disney

### **Goals, Strategies, and Audience**

The purpose behind Transitional Ministry 2.0 was to create a model embracing a healthy and adaptive approach to transitional ministry at every level. The artifact is the first necessary step for moving this model from thesis to reality. The main goals of the artifact are fourfold: to bring to light the underlying issues plaguing the current effectiveness of transitional ministry in our region; to introduce the Transitional Ministry 2.0 model as a necessary holistic solution; to begin a conversation toward future implementation and regional cooperation; to instill hope and a clear way forward for the continued and impactful use of transitional ministry.

The strategy behind the artifact is relatively straightforward. In most presbyteries, the executives are the ones who work most closely with churches in leadership transition and in the identification and recommendation of transitional pastors to fill those roles. My experience is that these executives are keenly aware of many of the problems regarding the supply level of transitional pastors, as well as the growing needs discussed previously among their churches. These executives are also in the best positions for casting vision and promoting positive changes within their presbyteries. This webinar will share vital information about the core issues affecting transitional ministry in their regions and reveal how this updated model aims to correct and improve those core issues. Providing

them with the information, vision, and critical steps toward implementation within their presbytery will, in turn, give Transitional Ministry 2.0 the best path toward becoming a reality nationally.

As mentioned in the “Beta Testing” section of Chapter 3, in order to properly test the various components of Transitional Ministry 2.0, I will need to identify a few willing Presbyteries whose leadership can concur with my research and thesis, see the potential in this updated holistic model, and be willing to implement key portions of it within their Presbyteries. Ideally, it would be best to work with Presbyteries that are in a common region, or at least in adjacent Synods, which takes advantage of the typical regional affiliations and relationships between presbytery executives and transitional pastors. This would allow for the optimal probability of cohesion and cooperation for implementing this new healthier model within the region. During the beta testing, I will also allow extra time after my webinar to solicit feedback and suggestions for improving both the model and the webinar presentation before expanding to other presbytery executives outside of our region.

### **Scope and Content**

The artifact will be an online presentation in webinar form via Zoom video conferencing and screen sharing of the PowerPoint presentation. All artifact materials, including the PowerPoint presentation and video of an initial test webinar, can be [found here](#).<sup>80</sup>

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<sup>80</sup> Contents of this Dropbox folder will be changed after dissertation defense with the appropriate permanent files for publication.

The content of the presentation is as follows:

*Section One: Introduction* – Begin with my connection to Interim/Transitional Ministry and passion not only to determine some of the issues plaguing our area of ministry but also to identify a long-term solution for the benefit of our churches, presbyteries, and even our denomination.

*Section Two: Issue at Hand* – Highlight the already known major problems affecting transitional ministry within the Pacific Northwest region, then share my research findings of some of the key causes behind those problems. It will also identify which causes are circumstantial and which are correctable.

*Section Three: A New Model* – Introduce the Transitional Ministry 2.0 model, highlighting the major pieces of the model in summary form. This includes the following subsections:

- *A New Methodology* – Presents a change of methodology using Heifetz’s theory of Adaptive Leadership as the new training and expectation foundation.
- *Church Assessments* – Introduces the critical church assessment step at the beginning of each pastoral leadership transition period to determine the current overall health, potential issues, and improved transitional pastor placement.
- *Transitional Fitness Scale* – Introduces the TFS that identifies current church health and transitional expectations with the color-coding system, coupled with the corresponding Transitional Pastor positions (TP-1, TP-2, and TP-3).
- *Training for the Future* – Discusses the necessary changes to the denomination’s transitional ministry training to align with the new model and methodology. Recommend having pastors wanting transitional ministry training to utilize the current Transitional Ministry Workshop hosted by Seattle Presbytery.
- *Promoting Good Health* – Introduces recommendations for the proper care and benefits for transitional pastors, including local networking and coaching, and how to align benefits and sabbaticals to similar standards for installed pastors.

*Section Four: Envisioning the Future* – Summarizes the vision of how the Transitional Ministry 2.0 model is the holistic solution that addresses and corrects the major issues previously identified, as well as addressing future transitional ministry needs.

*Section Five: Next Steps* – Shares recommended steps that can help move toward both local presbytery and regional implementation of the model.

### **Budget**

In terms of budget for this artifact, the costs are minimal in nature. The hardware needed to create and present the presentation, as well as to host the webinar, will be an up-to-date computer with internet access, a computer with an HD webcam, and a second monitor for viewing the presentation. In addition, the necessary software for this artifact will include Microsoft PowerPoint (Microsoft Office Home & Business 2019 for \$249.99/year) and an annual subscription to Zoom.us Pro Hosting plan (\$149.99/year). Lastly, after I spoke with Zoom customer support, they recommended a minimum internet speed requirement of at least 25MB/s upload and download speed for hosting a webinar with a graphics-based PowerPoint presentation. The minimum internet access package that meets this requirement for my home office is with Ziply Fiber at 30MB/s upload and download for \$43.98/month (including all taxes and fees). No additional software or equipment will be needed. As of the time of publication, I have all of the above items either in my possession or have already paid subscriptions for the necessary services.<sup>81</sup>

### **Promotion and Future Development**

Thankfully my previous research work and engagement with regional transitional pastors and presbytery executives, as well as soliciting input on the early versions of the

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<sup>81</sup> All amounts listed were current as of December 31, 2020.



2.0 model, has created some initial interest and anticipation for the webinar. I've already had a handful of offers to "test" out the webinar and share the new model when it is ready. For my early promotion, I will be able to begin sharing my artifact with the warm calling of those already connected and interested in my work to set up initial presentations of my webinar. This will be in an effort to gain early support, input, and hopefully, adoption. From there, I will continue with those regional executives in the area that I've connected with in the past but who may not be fully aware of my recent work. Lastly, I will then move to cold calling the remaining regional executives whom I have had no previous connection. The hope is to gain support and commitments from regional presbyteries which I can then share with surrounding presbyteries when I begin to expand my network of promotion.

Eventually, I want to increase the scope and audience by including those involved in our denomination's transitional ministry training, as well as seasoned transitional pastors and interested COM members. The purpose in eventually sharing this webinar with them is to help promote the vision of this new model so that they will, at the very least, be more open to its implementation, and ideally, be champions and co-laborers in the model. Lastly, I anticipate that if this webinar is successful in casting the vision of Transitional Ministry 2.0, eventually there will be a need to present it in a shorter form to larger audiences who may be considering steps toward implementation within their presbyteries, synods, or beyond.

In regard to the timeline, my initial goal is to have connected and shared my webinar with all eight Pacific Northwest regional presbytery executives by June of 2021 and to assist each presbytery intaking cooperative steps toward implementation by the

Summer of 2022. (This is with the understanding many presbyteries may require proposing COM policy changes at a stated presbytery meeting, and some regional presbyteries only have three stated meetings per year.) If a cooperative effort to adopt the new model begins to take shape within the region, then I will begin expanding the webinar to regional executives within other west coast and intermountain west presbyteries.

With the thought toward future development, there will be three major components of the Transitional Ministry 2.0 model that will need further work: church assessments, denominational training, and regional networking. I have two colleagues who have offered to work with me to create a church assessment system uniform in nature for the denomination and easily deployable following a short training. The initial idea is to create the assessment with the intention of publishing or creating a non-profit company that can administer the assessments remotely and in a timely manner on behalf of a presbytery. In regard to necessary changes to the denominational training, I am aware of colleagues who are passionate about this area (some of which have already been mentioned,) and I want to work with them on the integration of the Transitional Ministry 2.0 methodology and model into future curricula standards. Lastly, in order for the Transitional Ministry 2.0 model to be effective long-term, it requires the creation of regional transitional ministry networks, where transitional pastors stay connected and resource together on adaptive leadership and local church challenges, as well as connect with regional executives on future transitional pastoral calls.

## CHAPTER 6:

### POSTSCRIPT

*Jesus is the same yesterday, today, and forever.  
In order for Jesus to remain the same, He has to become new every morning.  
That's the paradox: In order for things to stay the same, they have to change!*

-Leonard Sweet

### Summary of Execution

At the time of this dissertation, I will be in my 13<sup>th</sup> year working as a transitional pastor. While this was not a ministry path that I had ever anticipated taking, God has clearly been at work guiding this journey while closing other potential ministry doors in the process. This journey has led to some amazing relationships, as well as finding myself in a new role as a transitional ministry mentor and coach. It was precisely this role as mentor and coach that led to the start of this dissertation.

One of my early pastoral mentors, the Rev. Dr. Libby Boatwright, once told me, “Mentoring is three-parts listening to every one-part teaching.” While I had begun to see some of the issues and problems presented earlier in this dissertation, it wasn’t until I began listening to others who were also involved in transitional ministry when I began to really grasp the full scope and range of them. It also jarred me when some of my fellow colleagues would ask in all honesty if Transitional Ministry still had any purpose or even a future.

I have been told by many that I’m wired as a change agent, a fixer, and a reformer. My mind naturally studies systems to determine how they work and then imagines the potential to make the systems more impactful or efficient. It’s part of the

reason I've enjoyed my work as a transitional pastor; tackling adaptive challenges and guiding church leadership through a process of discovery, vision, and experimentation so that each local church can become a better version of itself.

### **Analysis of the Approach**

This dissertation started with the desire to “add my voice to the conversation” and offer a way to resolve just one of our regional issues (namely the dwindling supply of transitional pastors). Diving into the research not only revealed the scope and complexity of these regional issues but also the way each issue was interrelated. As discussed in chapter two, it also showed how others were attempting to wrestle with a particular issue to find a corresponding solution. I found myself vacillating between creating a solution or crafting a ministry tool that could help to successfully address at least one of our issues. With each potential solution idea of my own, I quickly realized how it could fall short. It soon became apparent that finding a solution to address only one issue would essentially have no impact. A comprehensive and holistic solution that tackled *all* of the known issues simultaneously was the only logical solution. While something of this scale was beyond my scope of previous experience, the reformer in me refused to let go, wrestling for months until the vision of Transitional Ministry 2.0 finally began to take form.

While Mead has officially been described as a priest, teacher, and author, what is largely missed was the fact that he was also a visionary. Mead's declining health and eventual passing in 2018 meant losing the visionary who created the first version of this specialized ministry. I learned of his passing just days after turning in my first essay summarizing his research and initial discovery. Whenever there is a loss of a visionary, no matter the arena, an indelible hole is left waiting to be filled, or else risks being

forgotten. Some of my colleagues had remarked that Mead's passing could mean a loss of purpose and future to Transitional Ministry. Other colleagues (including some who know me well) encouraged me to engage my visionary and entrepreneurial experiences and attempt to fill that hole. Standing on the shoulders of Mead's research and vision, I offer the Transitional Ministry 2.0 model as a modern reformation of his original work.

Following the creation of the new model then came the question of promotion. There seemed to be three clear paths from which to choose: Turning the model into a publication, going directly to the Office of the General Assembly of the PCUSA to present it, or sharing this model with the executives of the regional presbyteries within the Pacific Northwest. I began discussing these potential paths with my dissertation cohort, advisor, and trusted ministry colleagues. Publishing the model seemed to be the most straightforward approach and it has been a popular next step for many following a doctoral dissertation. Some later counseled me that this approach could result in my publication becoming lost among the mass of other recent publications on Transitional Ministry. Equally concerning was the fact that the Office of the General Assembly is still lacking any direct administration regarding Transitional Ministry, while multiple attempts to interview someone in leadership with the TMEC for my research went repeatedly unacknowledged.

This left me with only one clear path in which to proceed, and that path has already proven to be productive. Sharing early portions of this model with select executives and Transitional Ministry trainers was fruitful and engaging, with terrific questions and feedback. After refining the various parts of the model, I finally presented my artifact with the full model in webinar form to the Rev. Clark Scalera, Advocate for

Congregations and Clergy, and part of the executive team for the Presbytery of the Cascades, on January 6, 2021. At the completion of the webinar, Scalera commented that the webinar was “an excellent presentation that conveys the meaning and intention of the ideas clearly...that neither rushes (the ideas) nor leaves them too loose...(striking) a good balance.” He added that the model provided “practical and helpful pieces as we consider the future of the church and how we care for the church in these coming years.” We then finished our time together by discussing practical next steps for our presbytery.

### **Conclusion**

When I began this dissertation journey in 2017, I had an initial sense this would be the conclusion of my academic journey, and at that time had no sense of clarity as to what might be after its completion. Three years later, as I now look back and reflect on the process as a whole, I come away with a profound sense of excitement and pride, recognizing this experience was not in fact so much the end of one journey, but the start of another. The reformer within me recognizes this model’s promotion and endorsement will bring experimentation and further refinement. At the same time, the entrepreneur in me envisions new tools, like a standardized early church assessment and a hybrid networking system for both transitional pastors and presbytery executives, that will be required in the near future. In addition, further research will be needed to consider which adaptive leadership tools would be most helpful to incorporate into future transitional ministry training curricula, as well as researching potential benefits to adding church redevelopment and revitalization into the TFS and TP leveling system.

As I submit this dissertation, I realize I have never experienced a sense of excitement and anticipation professionally quite as I do now with this body of research

and a truly holistic model to present. One lingering wish still remains; that I had been able to talk with Mead himself and share this solution, visionary to visionary, to see if he believed it embodied and furthered his initial work. Yet I recognize that we both engaged in this work for the same reason; our love of the Lord and desire to provide the local church and its leaders with the tools to become a better version of itself. Looking back, I can see God's fingerprints all along this journey, so I find myself praying, just as I'm sure Mead did, for God to take this work and use it as God sees best.

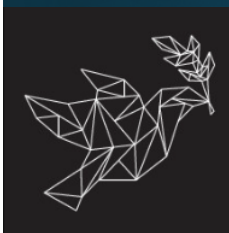
## APPENDIX A:

### ARTIFACT

Each page of the artifact will consist of two parts. The first part will include each PowerPoint slide in the order they are presented in the webinar. The second part will appear under each of the slides and will include the slide number, slide title, and any presenter's notes.



# transitional ministry 2.0



An adaptive and holistic solution  
to the original interim/transitional model

**Rev. Brian Craker**

D.MIN Candidate at Portland Seminary

## Slide 1 – Webinar Title Screen

- BEFORE STARTING ZOOM. Select SLIDESHOW → "Play from Start."
- Select "Swap Screens" to ensure Presenters View is on primary laptop screen, and slideshow is on second screen.  
Launch Zoom on primary screen.
- After participant(s) have joined and are ready, click "SHARE SCREEN" and select the option for "Microsoft PowerPoint."
- This should show the PowerPoint slides to the participants while keeping the Presenters View with speaking notes, as well as the Zoom video window on the primary laptop screen.
- CONFIRM CONSENT FOR RECORDING (if needed).



## Slide 2 – Thank You In Advance

- Thank you in advance for taking the time for this webinar.
- Look forward to your questions and feedback both during and at the end of the webinar.

## Purpose of this webinar:

- Acknowledge the growing concerns about Interim/Transitional Ministry in the Pacific Northwest.
- Identify causes behind current issues.
- Unpack why the old model based on the Five Developmental Tasks just isn't working like it used to.
- Introduce an updated, holistic model that addresses current and future issues.



### Slide 3 – Purpose of the Webinar

- Acknowledge the growing concerns about Interim/Transitional Ministry in the Pacific Northwest.
- Identify causes behind current issues.
- Unpack why the old model, based on the Five Developmental Tasks, just isn't working like it used to.
- Introduce an updated, holistic model that addresses current and future issues.

# Our Journey Today...

- Introduction
- Issues at Hand
- Transitional Ministry 2.0 Model
- Envisioning the Future
- Next Steps



## Slide 4 – Our Journey Today...

- Our journey today will take us through five areas:
  - Introduction (Why me...why now? God's timing is always perfect...)
  - Issues at Hand (Issues currently plaguing Transitional Ministry)
  - Transitional Ministry 2.0 Model
  - Envisioning the Future (How new model corrects both current and future issues)
  - Next Steps (What would it look like if your presbytery were to affirm and adopt this new model...)

## Section 1: Introduction



- Called PNW & Cascades Presbytery home since 1996.
- Started as interim pastor in 2008.
- Role as mentor/coach revealed significance of current issues.
- Turned concern into passion to research causes, identify long-term solutions.

### **Slide 5 – Section 1: Introduction**

- Called PNW & Cascades Presbytery home since 1996.
- Started as interim pastor in 2008 (not something I ever expected to do, much less for the last 13 years!)
- Role as transitional mentor/coach revealed significance of current issues.
- Turned concern into passion to research causes, identify long-term solutions.
- Started D.MIN process at George Fox with thought of identifying one major issue and find a solution to that one issue.
- Research not only revealed multiple issues to resolve, but that no single solution worked on its own.
- Answer was to identifying all solutions and engineer them together into a single model.
- Not what I set out to do, but this is what God has revealed to me on this journey, and I can't wait to share it in full with you.

## Is it Interim or Transitional Ministry?



### Slide 6 – Is it Interim or Transitional Ministry?

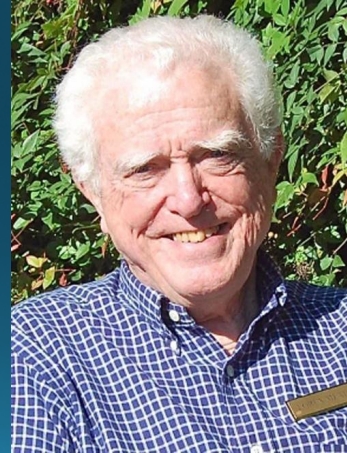
- Before we go further: Terminology Clarification
- Is it Interim Ministry or Transitional Ministry?
- Answer: YES!
- But...recently our denomination (and other mainlines) has started using “Transitional Ministry” in recognition that not all times of transition start with an installed pastor leaving or retiring.
- So, for this presentation (as in my dissertation) we will utilize the term “Transitional Ministry” as a nod to the future.



# The Power of the Transition Period

Loren Mead's Discovery:

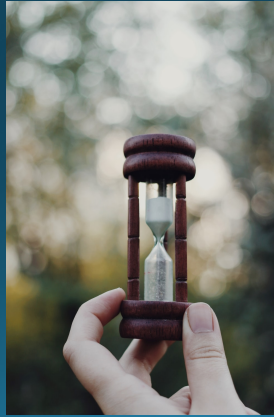
- The Transitional period is one of the most fertile times for congregational development.
- It is one of the best times for a local church to see clearly what needs to happen during its "normal" times.



## Slide 7 – The Power of the Transitional Period

- Start with a VERY BRIEF history of Transitional Ministry.
- In 1974, Loren Mead, an Episcopal Priest also had a researcher and consultant heart to help the greater church.
- Believed there was value in the growing field of Organizational Development that could help the church.
- In his research, he stumbled onto the discovery that the Transitional Period between installed pastors was one of THE MOST FERTILE TIMES for congregational development.
- Presented his findings in 1976, and by 1981, the Interim Ministry model as we know it was born (the Episcopal, Methodist UCC and Presbyterians working together.)
- Research still shows that even in corporate and non-profit sectors, that major leadership transitions continue to be one of the BEST TIMES for an organization to step back and vision for what "could be."
- I believe it is still one of the BEST TIMES for a local church to see clearly what needs to happen during its "normal" times.

We can't let these  
vital opportunities slip away...



**Slide 8 – We can't let these vital opportunities slip away...**

- The problem is that without proper transitional leadership, these vital opportunities of reflection, visioning and change could be lost.
- Used to be a day with most churches were healthy enough that a missed or ineffective transition period wasn't as big of a deal.
- That's no longer the case. In fact, some churches that are struggling or in decline, could be one missed opportunity from eventually shutting their doors.



## Section 2: Issues At Hand

Known major issues affecting Transitional Ministry in the PNW:

- Overall Church Health
- Mismatch of transitional expectations
- Denominational training & networking
- Dwindling pool of trained transitional pastors
- Issues facing transitional pastors

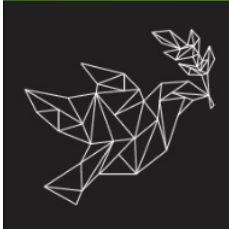


### **Slide 9 – Section 2: Issues at Hand**

- So, what are some of the major issues affecting Transitional Ministry in the PNW?
  - I'm sure as an executive you're likely already aware of many of these issues, and already seen them in play.
- Spent two years researching these, talking with executives, COM members, transitional pastors (current and retired), and even transitional ministry trainers. Here's what I learned:
- \*Overall church health: Increasing number of churches facing prolonged decline, or significant and even existential issues.
  - One executive put it: 10 years ago, maybe 1 or 2 churches in transition with health issues, now almost half (sometimes more) have something that needs attention.
- \*Mismatch of transitional expectations. Church expects 12-18 month "normal" transition, Presbytery or Transitional Pastor may see otherwise.
  - Another mismatch is transitional pastor brought in doesn't have training/experience to match needs of the church.
- \*Growing disconnect between denominational training and modern needs of churches in transition.
  - Traditional training uses old metaphor and expectation that all churches are healthy, just need to be guided through transitional steps.
  - Not always trained to identify critical issues, or skill set to help a local church Session navigate those issues, and help change course in positive direction.
- \*Dwindling pool of trained transitional pastors. Sheer numbers game.

- Cascades Presbytery 10 years ago: Dozen seasoned interims in or available to deploy. Now? Less than half that.
  - Retirements + long-time lack of more affordable West Coast trainings has been a huge hit. Then two-year hiatus of the IMEC (now TMEC) didn't help...
- \*Issues facing transitional pastors:
  - Reluctant to relocate due to economic or family issues, limiting to a metropolitan area to limit difficulties with moving.
  - Feeling of "second-class pastors" due to lower wages, inequitable benefits to installed pastors, or adequate time off or sabbatical to recharge.
- NO ONE ISSUE...combination of all of these major issues together has had an impact.
  - The lake has been shrinking for some time now...
- [TRANSITION] Each issue is intertwined with the others, so the solution has to be a holistic one that attempts to address all of the issues at their sources.

## Section 3: A New Model



### **transitional ministry 2.0**

*A holistic model that resolves, improves and protects this critical time of reflection, vision and positive change.*

#### **Slide 10 – Section 3: A New Model**

- A New Model that seeks to do just that!
- Transitional Ministry 2.0 is a major systematic update to our original Interim/Transitional model.
- It's a holistic approach that seeks to resolve, improve and protect this critical time of reflection, vision and positive change.



## transitional ministry 2.0

### Five Keys to Success:

- A New Methodology
- Early Church Assessments
- Transitional Fitness Scale (TFS)
- Training for the Future
- Promoting Good Health



### Slide 11 –Five Keys to Success:

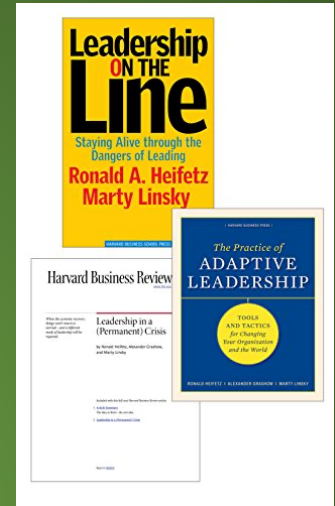
- The Transitional Ministry 2.0 Model is based on Five Major Improvements, which I refer to as the “Five Keys to Success”
- \*A New Methodology
- \*Early Church Assessments
- \*Creation of a new Transitional Fitness Scale (TFS)
- \*Modifying the Training for the Future
- \*Promoting Good Health for those involved in Transitional Ministry



## Key 1: A New Methodology

### Adaptive Leadership

- Based on Ron Heifetz theory
- Technical Problems vs. Adaptive Challenges
- Five Developmental Tasks = Technical Solution
- Adaptive Leadership creates space for honest reflection, discovery and experimentation.
- Restructure transitional training to Adaptive Leadership methodology.



### Slide 12 – Key 1: A New Methodology

- First Key: Need a New Methodology.
- New methodology is based on Ron Heifetz's theory of Adaptive Leadership.
  - Heifetz theory shows that there are two kinds of struggles that face both corporations and organizations.
- First are technical problems. These are typically easy to identify, and normally have a straightforward, technical or systematic answer.
  - Example: The financial books are off. Why? Well, no one has entered the income and expenses into QuickBooks in a few weeks. Technical problem, technical solution.
- Current model for Transitional Ministry is technically based. Church is in leadership transition. Solution? They need an interim pastor who can take care of things until the next installed pastor comes.
  - Five Developmental Tasks (of which the COM reports are built), are a technical solution-based approach.
- But what if the problem isn't technical, what if it is adaptive?
  - Example: Giving is down at our church, and has been slowly going down for the last few years. Why? Well, the answer may not be so straightforward. (In many cases, they look for technical solutions.)
  - Adaptive challenge at hand. What is the cause of the decrease in giving? Are there other clues? Is the answer easy?
- Adaptive leadership creates space for honest reflection, discovery, and experimentation.

- Current training has long been technical problem/technical solution based. Need to restructure the methodology of training to base on Adaptive Leadership methodology.
- [TRANSITION] Need a clearer picture...?



### Slide 13 – Change the Metaphor...

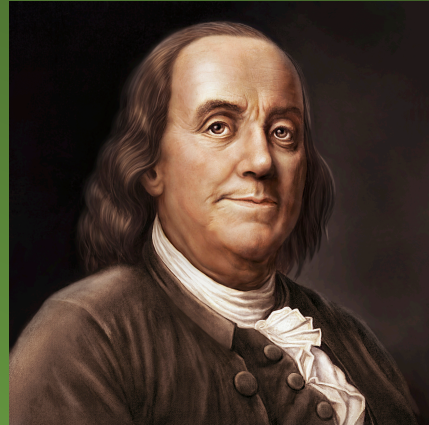
- Change of Methodology can be summed up in this change of metaphor...
- \*Current Training Metaphor:
  - Transitional Ministry like train engineer. Purpose is to replace the previous engineer and get the train to the next station where it can pick up its new engineer.
  - Job of Transitional Pastor “Keep the train on the tracks.”
- Technical problem—technical solution. Five developmental tasks that help “guide” a church in transition until they find their next pastor.
- \*New Metaphor:
  - Transitional Pastor like a trusted mechanic. Take a beautiful used car that you are considering purchasing, need to trust that it can safely transport you and/or family.
  - May look fine on the outside, but never assume everything is perfect “under the hood.”
  - Take it to your trusted mechanic to give appropriate level of scrutiny, and determine what repairs can or should be done to make it reliable for the future.
- Adaptive Leadership: Creating space for honest reflection, discovery, and positive change for the future.



## Key 2: Early Church Assessments

*"By failing to prepare,  
you are preparing for failure."*

-Benjamin Franklin



### Slide 14 – Key 2: Early Church Assessments

- Takes us to our 2nd Key of the Transitional Ministry 2.0 model: Early Church Assessments.
- Ben Franklin Quote: "By failing to prepare, you are preparing for failure."
- How do we know if a church is truly "healthy" as it enters a time of transition?
- What issues might it need to address to ensure its future vitality?
- As the old saying goes, "If you aim at nothing, you'll hit it every time."
- That's pretty much what we've been doing for decades now, with lack of uniform assessment system
- [TRANSITION] Enter: Early Church Assessments





## Key 2: Early Church Assessments

### “Time of Preparation”

- Started when solo/senior pastoral transition is announced.  
(Could also be done for associate transitions as needed...)
- High level look at overall church health.
- Should take 2-3 weeks at most to complete.
- Completed before transitional pastor hiring begins.

### Slide 15 – Key 2: Early Church Assessments

- Modeled in part by what Corey has been doing with his COM up in Northwest Coast Presbytery.
- \*Creates intentional “Time of Preparation.”
  - High level look (think 10,000ft) at overall church health.
  - Meant to be completed in 2-3 weeks total.
- Would gather limited but specific data, and ask targeted questions of key people.
- Completed before a TPNC is started (could even be completed before outgoing pastor has left in safe situations.)
- Not going to uncover EVERYTHING...but that’s not the purpose.
  - Purpose is to uncover enough to get a sense of where the church is at health wise.
  - If done well by trained presbytery members or consultant, will uncover enough to determine where church health is likely at.




## Key 2: Early Church Assessments

### Prepares for transitional success...

- Review results with Session.
- Agree on health and transitional needs.
- Helps set proper expectations and timeline.

### Slide 16 – Key 2 Continued

- Once assessment is completed and results pulled together, meet to review the results with the Session. See if they agree, or have any reflections.
- When everyone can agree on health results, they can then determine what their transitional needs will be.
  - This includes setting proper expectations and appropriate timelines.
  - For instance, while a healthy church could expect a traditional transitional period, a church with some health or vitality concerns would require a longer transitional period and more experienced transitional pastor.
- This “time of preparation” with a required early church assessment will ensure the setting of proper expectations, timelines, and give a greater probability to match them with an appropriate transitional minister.
- [TRANSITION] What might those church assessment results look like, and how would one find an appropriate Transitional Pastor match? Glad you asked! That’s key #3....



**Key 3: Transitional Fitness Scale (TFS)**

**Aligning Transitional expectations for church & pastors...**

- Creation of TFS to correspond with church assessment results.
- Alignment of Transitional Pastors to TFS Levels.
- Configures proper expectations of church transitional needs to transitional pastor training and experience.

*"An ounce of prevention is worth a pound of cure."*



### Slide 17 – Key 3: Transitional Fitness Scale (TFS)

- Key #3 is the creation of a new Transitional Fitness Scale (or TFS for short).
- The TFS is a color-coded system that will help take the church assessment results and align them with proper transitional expectations.
  - Then we will align the Transitional Pastor levels based on training and/or experience to the appropriate TFS color.
- Old model: We throw the Interim/Transitional Pastor in and hope they can uncover where a church is really at, and still have time to fix some of the things they uncover before their time is up (or the Session gets mad and kicks them out.)
- New model couples the power of the Early Church Assessment with proper preparation and expectations.
  - The result is a proper configuration of church transitional needs, proper timeline expectations, and transitional pastor placement.
  - Based on the premise: “An ounce of prevention is worth a pound of cure.”
- As you can see, the color-coded fitness scale is green, yellow and red. (Appropriate health related colors in real life as well).
- Let’s dig into the TFS system a bit deeper....



## Key 3: Transitional Fitness Scale (TFS)




### TFS System = GREEN


- Relatively Healthy Church
  - Consistency in worship, membership &/or giving.
  - Clear vision/purpose
  - Relevant community/mission engagement
  - No major questions of future vitality
- Traditional Transitional Model
- Transitional Timeline = 18-24 months ,  
6-12 month extensions if needed.

### Slide 18 – TFS System = GREEN

- TFS Green Level Church
- This is your garden variety, relatively healthy church.
- What would the signs of a green church look like?
  - Consistency in worship, membership &/or giving (might have some ups and downs, but no clear prolonged downward trend.)
  - Clear vision or purpose
  - Relevant community/missional engagement (depending on size, possibly local, national, and international)
  - No major questions of future vitality.
  - (Might have one or two minor issues that may need to be addressed, but nothing significant.)
- This is where we would expect to use our traditional transitional model.
  - Used to be 12-24 months, but as we know, rare is the church that gets a new pastor in place in under 18 months.
  - So let's call the timeline 18-24 months.



## Key 3: Transitional Fitness Scale (TFS)




### TFS System = YELLOW


- Presence of one or more church health issues:
  - Slow decline in worship, membership &/or giving.
  - Lack of vision
  - Inconsistent community/mission engagement
  - Significant demographic mismatch to community
  - Questions of future vitality
- Modified Transitional Process
- Transitional Timeline = 24-36 months, 12 month extensions as needed (48 months max).

### Slide 19 – TFS System = YELLOW

- TFS Yellow Level Church
- This is what we are starting to see more of in the last decade, and the ones that if not properly cared for, could slip into the red health level in time.
- What would the signs of a yellow church look like?
  - Slow, steady decline in worship, membership &/or giving.
  - A lack of clear vision or purpose. Starting to look more to their history than their future.
  - \*Inconsistent community/missional engagement (holding on to old community outreach, not relevant to current community needs.
  - \*Demographics no longer a match with their surrounding community (some cases is a glaring mismatch).
  - \*Starting to have questions of future vitality.
- This is where we would want to use a modified transitional process and extended transitional timeline.
  - Would look at 24-36 months (intentionally working on adaptive challenges and solutions before allowing PNC to activate.). Could offer 12-month extensions if additional time is required, but really would want to have things wrapped in in 48 months max.



## Key 3: Transitional Fitness Scale (TFS)



### TFS System = RED

- Presence of any major church health issues:
  - Significant decline in worship, membership and/or giving.
  - History of conflict, anxiety or discord.
  - Situation of trauma or scandal.
  - At risk of closing doors within next 5 years.
- Specialized Transitional Process
- Transitional Timeline = 36 month start, 12-24 month extensions as needed.

### Slide 20 – TFS System = RED

- TFS Red Level Church
- While these churches are currently rare, (that is, if we take proper care for our yellow churches in transition...), but red churches are one missed opportunity away from closing their doors.
- What would the signs of a red church be?
  - \*Significant decline in worship, membership &/or giving (may be because of a particular event, or sharp steady decline over a period of time.)
  - \*Likely a history of conflict, anxiety or discord, or a situation of trauma or scandal.
  - \*Almost exclusively looking to their history than their present, much less their future.
  - \*Nonexistent community/missional engagement, or holding on to an old community outreach that's clearly irrelevant to current community needs.
  - \*Significant demographics mismatch to their surrounding community.
  - \*At real risk of closing their doors within the next 5 years.
- Would classify as RED if ANY of these significant signs are present.
- This is where we would want to use a specialized transitional process a minimum 36-month contract so that the church and pastor are clear that this transition is going to take a while and require a lot of work. Then conducting another health assessment close to the 3-year mark, before determining remaining work to be done, and offering 12–24-month extensions.



Key 3: Transitional Fitness Scale (TFS)	
TFS Scale	Transitional Pastor Level
Green 	<b>TP-1 = Level 1 Transitional Training/Experience</b> -18 mo. contract, 6-12 mo. extensions <i>-Can NOT be considered for installation.</i>
Yellow 	<b>TP-2 = Level 2 Transitional Training/Experience</b> -24 mo. contract, 12 mo. extensions <i>-Can NOT be considered for installation.</i>
Red 	<b>TP-3 = Level 3 Transitional Training/Experience</b> -36 mo. contract, 12-24 mo. extensions <i>-COULD be considered for installation.</i>

### Slide 21 – Transitional Pastor Levels

- To compliment the color-coded Transitional Fitness Scales for churches, we then align them to three levels of Transitional Pastors, based on training and/or experience.
  - For instance, a green level church would require at least a Level One Transitional Pastor, or TP-1, a yellow church would require at least a Level Two Transitional Pastor or TP-2, and the same for a red church and a Level 3 pastor, or TP-3.
  - Each level would then have their appropriate minimum contracts and then extensions as needed.
  - Now a TP-2 could still be asked to serve a green level church, and a TP-3 could be asked to serve ANY level church, but what the system does is assure that a pastor WITHOUT the proper training or experience doesn't find themselves in a church that requires more than the pastor is properly prepared for.
- NOTE: To preserve the “truth-telling” integrity of Transitional Ministry, and the truth telling abilities required of Adaptive Leadership during times of transition, Level 1 & 2 Transitional Pastors SHOULD NEVER be allowed to be considered for installation at the churches they are currently serving.
  - The one exception would be Level 3 Transitional Pastors, who similar to long-serving stated supply pastors in more difficult positions and who build critical trust over time. This could be where, with the review and support of Presbytery, COULD be allowed to be considered for installation.

- \*BEFORE WE MOVE ON...an important note: When discussing the assessment results and transitional level with a Session, you would want to share the details of the appropriate Transitional Pastor Level (TP-1, 2 or 3), but MAY NOT want to share the corresponding church health color.
  - The color-coded church health scale is meant for Presbytery and COM reference only. You could see the inherent danger of coming to a Session and saying, “well, we think you’re a RED church.”
  - Instead, one should approach the Session with, “based on the results of the church assessment that we’ve reviewed together, we would recommend a TP-# for your transition.
- [Be sure to pause and allow for clarification questions here...]
- [TRANSITION] So the TFS and Transitional Pastor level system solves the problem of assessing current church health and aligning expectations with proper training and experience. But our current training model doesn’t quite match this yet...and what about our dwindling pool of available interims, especially to tackle what has been the majority of transitions as green-level churches?





## Key 4: Training for the Future

### Restructuring Denominational Training

- Adaptive Leadership Methodology
- Three-tiered system to match TFS & TP levels
- Make Level One training available to as many as possible to help refill pool of available transitional pastors.
- Level Two and Three trainings align with TFS needs.
- Level Three can also include becoming transitional coach/mentor and/or Presbytery resource.



### Slide 22 – Key 4: Training for the Future

- Key #4: Training for the Future: Restructuring Current Denominational Training
- Start with new curriculum that is based on the Adaptive Leadership Methodology
- \*Scott and Eliana in Seattle Presbytery have already started doing this!  
Transitional Ministry Workshop—broke away from the traditional model.
  - Scott rewrote over half of the curriculum with adaptive leadership model.
  - Already far superior than the previous outdated curriculum.
- Create a Three-tiered training system to match TFS & TP levels
- \*Make Level One training available to as many as possible (including seminarians, certified “Ready-for-Call” and HR pastors.)
  - Make these trainings local (or online), and inexpensive (or subsidized).
  - This will help get a greater number of potential transitional pastors trained.
  - IF NEEDED: Consider changing the rules and encourage/allow ordination for those “certified for call” into transitional positions.
- \*Level Two and Three trainings also align with TFS needs. Should likely be “in-person” (COVID permitting) but also local (in PNW) to keep costs reasonable.
- \*Incentive for doing Level Three training could be including becoming a transitional coach/mentor and/or Presbytery resource (when possible, with stipend or additional income source for coaching.).
- [TRANSITION] So Key #4 helps address how to make sure we are properly training our transitional pastors and working to increase the pool of available transitional pastors, but what about the final issue...proper care of these pastors? How do we change things to help assure they feel appreciated and vital to the greater work of the church and in turn, becoming a long-term benefit to our presbytery (and surrounding presbyteries)?



## Key 5: Promoting Good Health

### Ensuring Long-Term Health and Success of Transitional Pastors

- Matching proper training/experience
- Providing local/regional networking and coaching
- Appropriate contracts
- Requiring equal benefits to installed pastors, including pay, BOP and reimbursables
- Creating sabbatical funding system



### Slide 23 – Key 5: Promoting Good Health

- Final key to the Transitional Ministry 2.0 model: Promoting Good Health
- We need to ensure the long-term health and success of our transitional pastors. How?
- \*Starts with matching proper training and experience to each temporary call.
  - Example: Don't allow a rookie transitional pastor to go into a red church, just because they're desperate to fill the position.
- \*Make sure ALL of your transitional pastors have access to some level of support, and even networking, whether local in your presbytery, or in conjunction with surrounding presbyteries.
  - This work can feel very isolating at times, especially if you run across a situation that you're not entirely sure how to discern or proceed, it helps to have a coach or network of other transitional pastors for help.
- \*Make sure your pastors have appropriate contacts for the work that they need to do, without getting kicked out too early, and enough time to plan for the next call (and appropriate time-off if needed.)
- \*Require equal benefits to installed pastors.
  - This includes equitable pay, Board of Pensions benefits, and reimbursable accounts.
  - I've seen in some Presbyteries where for transitional/temporary pastors, there is no minimum pay, no required BOP, and no minimum reimbursable account.
  - (Share story of interim that "had to use their savings" while serving a church.)

- \*Lastly, transitional ministry is important work, but in most cases, it is high stress and demanding work. Those that stick with it need sabbaticals, just like installed pastors (maybe even more).
- \*Create a sabbatical funding system.
  - Dissertation has a very simple plan of how to fund a transitional pastor sabbatical account at a Presbytery level, where each church in transition kicks in a half-month of annual salary & benefits each contract year to the sabbatical fund.
  - Then after 6-7 years, each transitional pastor has enough in the account to cover salary + benefits for a 3-month sabbatical.
  - It's simple, straightforward, and would be an easy addition to presbytery contract system, while spreading the cost out across multiple churches served.
- Why are these steps so important?
  - Transitional Pastors will always have the risk of potential span of unemployment between calls. But their work is VITAL for the long-term health of our churches.
  - We need to ensure that we take care of everything else to ensure their proper care so they will stick with this critical specialized ministry.
- PREMISE OF PROMOTING GOOD HEALTH: An ounce of prevention is worth a pound of cure.



## transitional ministry 2.0

### Five Keys to Success:

- A New Methodology
- Early Church Assessments
- Transitional Fitness Scale (TFS)
- Training for the Future
- Promoting Good Health



### Slide 24 – TM 2.0: Five Keys Recap

- A quick review of the “Five Keys to Success” of the Transitional Ministry 2.0 model:
- \*A New Methodology
- \*Early Church Assessments
- \*Creation of a new Transitional Fitness Scale (TFS)
- \*Modifying the Training for the Future
- \*Promoting Good Health for those involved in Transitional Ministry.

## Section 4: Envisioning the Future



### How TM2.0 can correct current issues:

- Aligns methodology & training to better address current church health and vitality issues
- Sets proper expectations for churches, presbyteries and transitional pastors.
- Increases number of trained and available transitional pastors.
- Promotes positive future results.

### Slide 25 – Section 4: Envisioning the Future

- We began our time with looking at the complexity of issues currently plaguing transitional ministry in our region.
- Then we unpacked TM 2.0 with its five keys to success.
- Now I want to ask you a question...
- Can you envision a future in which TM 2.0 can correct those current issues by:
  - \*Aligning methodology & training to better address current church health and vitality issues.
  - \*Setting proper expectations for churches, presbyteries and transitional pastors.
  - \*Increasing the number of trained and available transitional pastors.
  - \*Promoting positive future results...not just in your presbytery, and in neighboring presbyteries, and potentially moving our entire denomination toward more positive future?

## Section 5: Next Steps



### Phased-In Approach

- Phase 1: PNW Presbytery Endorsement; use of TMW
- Phase 2: Church Assessments, TFS & TP
- Phase 3: Good Health Measures, Local/Regional Network
- Phase 4: Expanded West Coast/Intermountain West Presbytery Engagement
- Phase 5: Denominational Adoption, TM Training Adoption

### Slide 26 – Section 5: Next Steps

- As we finish our time, you may be asking, “okay, how could explore making this a reality?”
- Just as it took Loren Mead and the original Interim Ministry Network to fully turn Mead’s vision into reality, I think the same will be true of TM 2.0.
- It will require a phased in approach to get up and running and show that it works before it can expand further, and even nationally.
- The good news I believe the Pacific Northwest is the PERFECT place to implement and test TM 2.0.
  - \*The need is great, and continuing to grow;
  - \*The region and people are already connected culturally;
  - \*The presbytery executives have shown to be more connected and cooperative than in other areas;
  - \*Our presbyteries have tended to have a greater willingness to think outside the box than in other parts of the country;
  - \*Lastly, we have the ONLY current transitional training program (TMW) that is already utilizing the critical Adaptive Leadership methodology.
- I am planning to reach out to all 8 presbyteries in our region to present this model, and work to gain endorsement from as many as possible (hopefully all of them!)
- Then as we work through phases 1-3 together, we can show the rest of the West this model works, and is worthy of further adoption, as well as restructuring of both the denominational model and TM training.



## Phase 1

- Expanded conversation within Presbytery (other staff, COM)
- What would "Presbytery Endorsement" look like?
- Utilize and Encourage "Transitional Ministry Workshop" (TMW) training from Seattle Presbytery.
- Identify a Transitional Coach/Mentor.
- Consider initial "Good Health" steps.



## (My Next Step...)

- Creating a standardized Early Church Assessment Tool...

### Slide 27 – Next Steps: Phase 1

- So, this is what Phase 1 would look like for your presbytery:
  - \*Expanded conversation within Presbytery (other staff or COM as needed)
  - \*Answer the question: What would "Presbytery Endorsement" look like for [Cascades Presbytery]?
  - \*Only recommend "Transitional Ministry Workshop" (TMW) training from Seattle Presbytery (until we see expansion of training program...)
  - \*Identify a Transitional Coach/Mentor that can be a resource for your current transitional pastors, COM and presbytery.
  - \*Consider initial "Good Health" steps (changes to COM manuals to adopt "good health" standards).
    - Recognize this may require approval within stated presbytery meeting.
    - Can assist in presenting this information in additional forms if need be.
- *After my dissertation is finished this Spring, know that I'm going to begin work on my next project...*
- Creating a standardized Early Church Assessment Tool.
  - *Already have others willing to help, looking forward to what God has ahead for this!*

## Your Turn: Questions and Feedback



### **Slide 28 – Your Turn: Questions and Feedback**

- Your Turn: Welcome your insightful questions and honest feedback.





**Slide 29 – Thank You...AGAIN!**

- And THANK YOU AGAIN for your time and openness to my presentation.

# transitional ministry 2.0

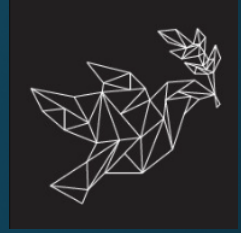


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APPENDIX B:  
TRANSITIONAL MINISTRY WORKSHOP:  
ANALYSIS FROM FALL 2019

**Introduction**

For the last 40 years, the PC(USA)'s Interim/Transitional Ministry Training<sup>82</sup> has been made available at various locations throughout the nation, at an average of 6-8 trainings a year. In 2013, I attended the "Week 1" Interim Ministry Training (IMT) at Austin Theological Seminary, at the urging of my Presbytery Executive after having already served as an Interim Pastor for over five years. My experience from this training left me with more questions than answers, and a sense that the training topics and methodology did not match the challenges my churches were facing as I led them through a time of pastoral transition. Over the years, my conversations with fellow interim pastors yielded similar reflections of concern and disenchantment with the national training.

As part of this doctoral research process, I interviewed a number of fellow interim ministry veterans and local presbytery executives regarding a number of issues surrounding Transitional Ministry. In those interviews, the concern was regularly raised that the denominational training curriculum, largely unchanged since the 1980's, no longer adequately prepares its trainees for the current challenges and types of change local congregations face. While the concern regarding the national training rose to the top

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<sup>82</sup> The Interim Ministry Education Consortium (IMEC), the group that conducts the trainings, underwent a name change in 2017, becoming the Transitional Ministry Education Consortium. The trainings have also change in name, from Interim Ministry Training (IMT) to Transitional Ministry Conferences.

of the issues revealed, a potential correction also presented itself. Rev. Scott Lumsden, Co-Executive Presbyter of Seattle Presbytery, and part of the teaching team with the IMEC for years, recognized many of the inefficiencies between training materials against the challenges faced by churches and interim ministers in his Presbytery. His teaching team, which included the Rev. Eliana Maxim (Co-Executive Presbyter of Seattle Presbytery), and the Rev. Dr. Heidi Husted-Armstrong (veteran transitional pastor), were fully on-board with Scott's vision, and worked together to create the current training model taught twice a year at the Menucha Retreat Center in Corbett, Oregon. Scott named their unique training conference "Transition Ministry Workshops" (TMW), to differentiate in name from the standard denominational training.<sup>83</sup> I was invited to attend their Fall 2019 conference to experience their updated model first-hand, and was permitted to speak with conference attendees and the teaching team.

### **Breaking the Mold**

The TMEC conducts its Transitional Ministry trainings in two parts: "Week 1" is considered an introduction to those considering or just starting in this ministry area, with teaching focused on the basics of transitional ministry, "Week 2" is more of a small group format, allowing those already in transitional ministry to work "through practical aspects of pastoring in transitional settings."<sup>84</sup> Typically, the "Week 1" training is what is required by most Presbyteries, while the "Week 2" has been seen as optional for those wanting to dig deeper. For the sake of this experience, I focused on TMW's "Week 1"

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<sup>83</sup> Scott Lumsden, interview by phone with author, Tualatin, OR, October 17, 2019.

<sup>84</sup> "Curriculum," Transitional Ministry Education Consortium of the PCUSA, accessed December 1 2019, <https://www.transitionalministryeducation.net/curriculum>.

workshop topics, as these serve as the critical training foundation for Transitional Ministry.

Scott has a God-given talent for fresh perspectives, vision and new ideas. He recognized the training model was still focused on the primary problem of forty years ago, helping churches through pastoral leadership transition. To Scott, the greater problem now is churches need transformational help; out of the old attractional model into more of a parish-based model that understands how to engage in the local community. This was a fundamental difference; thus the tools and methodology need to be changed to reflect this new problem.<sup>85</sup> The changes Scott and his team made to the traditional IMEC training materials were done to more accurately prepare potential transitional ministers (and any minister for that matter) for this new fundamental need, with the ultimate goal for a local congregation being how to become healthy and effective in a post-Christian American culture, and not simply in the hiring of their next pastor.<sup>86</sup>

My first goal was to compare and contrast my experiences between the IMT conference I attended in 2013 to this TMW conference. The following is a comparison chart of training topics from the “Week 1” IMT conference I attended in 2013, to the TMW conference I attended in 2019:

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<sup>85</sup> Scott Lumsden, interview by phone with author, October 17, 2019.

<sup>86</sup> Ibid.

**“Week 1” Interim/Transitional Training Topics**

<b>2013 IMT, Austin Theological Seminary</b>	<b>Fall 2019 TMW, Menucha Retreat Center</b>
<ul style="list-style-type: none"> <li>• I.M. Overview and Goals</li> <li>• Interim Process and Expectations</li> <li>• Developmental Tasks (1 Session per developmental task)</li> <li>• Family Systems Theory &amp; Self-Differentiation (2 sessions)</li> <li>• Role Playing</li> <li>• Conflict Management Style</li> <li>• Leadership Tools</li> <li>• Setting Goals &amp; Roadmapping the Future</li> <li>• Setting Expectations (Interviewing, job descriptions, and contract negotiations.)</li> <li>• Working with your Presbytery</li> <li>• Two Worship Session</li> <li>• One Retreat/Free-Time Session</li> <li>• <i>Total Training Length: 4 Days</i></li> </ul>	<ul style="list-style-type: none"> <li>• T.M. Context &amp; Community</li> <li>• The Elements of Change</li> <li>• Real Ministry Examples and Learned Insights (2 sessions)</li> <li>• The New Neighborhood</li> <li>• Leading a Church System</li> <li>• Leading Change: Beginning of a New Adventure</li> <li>• A Night at the Improv (role playing)</li> <li>• Are We Closing?</li> <li>• An Identity, An Idea, A Goal</li> <li>• Agile Church</li> <li>• Contracts, Covenants &amp; Final Questions</li> <li>• One Worship Session</li> <li>• One Retreat/Free-Time Session</li> <li>• <i>Total Training Length: 3 Days</i></li> </ul>

*Figure 4 — Interim/Transitional Ministry Training Topic Comparison Chart*

My first reflection was that of the significant difference in topics between the two conferences. I began with the similarities hoping to better identify where the change in methodology for the TMW began. Similarities between the two events included: IM/TM Ministry overview and expectations, understanding and leading change, uncovering church identity, goal setting, and job expectations (interviewing, contracts, length of service negotiations). Each of these areas is what I would consider a critical topic to include in the framework of these trainings, and how it differs from the typical installed pastorate.

It was within one of these shared topics, though, that the change of methodology became clear: the opening overview and expectations. With the IMT, the overview emphasized that the interim/transitional period for a congregation was largely a hand-holding process between permanent pastors, with linear developmental steps completing the process. The purpose of the interim/transitional pastor was to provide leadership to the congregation during this pastoral transition, taking advantage of what Loren Mead

had identified as a fertile time to promote and implement the positive changes in a congregation.<sup>87</sup> The ultimate goal of the interim/transitional work was the successful leadership handoff to the next installed pastor.

The TMW overview began with a hasty acknowledgment of the “traditional training model” and instead set forth a new focus of Transitional Ministry as that of “conversations toward transformation.”<sup>88</sup> Scott stated that “[While] Interim Ministry was established to help a church through a change of pastors, Transitional Ministry is a way to help a congregation move through a stage in their life.”<sup>89</sup> True to Scott’s previous assessment, he made clear the ultimate goal of converting a time of transition into a time of transformation is to help the churches we work with to discover for themselves what they need to do to become effective in a post-Christian culture. Thus, the work of the transitional minister needs to be less on following a process and more on guiding conversations and helping a congregation dream about its future. To help emphasize this point, he then introduced one of the main themes of the conference: times of transition are opportunities for adventure, and Transitional Ministers need to be “Adventure Starters” (a theme the staff would refer to frequently throughout the conference.)

After the overview, with a clearly different approach and expectation, the TMW begins to break the mold with the majority of the workshop topics diverging from the

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<sup>87</sup> Loren B. Mead, *A Change of Pastors: And How It Affects Change in the Congregation*, rev. ed. (Herndon, Va.: Alban Institute, 2005), x.

<sup>88</sup> Scott Lumsden, “Transitional Ministry Context & Community” (lecture, Menucha Retreat Center, Corbett, OR, October 7, 2019).

<sup>89</sup> Scott Lumsden, “Elements of Change” (lecture, Menucha Retreat Center, Corbett, OR, October 8, 2019).



traditional training. Instead of teaching the Five Developmental Tasks<sup>90</sup> and general transitional ministry process expectations within the denomination, the team instead jumps right into what it means to lead change from a conversational and adventurous point of view. The faculty regularly cautions the participants that this is not a formal, linear process, checking off items on a task list, but is instead a more informal process of building trust and facilitating conversation of honest reflection, question asking, and visioning. The goal is not to complete steps, but rather to create opportunities for learning and leading with the Holy Spirit, hoping that reflections on identity, ideas, and goals will begin to “pop” within the local church leadership. “If things start to ‘pop,’ that’s a sign of the Holy Spirit at work, and it’s more important than the business that’s on (an) agenda.”<sup>91</sup> Example topics are: “Beginning of a New Adventure,” “The Elements of Change,” “The New Neighborhood,” “Are We Closing,” “An Identity, An Idea, A Goal (The Anti-Mission Study),” and “How I Thought it Worked, and What I’m Really Learning.” These continue to expand the ideas of promoting healthy conversation, honest reflections of the major challenges facing churches, and visioning a healthy future, coupled with numerous real-life examples of this style of transitional ministry leadership at work, along with examples of failures with learned take-aways.

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<sup>90</sup> Roger Nicholson, *Temporary Shepherds: A Congregational Handbook for Interim Ministry* (Bethesda, MD: Alban Institute, 1998), 6-12. The Five Developmental Tasks as outlined by Nicholson are: 1) Coming to terms with history, 2) Discovering a new identity, 3) Leadership changes during an interim, 4) Renewing denominational linkage, and 5) Commitment to new directions in ministry.

<sup>91</sup> Lumsden, “Elements of Change.”

## A Deeper Look

Certain workshop topics really stood out to help ground this alternative training method and warrant a deeper look. Those workshops were, “The Elements of Change” taught by Scott, “The New Neighborhood” taught by Eliana Maxim, “Are We Closing?” also taught by Eliana, and “An Identity, An Idea, A Goal” taught by Scott.

### *The Elements of Change*

This workshop seemed to be one of the foundational classes in which Scott was clearly trying to set the tone of what Transitional Ministry should and should not be, occasionally making references to Dwight Zscheile’s *“The Agile Church,”* which appeared to be a key source of inspiration. He began this workshop by saying, “All churches and pastors are in a state of transition, not just when there’s a change of pastor. So these skills are useful in all church and leadership settings.” “God is always moving, and we need to be able to recognize where the Spirit is at work.”

Scott uses the story of the calling of Matthias in Acts 1 to set the premise for the rest of the workshop; helping congregations understand who they are and finding wholeness in Christ before they will be ready to begin a new adventure. The system won’t be able to get out of their “stuckness” until they are willing to go on an adventure, thus the work of the Transitional Pastor leading change is not only to help reframe the current reality for a congregation, but also to ask questions and lead conversations in a way that helps them become curious and willing to take on a new adventure. He shared the following graphic to illustrate the steps he takes for leading change, which always starts with building trust, and then works in a clockwise manner.



*Figure 5 — The Elements of Change*

Scott makes clear that this is less about a “process of steps” with “do’s and don’ts”, and more about taking the time to build trust and guide conversations leading to insight. This serves as the catalyst to discovering their particular purpose and thus opening their willingness to be adventurous as they seek action steps toward their future. He stated that while the old interim model was based on completing sequential tasks, this new model was based on a sequential process, meant to free the church leadership to talk, think, and try something different. This new model of Transitional Ministry was less about transitional pastors coming in as “fixers” and more about being “relational adventure starters” in a process that should continue to grow long after we’ve left that church. He makes clear this is an informal process, NOT a formal process and that not all leaders are wired to lead change in this way.

### *The New Neighborhood*

This workshop taught by Eliana Maxim came shortly after Scott's "Leading Change" workshop and provided a healthy dose of the "insight" step from Scott's Leading Change diagram for the attendees. Eliana began with a brief synopsis of the recent history of mainline American Christianity and the local church. She pointed out that a hundred years ago, churches were still parish-based and well connected to our local communities. In turn, this helped them to not only recognize the needs of the community, but to be a part of the solution as well. It wasn't until the advent of the automobile and big box stores that we began to see "destination churches with its programs and ministries." Back to the present day, as we are noticing that our culture is reverting back to emphasizing local communities, the church, too, needs to revert back to a parish-based model to remain relevant and engaged in the local community. She then shared "The Parish Collective"<sup>92</sup> as a great resource for future study, and then shared her premise: "The question used to be, 'how do we get people of our community to enter our church?' and instead a parish church needs to ask, 'how do we get the church inside the people of our community?'"

Eliana explains that if you are never part of the community, you'll never find out the needs or the places where God is already at work. The Transitional Pastor needs to help model what true community engagement looks like (as opposed to community organizing). The leaders of the local church need to be present in the community and be listening to its needs and asking questions. The problem, she states, is that churches too

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<sup>92</sup> "Parish Collective: Grow Roots. Weave Links." The Parish Collective, accessed October 10, 2019, <https://parishcollective.org/>.

often make assumptions of the community and its needs, trying to drive an idea of mission without having a full picture of what the community needs. She then gave a couple of very powerful examples of what this looked like in Seattle Presbytery when done under false assumptions, as well as an example of what it looked like when done properly, with the church leaders being present and engaged in their community.

The closing section of this workshop was very compelling. She shared statistics regarding the diversity of the Presbyterian Church worldwide, as well as statistics regarding racial diversity within Seattle Presbytery. She noted that the zip code 98118 in Seattle was home to 66 languages, more than any other zip code in the US, and in order for the local church to have a meaningful impact in the future, church leaders need to physically walk around and spend time in their communities to see the diversity for themselves. She closed with a reminder that the original church of Jerusalem was multi-cultural from the start, and that sacred diversity is a beautiful thing. “As transitional pastors, one of the greatest things we can do is help our churches flip the script from ‘how do we get people inside the church’ to ‘how do we get the church inside the people.’”

### *Are We Closing?*

This Day 3 workshop, also taught by Eliana, dealt with one of the questions that both pastors and churches think about privately but tend to be afraid of discussing in the open. She emphasized that in many cases, “fear withholds both pastors and Sessions from having this conversation until it’s too late.” On the flip side, church leaders that are willing to lead this honest conversation have, in many cases, helped their churches make healthy decisions for their future. She stated that transitional pastors need to know how to

recognize a church in decline and to begin the conversation of “change or die,” or, when necessary, to have the conversation about how to end well. The sooner decline can be identified and the conversation started, the more options that tend to be available. At the same time, the sooner a local church is deemed to be terminal, the greater the likelihood the Session can work on a legacy plan that includes laying the groundwork for rebirth or regeneration.

Eliana gave her list of the top five signs of a dying church that included: Mission of the church is survival, finances are used to keep the church open at the expense of mission, the church is inwardly focused, members of the church show hostility toward the world or community, and the church spends more time on preserving the past instead of preparing for the future. She then gave a significant list of clues to look for, pulled from Thom S. Rainer’s book, *Autopsy of a Deceased Church*.<sup>93</sup> She challenged the participants that when these signs and clues are present, it is imperative we begin the tough conversation with those church leaders to share with them they are at a crossroads and they need to make a choice: “change or die,” while reminding them that “no choice IS a choice.” She cautioned that these conversations rarely go well at first, but closed with examples of how, when the truth prevails, change or rebirth can be realized.

### *An Identity, an Idea, a Goal*

This was one of the final workshops of the conference and centered on a topic that really showed some of Scott’s passion and vision. He jokingly termed this workshop

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<sup>93</sup> Thom S. Rainer, *Autopsy of a Deceased Church: 12 Ways to Keep Yours Alive* (Nashville, Tennessee: B&H Publishing Group, 2014).

“The Anti-Mission Study” as he took aim at a particular transition process requirement he believes has done more harm than good in recent years. “No group has more mission materials than the Church. Mission Studies have been our vaccine against meaningful change.” He then states that, “(A) Mission Study is simply an exercise in projecting who you aren’t, and at the same time trying to woo a pastor who would be a match for who you aren’t, instead of who you really are.”

His antidote to the Mission Study step is not more study, but rather real leadership and honest conversation that should be led by the Transitional Pastor. “Churches already have enough ‘knowledge’ to make change, and every church knows instinctively that they need to change.” He points out that most Mission Studies avoid conflict, challenges, or tension points, and instead real leadership needs to focus on leading honest conversations that will help reveal who they really are, what’s important, and what really needs to be done for the future.

Scott then led the group through his “Anti-Mission Study” process, which is where he really put flesh on the bones of his transitional leadership premise of asking questions and leading honest conversation. First, he laid out steps to consider in preparation and trust building before deciding when and where to call for the first group meeting, which includes discerning whether to do this process with just the Session, a portion of the congregation (including lay leaders), or inviting the entire congregation to participate (if appropriate). Second, he explained how to guide the “Identity” phase, along with goals and example questions one could ask. Scott made clear the purpose of the identity phase is not to compile a technical history of the church that would go into a report, but rather helping pull to the surface the major events tied to their emotional

history (events they were proud of, or events that brought hurt or regret, times when they took risks, and ways they tried to live out the gospel.) He shared that these events will usually reveal the “stuck points” for a church, as well as help them understand who they really are as a church family.

Scott then finishes with similar explanations of how to guide the “Idea” and “Goal” phases. He says when the “Identity” phase is done well, it will naturally bring out hopes, dreams, worries, and concerns. The Transitional Pastor then must channel those things into the “Idea” phase, and Scott again offers a list of example questions to kick off that process. He also points out that in this phase, it’s appropriate for the Transitional Pastor to identify an issue and solicit feedback, but never to offer a solution. The solution ideas need to come from those participating, so they can experience the work of the Holy Spirit as well as find ownership in their ideas. Once some good ideas have risen to the surface, he makes the case that the final “Goal” step is the most important and critical piece for the leadership of the church. “How do we navigate all the way down this road to something concrete?” He gives questions to ask that help move the group to a place of making decisions for action, setting goals, designating leadership, and communicating effectively to the congregation (and to the PNC if appropriate). This is the step that finally begins to “move the needle” and allow the church to begin taking action steps toward their intended future.

Scott then closes with a word of caution and a reminder. He makes clear this process doesn’t always happen in a single meeting, that sometimes it takes a while for the group to be willing to share, and that at times the group will want to jump around between phases. But he then shared an example of what it looks like when it goes well,



and the resulting transformational change that can occur. “The process takes leadership, courage, and willingness, and will eventually lead to momentum. Our congregations desperately want pastors who can lead well, can open up the scriptures, willing to point them to adventure, and willing to lead them.” “The alternative is that they remain in the status quo, and the future of the status quo will always lead to death. So, it’s our job to lead them to life, and to a future of adventure.”

### **Critiques and Potential Improvements**

On Wednesday afternoon, at the conclusion of the workshops for that day, I had the opportunity to interact with all of the faculty, to ask questions and offer my feedback. One of the questions I posed to them was that of their familiarity of Ron Heifetz’s theory of change regarding technical problems versus adaptive challenges.<sup>94</sup> All were very familiar with it and they had consequently viewed many of the workshop topics through more of an adaptive challenge lens. Scott even went so far as to state that the TMW was based on reshaping the work of transitional ministry from the technical to the adaptive.

As I reflected on this after the conference, I realized that a significant framework opportunity was missed: in order to train transitional ministers to be agents of transformation and adventure-seekers, one of the foundational skills should be the ability to differentiate between technical problems and adaptive challenges, as well as how to vary your leadership approach accordingly. This is not only a skill that would be critical for transitional ministers but could benefit a broad range of pastors. A workshop focusing

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<sup>94</sup> Ronald A. Heifetz, *Leadership Without Easy Answers*. (Cambridge, MA: Belknap Press of Harvard University Press, 1994).

on Technical vs Adaptive Leadership should be considered as a foundational topic in the future.

Throughout the conference, I was able to speak with nearly half of the participants to find out their reflections on the TMW. What was amazing to me was that only two of the participants were aware that the TMW had a different approach and methodology. After reviewing the websites where the TMW is advertised,<sup>95,96</sup> the conference description did nothing to differentiate itself from the traditional IMEC/TMEC national trainings. Most of the participants learned of the alternative approach of the training after experiencing the workshop, with many wishing they had known ahead of time and could have invited others to participate. If the TMW approach is going to have the hoped for effect by Scott and his team, then moving forward, proper communication and targeted advertising within the denomination is going to be critical.

One of the final critiques is relevant to the tools for helping a church connect (or re-connect) with their local community. Much was discussed about moving back to a parish-based model, how to engage the church leadership in productive conversations about connecting with their community, and how to instill a sense of adventure for the church's future. These were all tools for working on the internal processes of the local church, and what was missing were tools for working on the external process (outside of the church and into the community). While the suggestions to take teams and walk the community and talk to neighbors was good, many of these trainees will need tools to

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<sup>95</sup> "Sites." The Transitional Ministry Education Consortium of the PCUSA, accessed December 9, 2019, <https://www.transitionalministryeducation.net/sites-2>.

<sup>96</sup> "Transitional Ministry Workshop." Menucha Retreat and Conference Center, accessed December 9, 2019, <https://menucha.org/programs/tmw/>.

identify community demographics and population trends, to uncover community leaders and pinpoint appropriate community needs in which the church can engage. An additional external skill for transitional pastors would be how to model conversations with neighbors and local businesses to see how the community views the church. While the surface was scratched on this in “The New Neighborhood,” these tools seemed necessary to teach to instill a purpose and skillset the participants could readily utilize in their future ministries.

### **Conclusion**

My current thesis claim is that I believe the retooling of the Transitional Ministry model, from training to position types, will help churches and Presbyteries with better expectations and more accurate pastoral placements. My hope in attending TMW was to experience one element of my claim (training) in action, and to determine what effect this modified teaching approach to transitional ministry was having in addressing the modern challenges facing local churches. There is a common saying, “The first step is always the hardest.” For all the years of conversation and articles pointing to the current deficiencies of the national training, the TMW has taken that first step in correcting the problem. While it is young in its formation, the early results and budding excitement point to a positive future. Other regional Presbytery executives have begun asking for this training in their areas, showing a growing understanding of its potential. TMW has taken that first and difficult step, and from this I see the potential for greater receptivity for a more complete retooling of the Transitional Ministry model in the future.

## APPENDIX C:

### SOFTWARE DEVELOPMENT AND VERSION NUMBERS

At the time I am writing this, my Apple iPhone just displayed a message saying my phone software was ready to be updated to iOS 14. For those of us working with technology at any level, we've become somewhat familiar with the language of the world of technology. Whether it's an update to an operating system, major software, or even our favorite mobile apps, we've become used to seeing version numbers after the program titles, either signified by an increasing number or tied to the calendar year of release.

So, what is the purpose of these software version numbers, and why are they so critical to the identity and use of the software? At home, I have an original Apple Macintosh computer (Model M0001) that my father was given back in 1984. The reason? As a successful architect with an early comfort level working with computers, he was selected to join other architects who would test a new computer program called AutoCAD by the then start-up company Autodesk. The company had just released version 2.0, but the software engineers needed more real-world situations for testing and improving the program. After my father's testing and reporting on everyday use of the program as well as programming issues (i.e., bugs), software engineers would then combine his information with the other testers before making modifications to the program for the next major update. AutoCAD has become one of the standard programs for computer-assisted design, and in comparison to 1984, AutoCAD 2021, which was

released in March of 2020, is effectively version 24.0 of the original AutoCAD program that my father helped test.<sup>97</sup>

A lot has changed in 35 years, both in hardware and software capabilities, as well as in the needs of the software users. As the world changes, so, too, must the software to keep up with modern demands. So, as software developers and engineers work to improve their products and update their software to the changing needs of their users, they utilize software version numbers to indicate the progress of their software over its lifetime. The purpose of software version numbering is to “indicate the degree to which a version has been changed.”<sup>98</sup> Major changes to the software are usually indicated by a change of the first digits of the version number (2.0, 24.0, etc.) or by adding the year of the newest software release (2016, 2020, etc.). More minor changes to the software are then indicated by changing the digits on the right side of the period (2.1, 24.2, etc.).<sup>99</sup>

The purpose of major software revisions is to improve the functionality and usability of the software to match the changing needs of the user. Major version releases also send the signal of previous version incompatibility to meet current needs. Essentially, as the world changes, so, too, do the needs, and thus improved solutions are required. The same is now true for Transitional Ministry. The original model that Mead masterfully created over 40 years ago has run its course, and as the world has changed, so, too, have the needs of both the local churches and their governing bodies. The original

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<sup>97</sup> “AutoCAD Version History,” Wikipedia, last modified July 7, 2020, [https://en.wikipedia.org/wiki/AutoCAD\\_version\\_history](https://en.wikipedia.org/wiki/AutoCAD_version_history).

<sup>98</sup> Kelly Morrison, “A Guide to Software Version Numbers,” Praxent, last modified November 10, 2017, <https://praxent.com/blog/what-do-software-version-numbers-mean-a-guide-to-understanding-software-version-conventions>.

<sup>99</sup> Ibid.

version is becoming increasingly incompatible with current needs. It's time to introduce a major revision to the original program: Transitional Ministry 2.0.

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