



The United Methodist Church
of Greater New Jersey

New Disciples • Vital Congregations • Transformed World

2017 Overview of
Pastoral Transition Process



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The United Methodist Church of Greater New Jersey
Transition Workshop Agenda
 Saturday, April 29 | Friday, May 5, 2017

	<u>April 29</u>	<u>May 5</u>
9:00 AM	Registration & Fellowship	
9:30 AM	DS Gina Hendrickson	DS Gina Hendrickson
9:35 AM	DS Drew Dyson	DS Drew Dyson
	Effective Transition Theology and Philosophy of Change vs. Transition Transition in the Itinerant System	
10:00 AM	DS Varlyna Wright	DS Varlyna Wright
	Planning For Effective Transition Out Transition Is a Team Effort (Engaged in 3 Stages) Departing Pastor's Role (Exiting with Excellence) Congregation's Role (Grace-filled send-off) Practices (For returning to a previous appointment)	
10:15 AM	DS Steve Bechtold	DS Steve Bechtold
	Transition Team's Role (18 th month journey together) Setting things in order to prepare for the incoming pastor Establishing records, information, calendars Planning for the nuts and bolts of the move Highlight the Info-Pak as a guide Completing the Transition Audit	
10:30 AM	DS Gina Kim	DS Gina Kim
	<i>Team Discussion</i> (church team and current pastor) What will your team do to prepare for an effective transition? What church issues need to be followed closely during the transition? Are there parsonage issues to be addressed prior to the incoming pastor's arrival? Are there church office or pastor's office issues that need to be addressed? Who will take charge of assembling the information? What help is needed to assemble the information?	
11:15 AM	Bishop John Schol (Video)	Bishop John Schol (Video)
	Entering Into a new ministry Identifying and understanding expectations Clarifying appropriate expectations One to one meetings Small group house meetings Periodic Check-ins Quarterly Report (pastor & SPRC each complete, discuss & submit)	

Pastoral Transition Process for Congregations

12:00 PM	Getting ready for the incoming pastor's entry <i>Lunch and Team Discussion</i> What is a good day for an installation service and reception? Who will take charge and who will assist regarding details?	DS Brian Roberts	DS Brian Roberts
12:45 PM	<i>Team Discussion</i> (church team and incoming pastor) Who are the key elected leaders and perceived leaders that the pastor should meet with? Who will arrange for the small group house meetings? How many one to one meetings are appropriate for your church? How many house meetings are appropriate for a church your size?	DS Myrna Bethke	DS Myrna Bethke
1:15 PM	Q&A Wrap-up Sending Forth	DS Gina Hendrickson	DS Gina Hendrickson

Teams may remain for further discussion.

Pastoral Transition Process for Congregations

Introduction

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

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

The Cabinet is requesting all congregations that will have a change of pastors in 2016 to participate in a Pastoral Transition Process in order to:

- ❖ Understand the issues involved in a pastoral transition
- ❖ Provide for a positive exit process for the departing pastor
- ❖ Prepare to receive the incoming pastor
- ❖ Utilize this period of openness to expand their vision for their future
- ❖ Develop an understanding of the issues that the new laity / clergy team need to address

Developing a Transition Team

Each S/PPR Committee is expected to help the congregation to form a Transition Team, as soon as the announcement of a change of pastor is made. The Transition Team will be responsible for managing the transition process. It will be their responsibility to plan for and manage the transition related to issues being faced by the congregation. It may include persons from the trustees, program ministries, worship, SPRC persons as well as others who have good insight into the nature of the congregation, whether or not they have a current leadership role. The team will include the incoming pastor. The current pastor will be a consultant to the committee.

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

The departing and incoming pastors shall serve as consultants to the committee and attend the training but should not provide sole leadership for it. The team will serve from now to the conclusion of the first year's review.

Associate/Assistant Pastors

Pastors and churches must take into account that unique consideration must be given when applying the topics in this manual to the work of Elders, Provisional Elders, Deacons and Provisional Deacons, Associate Members, and Licensed Local pastors who are serving in the role of “assistant” pastors.

Most of the content of this manual applies to all persons who are under appointment, but there are clearly some tasks and responsibilities that belong to the “pastor-in-charge”/“Senior Pastor” in any appointment. There are certain district and conference reports that are under the direction of the pastor-in-charge. The pastor-in-charge is responsible for the general oversight of the church.

Those who serve as associates/assistants, regardless of their title and job description, serve as part of a team ministry. They serve under the supervision and direction of the “Senior Pastor” in any appointment. Such appointments are made in order to form a team that will work with the pastor to carry out the expectations of growing more vital congregations. The entire staff relates to the congregation through the SPRC. The entire appointed staff is amenable to the Bishop, the District Superintendent and the Annual Conference structure.

The day-to-day assignments and scope of ministry of associate/assistant pastors is determined through a job description, which is to be developed in a cooperative effort among the Senior Pastor, the SPRC and the District Superintendent. Often such pastors are assigned to work in specific areas of ministry, but they are not “independent” in their role in the church. They should be in regular contact and conference with their supervisor and the rest of the church staff.

Job descriptions should be used to guide the work of any associate/assistant pastors in a staff. The job descriptions should be specific enough to indicate the outcomes expected from the assistant pastor’s actions. Hours worked, actions required, specific directions, and the process of periodic review should all be in the job description. The job description should reflect an attempt to achieve the highest possible results, consistent with the pastor’s skills and experience, and based on the needs of the congregation. Job descriptions may be adjusted periodically, based on experience and changing opportunities.

Allowing for developing some minor adjustments, following the guidelines of the workshop material in cooperation with the transition team, is the responsibility of every person under appointment. Evaluations should be based on achieving the expectations set forth in the job description. While some items will not be applicable to an associate/assistant pastor, surely the need for periodic review is highly important. This workbook gives guidelines for quarterly check-ins as part of the appointment process.

Frequent conferencing within the ministry team of the church, and continuous participation in the connectional ministry opportunities are important in the ministry of every appointed man or women, regardless of their assignment. Specific questions about the implementation of provisions of this workbook should be directed to the supervising pastor and District Superintendent.

Steps in the Transition

1. Consultation Process with the S/PPRC

The transition began last fall when your church submitted its Church Profile/Church Advisory for Appointment Making. The profile should be updated every year. This process continues as the SPRC communicates and connects with the DS if a meeting is requested (via Meeting Request Form). This process may include an opportunity for the congregation to provide feedback to the SPRC.

2. Introduction Process For A Transition Into a New Appointment

- A. The District Superintendents contact a pastor for a consultation on the possibility of a change of appointment.
- B. If the decision is made to make a change, the pastor is informed of the new appointment.
- C. The pastor is given a memo with all the information available to the DS, including the Church Profile, the compensation package, and information regarding housing.
- D. The pastor and DS negotiate the list of those with whom the pastor may confer in making a decision to accept or reject the appointment.
- E. The pastor is given 24 hours to prayerfully consider the change of appointment.
- F. If the decision is made to proceed, the church receives a memo with all the appointment information and the DS arranges for an Introduction Meeting with the S/PPRC.
- G. The DS meets with the incoming pastor (and the spouse) for an informal confidential gathering, usually this is a meal, outside the church setting.
- H. The DS introduces the incoming pastor with the current pastor, if possible at the parsonage (but in any case a tour of the parsonage is arranged).
- I. The DS meets with the S/PPRC and shares relevant information about the incoming pastor, including information on the Pastor's Profile. The DS and S/PPRC consult on any issues that arise.
- J. The incoming pastor (and spouse) are introduced to the S/PPRC.
 1. The District Superintendent opens the meeting with a prayer.
 2. Biographical data and ministry history is shared.
 3. Reasons for the appointment are discussed.
 4. SPRC members are given an opportunity to introduce themselves and the church. The incoming pastor introduces him/herself to the SPRC.
 5. The SPRC and Pastor are given an opportunity to enter into brief dialogue as to hopes, dreams, goals, benchmarks and expectations. This discussion is designed to develop basic information for the Appointment Covenant.
 6. The DS steps out with the incoming pastor for further consultation.
 7. The SPRC discusses the information that has been shared.
 8. The DS dialogues with SPRC for further consultation.
 9. If no missional reasons are discovered that would cause the appointment to be reconsidered, the DS brings the pastor back into the room and announces the intention that he/she will be the incoming pastor.
 10. The DS briefly reviews the compensation package, the transition process, the formation of the transition team, the dates of the transition workshop, the policies regarding moving, and the need for either party to notify the bishop's office in writing by 9:00 AM the next morning if there is a desire to object to the appointment.
 11. The DS asks the incoming pastor to close the process with prayer.
- K. The DS texts or emails the bishop and cabinet to inform them of the results of the meeting.

- L. The DS sends the S/PPRC Chair the announcement to be shared with the church.
- M. An Appointment Memo is sent to the pastor and S/PPRC Chair, documenting details of the change of appointment.
- N. DS submits a Change of Appointment form.
- O. An announcement is made in the receiving and sending churches and on the conference website announcing the appointment.

3. Exiting Process

- A. The DS contacts the current pastor's church and arranges an S/PPRC meeting.
- B. The DS and current pastor attend the S/PPRC meeting and announce the change of appointment.
- C. The DS, pastor and S/PPRC share a brief time in which there is a review of the transition process, including handling the moving, parsonage issues and plans for ministry between the announcement of the change of appointment and the change.
- D. The DS consults with the SPRC and reviews Memo and expectations for the incoming pastor. Measurable benchmarks are discussed.
- E. Parsonage issues are discussed and preliminary plans are made for any needed actions.
- F. Salary, expense account, vacation and all compensation, issues are clarified.
- G. The DS provides an announcement for sharing the news with the church.
- H. Contact information is updated, in order to arrange for future meetings.

4. Pastoral Transition Workshop for the Team

This workshop will introduce the team and incoming pastor to phases of a pastoral transition, assist the team to develop an appropriate strategy, introduce resources that can be used to implement that strategy, and begin to develop benchmarks, a time line, responsibilities and an evaluation process. The transition workshops will be April 29th and May 5th at the Mission and Resource Center, 205 Jumping Brook Road, Neptune from 9:00 a.m. to 1:45 p.m.

5. Transition Planning

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

6. Exit Interview with Departing Pastor

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

7. Preparation for Entry / Startup with Incoming Pastor

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

8. Upgrading Pastoral Leadership Skills

The SPRC, Incoming Pastor and DS consult regarding needed training that will enhance the incoming pastor's skills, in order to empower him/her to achieve benchmarks of ministry that have been established. A plan to develop clergy excellence will be formulated. These are usually included in the appointment memo.

9. Upgrading Congregational Skills

The SPRC, Incoming Pastor and DS consult regarding needed training that will enhance the congregations skills in order to achieve the benchmarks of ministry that have been established. Recommendations regarding utilization of conference resources to strengthen congregational ministry are usually included in the appointment memo or discussed with the S/PPRC

10. The Appointment Memo Is a Valuable Tool

An Appointment Memo is created by the District Superintendent and it is delivered to the Church and the Pastor. It includes:

- A. Identification of the specific appointment
- B. The starting date of the appointment
- C. The complete compensation package, including insurance, pension, expense allotments, fringe benefits, reimbursable expenses and other details
- D. Housing arrangements
- E. Moving dates
- F. Expectations regarding availability and condition of any parsonages
- G. Specific appointment expectations are in the written Memo
 - 1. The District Superintendent's expectations of the pastor and church
 - 2. Defined benchmarks for achieving specific priority goals
 - 3. Timelines for achieving said goals
 - 4. Expectations of the church and pastor for developing a greater level of skills to empower achievement of the stated goals
 - 5. A plan for developing pastoral and congregational skills

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

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

As part of the strategy set forth in the Strategic Planning document, each church will be asked to do a self-assessment in the coming year. The results of that self-assessment will help the church and pastor to evaluate the progress they are making.

Three Stages in Engaging Transition

1. Exiting with Excellence

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

2. Entering with Energy

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

3. Engaging with Enthusiasm

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

Bold Thoughts on Exiting with Excellence

Exiting with Excellence (Current Pastor)

Pastors by this time have done almost all of the effective ministry they could hope to do in a specific appointment. It is time to leave the church to the congregation and the next pastor.

Some of the things that help in an effective leave taking are:

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

Saying Goodbye and Coming to Closure

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

It is natural that laity and pastors find it hard to risk forming new relationships – even with their incoming pastor. Having said these things, it is still true that there can only be one shepherd of any flock. A pastor needs to have the opportunity to lead in order to make a positive impact on a congregation. Each pastor has his/her own gifts and graces to share. Each will add something to the ministry of the congregation. There is a great challenge to “let go” and “go on” but such conduct is important if we are to continue healthy ministry in the years ahead.

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

Providing for Pastoral Leadership Change

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

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

***Idea Mart:** On her last Sunday with her congregation, a Pastor took off a stole and placed it on the altar. She asked that the stole be presented to the incoming Pastor on his/her first day, as a symbol of the continuing ministry of the church in the connectional fellowship.

Returning to a Previous Appointment

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

Steps to Exiting with Excellence (Current Pastor)

Overview

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

Exit Interview

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

Who participates in the exit interview?

Participants should include the pastor, the SPRC, and a few key leaders of the congregation. It is not a congregation-wide event.

When should the interview take place?

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

What should the setting be?

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

What is the format for the exit interview?

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

The agenda might include:

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

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

Parsonage Issues

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

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

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

Grace-filled Send-off

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

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

Administrative Matters – All issues are open for discussion

SPRC may want to help current pastor with these tasks

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

Pastoral Care / Status of Congregation

Assist the current pastor in preparing notes for pastoral care needs

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

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

Moving Plan for Current Pastor

- ❖ Assist in planning for the move, set dates, budgets, movers, etc.
- ❖ Help make the moving process smooth

SPRC Responsibilities

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

Exercise

Table discussion with Transition Team and Current Pastor

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

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

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

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

- ❖ Who will take charge of assembling the information?

- ❖ What help is needed to assemble the information?

Bold Thoughts on Entering with Energy (Incoming Pastor)

Entering with Energy

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

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

Entering with Energy (Incoming Pastor)

Overview

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

Preparing for Incoming Pastor

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

Planning for the Move In

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

Welcome

- ❖ Plan worship for first Sunday
 - Incoming Pastor and his/her family is introduced
 - Incoming Pastor is freed from leading worship on first Sunday
 - Incoming Pastor should be part of the planning of this service, i.e., who will preach, issues around communion, etc.
- ❖ Welcome reception

Orientation to Church, Office and Church Records

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

Introductions to Congregation

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

Introductions to Community

- ❖ Provide information on basic community resources
 - Identify potential doctors, dentists, etc.
 - List of baby-sitters (if appropriate)
 - Shopping hints
 - Places to eat
- ❖ Plan for introducing pastor to other area pastors
- ❖ Plan for introducing pastor to community leaders
- ❖ Introduction to school personnel (if appropriate)
- ❖ Introduction to hospitals and nursing homes

Team Building Process

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

Bold Thoughts on Engaging with Enthusiasm

Engaging with Enthusiasm

- ❖ Help the incoming pastor to locate his/her place in the church and clarify initial problems needing attention.
 - Select an appropriate and compatible management style among a range of options
 - Define initial responsibilities
 - Select management procedures
 - Identify major issues
 - Make the transition from the former pastor
 - Allow time for input
- ❖ Mutual Testing - Learn to work effectively in the incoming pastoral relationship.
 - Mastering job basics in the new situation
 - Building mutually supportive relationships
 - Building a new frame of reference
 - Mapping the players and the networks
 - Locating ourselves in the networks
 - Learning the vernacular
 - Accessing organizational functioning
- ❖ Mutual Acceptance – Pastor and congregation will move toward the realization of shared ministry and common life.
 - Crossing the inclusion boundary
 - Crossing the authority boundary
 - Accepting the congregation, quirks and all – Accepting the pastor quirks and all
 - Negotiate, evaluate, and re-negotiate mutual expectations
 - Dealing with resistance
- ❖ Job/Role Planning - Develop the local church as a vital and effective instrument of ministry and mission.
 - Building a common vision of a desired future for this local church
 - Clarifying work responsibilities
 - Selecting the key result areas, including benchmarks and timelines
 - Clarifying priorities
 - Building a plan of operation
 - Providing for strategic planning
 - Building support systems around innovators

Engaging with Enthusiasm in a New Ministry

Identifying, Understanding and Clarifying Expectations

- ❖ **What is an expectation?** A strong belief that something will happen
- ❖ **One to one meetings**

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

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

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

 - Share a hope you have for the congregation?
 - Share one concern you have?
 - What is the next important step we should take to fulfill our mission?
 - What are your expectations for our ministry together?
 - What questions do you have for me?
- ❖ **Identify your first six month goals** and share them with the staff parish relations committee and the superintendent and invite their feedback.
- ❖ **Identify your 2018 goals**, following your one to one and small group meetings, and share them with the staff parish relations committee and the superintendent.
- ❖ **Periodic Check-ins** – During the first year, the pastor and the staff parish relations committee are to meet quarterly to:
 - Provide updates on ministry
 - Identify what is going well and why
 - Identify challenges and how the challenges are being addressed

- Clarify and establish reasonable expectations

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

Exercise

Table discussion with Church and Incoming Pastor

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

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

❖ Who will arrange for the small group house meetings?

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

Resources for Your Transition Team

The next several pages provide resources that you will be able to use in leading your congregation in the transition that has already begun.

Included are:

Pastoral Transition Audit	22
Quarterly Check-In Report	24
INFO-PAK	26
Some Interesting “Conversation Topics” for Church Groups	27
50 Ways to Welcome your New Pastor	28
A History Sharing Experience	30
Special Services	31

Church Name: _____

Pastoral Transition Audit

The pastoral transition audit is designed to establish a baseline for new ministry and to help ensure that there is an appropriate accounting for ministry. The following questions are to be completed by the new pastor in consultation with the former pastor and emailed to the district superintendent by July 1. If you are an associate pastor, the senior pastor is to complete the form and review it with the associate pastor. An updated report should be provided by September 1, 2017.

1. Average worship attendance reported in the statistical report submitted to the conference for 2016.

Average worship attendance for the first six months of 2017. _____
2. How often did the Staff Parish Relations Committee meet during 2016? _____
How many times has it met since January 1, 2017? _____
3. How often did the Church Council meet in 2016? _____
How many times has it met since January 1, 2017? _____
4. Does the pastor have a discretionary account? Yes No
If yes, was there an internal audit by the Staff Parish Relations and Finance Chairpersons of the accounting at the time of the pastoral transition? Yes No
If no, an audit is to be conducted immediately.
5. What percentage of shared ministry was paid from January 1 to June 30, 2017? _____
6. What percentage of direct bills (pension, health and property insurance) was paid from January 1 to June 30, 2017? _____
7. What percentage of shared ministry and direct bills are anticipated to be paid by the end 2017? _____
8. Are there any financial concerns within the congregation? Yes No
If yes, please describe.

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

Definitions:

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

Level Two: The focus shifts from solving the problem to caring for myself. People feel, we've got a problem to fix, but I don't want to be associated with it. I'm going to be cautious, armor myself, plan before I talk to the pastor. I'll talk with other people, but not share fully all I know about the situation. People are nervous, which you can tell

because they generalize everything: "We're not communicating. There seems to be low trust around here. There are some difficulties with the choir." But they don't describe the problem specifically. The role of the pastor, then, is to get people talking.

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

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

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

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

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

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

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

10. What additional information is it important for the superintendent to be aware of?

Name of Church: _____ Date Submitted: _____

Name of pastor reviewing the form: _____

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

yes no

Names of church leaders who have reviewed the form:

SPRC Chairperson

Outgoing Pastor

Incoming Pastor

A copy of this report should be provided to the outgoing pastor, the incoming pastor, the SPRC and the District Superintendent by July 1, 2017. An updated report should be provided by September 1, 2017.

Quarterly Check-In Report
(Please Return Electronically to Your District Office)

Important:

Pastor and S/PPR will complete and submit separate Quarterly Check-In Reports.

Please submit the first Quarterly Check-In Report on 9/30/2017 and at the end of each quarter thereafter to the Regional Office.

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

Church Name: _____

Pastor Name: _____

S/PPR Name: _____

Place the number that appropriately corresponds with your view.

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

EVALUATION AREA	9/30/17	12/30/17	3/30/18	6/30/18	9/30/18	12/30/18	3/30/19
Understanding and Relationship Building							
A sufficient number of introductory small group meetings have been held with laity.							
The Pastor has conducted one to one meetings with key church leaders.							
The Pastor is connecting well with the congregation(s).							
Expectations							
Fruitful conversations with SPRC and Church Council have been held about expectations.							
The Pastor understands the expectations of the congregation.							
The Pastor is meeting the church's expectations.							
Initial six month objectives were set and are being worked							

Pastoral Transition Process for Congregations

EVALUATION AREA	9/30/17	12/30/17	3/30/18	6/30/18	9/30/18	12/30/18	3/30/19
on or are completed.							
12 month congregational goals have been set for the up-coming calendar year.							
Progress is being made on the 12month goals.							
12 month goals are appropriate for moving the church towards vitality.							
Quarterly evaluations have been completed in a timely manner.							
Fruitfulness							
Worship attendance is growing.							
We are seeing more visitors.							
More people are attending small group and Bible studies.							
More people are engaged in community ministry.							
Giving has increased.							
Comments: Please enter below, including date.							

INFO-PAK

(Information for the Pastor's Action Kit)

Every pastor who is leaving a church, along with the Pastor (Staff) Parish Relations Chairperson, is responsible to supply the following INFO-PAK to the incoming pastor. These items should be available as soon as possible, in order to facilitate a smooth transition.

Church Documents:

Alphabetical membership roles with address, phone, and email information.
Updated 2017 Directory of Officials, (with contact information and updates of most recent elections)
2015 and 2016 Church Conference Reports
2015 and 2016 Year End Statistical Reports
2015, 2016 and 2017 Budgets & Treasurer's Report & 2017 to date (Later updated to June 30th)
2016 Detailed Attendance & Stewardship records & 2017 to date (Later updated to June 30th)
A summary of attendance and stewardship records for the last 5 years.
2015 and 2016 Financial Audits & Complete Current list of all accounts and liabilities
2015 and 2016 Worker's Compensation Audits
Pastoral Transition Audit

Pastoral Contact Information

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

Information for Conducting Church Business

Detailed staff information (people, hours, job descriptions, etc.)
Complete set of labeled keys, combinations, codes
All codes and passwords (fire, alarms, computers, etc.)
Equipment & supplies information
List of services supplied to church and parsonage (with contact information) & all church contracts
Church petty cash, church accounts, discretionary accounts and charge cards information
Church calendar – with special emphasis on previously planned events
2016 & 2017 Bulletins (typical, communion, holidays, special Sundays) (guest & emergency preachers)
2016 & 2017 Church newsletters, congregational mailings and e-blasts.

Helpful Neighborhood Information

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

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

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

A. What is the context of our ministry?

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

B. Identity

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

C. Program / Ministry

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

D. Process

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

E. Helpful Information

1. What do the census studies say about our ministry opportunities?
2. Church data – who really “knows” and how is information shared?
3. What are the programs of our church and who makes it happen?
4. What are Our Stories?
5. Interviews with community leaders – Who do they say that we are?

6. Do we have an inventory of present and potential leadership (a talent bank)?



50 Ways to Welcome your New Pastor or Associate Pastor

From the Lewis Center for Church Leadership Prepared by Robert Crossman

Prepare to welcome your new pastor

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

Say goodbye to your current pastor in a healthy way

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

Make things move-in ready

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

Welcome your pastor on moving day

- 21. Stock the parsonage refrigerator and pantry with some staples.
- 22. Make sure there are kid-friendly foods and snacks in the refrigerator if children are arriving.
- 23. Have a small group on hand to greet the new pastor and family when they arrive and to help as needed.
- 24. Offer child care if there is an infant or toddler in the household.
- 25. Invite children in the household to do things with others of their same age.
- 26. Welcome any youth in the household by having church youth group members stop by and offer to show them around.

Continue the welcome during the entry period

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

Help the new pastor become familiar with the congregation

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

Help the new pastor connect to the community

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

A History Sharing Experience

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

- a. Assists the inclusion process. The pastor becomes one of us when he/she knows our stories.
- b. Shares key events in the life of the church.
- c. Provides insights into past successes and failures.
- d. Informs all to the pastors of the past and who in particular is the one by whom the current pastor will be judged.
- e. Assists the incoming pastor and leaders to assess what the meaning of all of this is for the congregation.

Arrangements:

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

Process:

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

Special Services

Farewell Service:

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

Installation Service:

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

Re-Appointment Service:

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

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

* Farewell p. 598-599

* Installation p. 595-598

* Re-Appointment p. 595-598

Notes

Notes

2017 Transition Workshop Assessment and Commitment

1. What particularly helpful information and insights have you gained in the workshop?
 - a. From the handout:
 - b. From the speakers:
 - c. From our table discussion:
 - d. From your own reflection:
2. What do I commit to share in my local church?
 - a. In our transition team:
 - b. In the larger congregation:
 - c. With my current pastor:
 - d. With our incoming pastor:

