

Liberty University

**Pastoral Leadership: The Importance of Succession Planning
Development and Transition in Our Local Churches**

A Thesis Project Report Submitted to
The Faculty of the School of Divinity
In Candidacy for the Degree of
Doctor of Ministry

Department of Christian Leadership and Church Ministries

by

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THE DOCTOR OF MINISTRY THESIS PROJECT ABSTRACT

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A pastoral succession plan will address the issues of who will be responsible for leading the respective congregation if something happens to the current Pastor. Without clear direction, leaders leave their flocks in precarious positions. The problem is that churches may not have a concise succession plan to identify a qualified leader to take up the leadership mantle. The study will lay the foundation from a biblical perspective on the importance of identifying a leader's successor and the advantages of providing a smooth transition for the assembly. The research will stress the importance of pastors not only identifying their successors but having a clear transition strategy that has been vetted and approved.

The researcher will conduct online surveys and interview pastors regarding their succession plans. The study will address the role church governance plays if the current leader is incapacitated or unable to carry out their pastoral leader responsibilities. The data collected and analyzed will compare how succession planning has been utilized and its impact on successful leadership transition. Data analysis and interpretation will address the importance of proper transition planning and provide a template for leadership succession planning.

Keywords: Pastoral Leadership, Succession Planning, Succession, Transition, Qualitative Research, Leadership

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Undertaking a project of this magnitude has been an interest since I began my master's graduate studies at Regent University. I am grateful for the opportunity to finally see it to fruition.

First, I honor God, who is the head of my life. It is through His grace, mercy, and strength that I have completed this assignment. He gets all the Glory.

As I present this project, it is my prayer and hope that as leaders, we invoke thoughts to leave a legacy for the next generation of pastors. Not for the moment, but to prepare the next generation of leaders to lead the church to fulfill the great commission as mandated by our Lord and Savior, Jesus Christ. I pray that many will set aside fears, and their egos, and come together for the benefit of the next generation of leaders who bear the awesome responsibility of shepherding the flock. We need your wisdom, experience, and insight to help us edify the Kingdom of God

To Stephen, my heart and joy. What can I say? You are my greatest accomplishment. Thank you so much for the sacrifice and encouragement I needed to complete this when I felt like giving up. Mommy loves you!

Those fellow servants in ministry, you know who you are; thank you for your prayers, words of encouragement, and the occasional push to complete this project despite the distractions.

To pastors and ministry leaders, please open up the lines of communication regarding leadership transition and succession planning. The mission of the church must never die.

May God Bless Each of You

Chapter 1

INTRODUCTION

Today's leaders bear the responsibility of being the visionaries of the organizations or ministries they lead. In addition to outlining organizational vision, goals, and mission, a capable leader must focus on the organization's future. Therefore, leaders ensure organizational success and continuity when addressing the vision and goals. However, many leaders may not consider the implications to the organization if leadership is disrupted. Such disruption may come as illness, death, or the leader decides to leave the organization altogether. The issues stemming from leadership upheaval in many instances will hurt the organization in question, especially if the planning of leadership succession and transition has been ignored.

Succession planning is not centric on the church environment. Succession planning must be addressed in any instance where leadership is a priority. Current leaders will inevitably pass the baton of leadership on in one instance or another. Thus, they should discuss the best way to prepare the organization for their departure. It is not a matter of whether such an occurrence will happen, but when. An organization that is prepared for the departure of an executive (or leader) is better positioned for future success and its ability to provide ongoing services to the community.

The subject of leadership succession and transition has been of great interest to the researcher for quite some time. Many pastors under whom she has sat and ministered did not prepare their leadership teams and congregations for another leader in the event of their departure. Many pastors share the notion that they will 'die in the pulpit' preaching or that retirement as a pastor is unbiblical. However, this is unrealistic both from an administration and biblical perspective. While many would love to step into glory with the Lord's word on their lips,

it would leave a gaping hole in the congregation who witnessed the event and the leaders trying to figure out what comes next once the shock and grief are over. In the area of retirement, there is a difference in retirement from the position of pastoring versus from ministry altogether.

Interestingly, many leaders take the time to prepare for the longevity of their businesses in the business world. They seek to ensure their business maintains its profitability to continue prospering to the extent that they intentionally identify and prepare their successors to carry on their 'legacy.' This mindset is the exact opposite in the Body of Christ, especially in our African American churches. As a result, there is a disparity in handling leadership changes, especially where the spiritual health of the church and its members lies in the balance.

The researcher is interested in how other church leaders have felt about passing the baton of succession to someone within or outside the local assembly. She has witnessed pastors who get sick and are unable to lead. Even in their sickness, they refuse to relinquish the mantle so they can recuperate and heal while ensuring the congregation and administration of the church are left in capable hands. As a result, the church leadership team is left scrambling with what to do and how to effectively lead the congregation in the event of the untimely death of the Senior Pastor. Even while a master's student at Regent University, she expressed an interest in researching how leaders can effectively transition leadership roles in a manner that would minimize disruption to the congregation and the ministry.

Research is important to investigate from the perspective of how leaders are preparing the next generation for leadership within our local churches. Many churches' leadership (i.e. pastors or bishops) who are older haven't brokored the topic of leadership succession with their leadership teams, or boards for that matter. A pertinent question to this generation is "have you prepared the next generation for leadership?" Who is prepared to take over the administration of

the church if and when the position of pastor is vacated? What drives pastors to continue to pastor or lead without having anyone in line to take over?

The Moses Effect

Each pastor will be faced at one time or another with the notion that as they age, there will ultimately come a time to turn the ‘reins’ over to a younger generation. Inevitable there are instances where our older seasoned pastors have stayed in the pulpit past their time. This is what the researcher describes as the ‘Moses Effect’. If we look at the life and leadership of Moses, there was a time during Israel’s history when his leadership skills were necessary to lead the Israelites from Egypt to the Promised Land. The times which Moses faced Pharaoh, he faced as a diplomat. However, as Joshua succeeded him, Israel required a ‘warrior’ to conquer the land of Canaan. Each leader has a time and season in which they can be successful in leading and ministering to the congregation they are entrusted with. The importance of a great leader is to discern the time in which they need to pass the mantle or baton of leadership on to a successor who is equipped to move the congregation or ministry to the next chapter of their spiritual lives.

The researcher is not saying that a pastor has to die for a transition to take place. But she does feel that many leaders have what she calls the ‘Moses Effect’. The ‘Moses Effect’ is where church leaders (pastors for the premises of this project) are 70 years and older who are in the church the leadership along with their corresponding Board of Elders and/or Board of Trustees who have the mindset they will occupy those positions forever. They have not given thought to looking to and preparing the next generation of leaders who will occupy those positions after them. Please do not misunderstand the intent of the researcher here. There is no age limit or when pastors should move from the position of pastorship. However, if we evaluate the relationship between Moses and Joshua during their respective times of leadership in the nation

of Israel when you saw Moses, you saw Joshua. The difference between the leaders and their respective leadership styles, Joshua was the warrior, while Moses was the diplomat. When it came for the nation to leave Egypt, Moses was the leader. However, when the time came for Israel to enter the Promised Land, they had to fight to conquer the land. During that time, they needed a warrior and not a diplomat.

Today we live in an era where technology drives how many attend church, how they communicate, and how they interact with others. Are these particular pastors versed with the technological changes and knowledge that are available to the church in a manner that makes them relevant in today's society? Especially with how they have the potential to evangelize to millennials many of whom have the potential to lead the church. Sadly, many leaders are 'stuck in their ways' missing the opportunity to effectively minister to many within their communities. This does not mean they are deviating from the unadulterated Word of God, but they falter when having to use technology to be effective in their delivery.

This does not insinuate that older pastors are obsolete. Their wisdom and experiences are essential in assisting new potential leaders with the nuances of pastoral leadership. Their counsel should not be negated as they provide the wisdom that can only be obtained through their ups and downs of ministry. We as a society must glean from the instruction and experience, they provide. However, it is when leaders look to the future of their ministry that such wisdom, instruction, and experience can be shared and conveyed to the next generation. Our younger, inexperienced pastors need such counsel from our Apostolic Fathers to better serve their congregations and communities.

The outcome of this research project is to encourage pastors to broker the topic of succession planning and pastoral or leadership transition and open the lines of communications

with their leadership teams and board members to discuss further how they can ensure continuity in the running of their local assemblies. This is not only from the perspective of teaching and preaching but also in the administration of the church. In addition, this project will highlight the policies and practices of business, non-profit, and academia, documenting how organizations handled the topic of succession and how they prepared their respective organizations for a leadership change. The project will also highlight the successes and failures of organizations in leadership succession and transition endeavors.

The topic of pastoral succession and transition planning has been addressed from various perspectives. The topic of succession planning has been extensively researched and practiced in the business environment, so much so that church leaders who are serious about developing emerging leaders can only ignore it at their peril.¹ The concern is, with so much research available, why are there still church leaders who have not discussed the issue with their leadership and governance boards? Why have many churches not planned for the succession of leadership if those positions (for one reason or another) have been vacated? Research has shown that many churches that have not developed succession plans have not given thought to the topic or do not have a codified plan or strategy in place. Many interviewed leaders feel that the idea of succession is to document or name the successor in the church by-laws or constitutions. Unfortunately, no formal succession plan or strategy has been formulated.

According to one researcher, “eighty-four percent of churches lack a written emergency succession plan for the senior leader. As a result, many churches do not have a plan for the

¹ Ngomane, Richard M. and Elijah Mahlangu. 2014 Leadership Mentoring and Succession in the Charismatic Churches in Bushbuckridge. *HTS Theological Studies* 70(1).

inevitable moment when their current pastor leaves.”² Regarding those who have implemented a succession plan, what could they have done better to ensure a smoother transition? We are not speaking from the humanistic side (regarding the congregations’ emotions) but on how to better acclimate a new leader into the role of leading. There is no one specific strategy on how to handle succession planning. It can be a process that can evoke personal feelings from leaders who may feel they are being pushed from their pulpits. However, it is during the times of planning that the current pastor has the vision to look to the future of the church and the potential to reach other potential disciples of Christ.

The church must face a stark reality. The concept of pastoral succession and transition is inevitable.³ It is an issue that needs to be addressed sooner than later, which means it is important for pastors to have conversations with their leadership teams to ensure the success and continuity of the ministry or organization.

This chapter introduced the problem, the ministry context, background, theoretical framework, research questions, and purpose of this study. Definition of terms, assumptions, research limitations, and strengths are also addressed. Chapter 2 provided a literature review using a theoretical framework and methodological approach. The methodology of the data collection process and research design used in this study are described in Chapter 3. Chapter 4 presented the findings collected from the survey and analysis of data collected from respondents from the survey and subsequent interviews. Finally, Chapter 5 summarizes findings and recommendations related to the research questions presented.

² Vanderbloemen, William and Warren Bird, *NEXT: Pastoral Succession That Works*. (Grand Rapids: Baker Books, 2020), 30.

³ Ibid, 33.

Ministry Context

The Pentecostal Assemblies of the World (PAW) is described as a protestant denomination formally organized around 1916⁴. Its headquarters is currently located in Indianapolis, Indiana, and organizationally further broken down into Episcopal Districts or state councils. Currently, there are over sixty-five state councils globally. The locations for state councils include the continental United States, India, Africa, Venezuela, etc. Each state council has jurisdiction over churches in their specific areas of responsibility. Each District or council is headed by a Diocesan Bishop appointed by the organization's Board of Bishops. Each Bishop is allowed to be assisted by at least three assistants known as Suffragan Bishops. Suffragan Bishops typically have the authority over their specific region given to them by the Diocesan Bishop. District Elders fall under Suffragan Bishops, who oversee and assist elders (pastors and their respective churches) in their respective districts. In instances where the pastoral vacancy is vacant and there is no successor, the councils assist the church with obtaining a new pastor.

Zion Apostolic Christian Memorial Church is located in Petersburg, Virginia. It has a rich and robust history from its humble beginning in the early 1900s. Zion Apostolic was founded by Demos McLeod in the Petersburg area; however, due to an injury that led to the amputation of his leg, he relied on Linwood Christian, who was a deacon at the time to assist him. Since its inception, Zion has only had two pastors. Elder Linwood Christian, who had pastored since 1924, suddenly died on March 8, 1970. One of the elders, George Artis conducted services until a pastor was elected and installed. On August 3, 1971, Elder Samuel E. Wright, Sr., was

⁴ Britannica, T. Editors of Encyclopedia (1998, July 20). *Pentecostal Assemblies of the World, Inc.* *Encyclopedia Britannica*. <https://www.britannica.com/topic/Pentecostal-Assemblies-of-the-world-Inc>. Assessed February 22, 2022.

appointed Pastor. At the passing of Elder Christian, a succession plan was not in place, despite having elders and ministers in the congregation who had the potential to not only preach but to lead. While these leaders bore the responsibility to preach each Sunday after his death; Zion needed a pastor. At that time, the Virginia State Council (VSC) took the responsibility to assist the church in assigning its next leader.

Samuel E. Wright, Sr., was brought in to preach several services and voted on by the congregation to become the next Pastor. While there were many disagreements in the church business meeting, it was decided that Pastor Wright would be the next Pastor for Zion. A lack of a succession plan left the surviving church members and leaders grieving and floundering as to the church's direction. One could imagine the sense of disloyalty to having someone else lead the congregation at that time. Many members left the congregation, and there was a sense of loss among those left behind.

Bishop Wright pastored the church for over thirty-years until his health no longer allowed him to continue; his daughter, Pastor Suzie Wright, was appointed the Pastor. Again, there was no codified succession plan or strategy in place; however, the successor was named by Bishop Wright in the church by-laws and approved by the Board of Trustees. The announcement of the new leadership was made during a church business meeting.

Bishop Wright died in December 2019 after a prolonged illness, and in 2020 the church prepared to conduct the formal installation of Pastor Suzie Wright. Although the COVID-19 pandemic derailed the formal installation services, she was officially installed in March 2021. It is not sufficient to have a statement in the church by-laws that identifies one's successor but a definitive plan for the transition. Succession planning is a process, and there should be some type of document which details the strategy to be effective to ensure a smooth transition. This is

important not just to the pastoral staff but also to the congregants. Leadership teams and staff members who struggle and roam are more than likely to project the same mindset of uncertainty to church members. Members will stay with leaders who have a clear direction of where they are going. When that level of leadership breaks down, members tend to leave as stability is paramount to the ministry's success.

In each instance of leadership incapacitation or death for Zion, members of the congregation displayed fierce loyalty to the predecessor, which in some cases made the transition process cumbersome. As with many congregations, current members were resistant to new leadership. First, the new Pastor displayed his methods of advancing the church. In some instances, he relied on the current leadership team to assist with the transition, while in others, he did not; each had his way of doing things. Bishop Wright had his leadership styles, vision, goals, and objectives. Secondly, the members who had been with Elder Christian for quite some time were still grieving, and having someone else as a pastor was difficult since their loyalty was to their predecessor. The void left in the congregation due to Elder Christian's death caused resistance to Bishop Wright's new vision and leadership style. Third, other elders within the assembly may have been effective in assuming the role of Pastor who was not allowed to lead or who may have felt slighted at being passed over as Pastor. However, no succession plan identified who that should be. Consequently, some left the ministry to start their churches, taking with them some members of the congregation.

Problem Statement

Based on the researcher's experience, many pastors do not address succession planning and leadership transition. Instead, they feel their place is in the pulpit until 'God calls them home.' As a result, they leave their leadership teams and congregational members in shock as

they grapple with life without their leadership and guidance. As a result, the church is left to gather the emotional and administrative pieces, and many members expect that the church will continue with the mission as before. Nothing is further from the truth.

All churches eventually pass-through pastoral transitions. As difficult as such a transition is, practical principles can make the pain and complexities of these changes manageable. The task for church leaders today is to help the Pastor and congregation navigate the challenges that arise amid mitigating significant changes in leadership style, personality, and vision.⁵

A healthy pastoral transition enables a church to move forward into the next phase of its external and internal development with a new leader appropriate to their developmental tasks, and with a minimum of spiritual, programmatic, material, and people losses during the transition.⁶

In discussing succession planning, many pastoral leaders may have the mindset that it means they are leaving the pulpit at that time; however, this is not the case. The focal point of succession planning is the organization's future in that the Pastor, who is the visionary, identifies the next leader who will be responsible for leading the church into the desired vision and mission. It would be egotistic for leaders to believe they would be in their pulpit forever. In today's organizations, many visionary leaders are looking to the future to discover leaders whom they can collaborate with, and who can take up the mantle. This type of leader would have the fortitude and vision to develop a leadership program for the successor and all potential leaders who can work to benefit the organization. The organization will be in deep peril if it does not

⁵ Watkins, Ralph, *Leading Your African American Church Through Pastoral Transition*. (Valley Forge, Judson Press, 2010), 2.

⁶ Weese, Carolyn and J. Russell Crabtree. *The Elephant in the Boardroom: Speaking the Unspoken About Pastoral Transitions* (San Francisco: Jossey-Bass, 2004), 41.

focus on the future, as it would lead the ‘flock’ without a formidable shepherd to lead, protect it, and maintain the health and welfare of its members.

The following are scenarios that highlight the additional experience the researcher will draw upon and their impact on the transition to leadership teams and congregations. Each highlights the importance of having a conversation regarding succession planning in today’s ministries.

- The current Pastor received the assignment to transition to another position leaving his congregation in need of a senior pastor.
- The founder of the church passed the leadership baton to his son.
- The senior Pastor became ill and tried to continue pastoring while in declining health.
- The Pastor is contemplating retiring.

Although this research focuses on the African American community, the idea of succession or lack should be of interest to all churches regardless of ethnicity and denomination. Many churches will find themselves in one of these scenarios. They have in common the necessity of having a succession plan that will identify who will lead the congregation if the senior Pastor becomes incapacitated. There is a need for the Pastor to determine who will lead the congregation in each case. Each Pastor is responsible for the organization's success and should discuss this with his leaders in attendance to determine who is best qualified to lead the ministry into its next phase.

The topic of succession planning, and leadership transition is important to the researcher because the church needs a strategic plan that addresses its future. Such planning will allow the Pastor and the leadership team to consider the future of the ministry in terms of health and spiritual growth. The topic of succession is biblical from numerous perspectives, namely Moses and Joshua, Elijah and Elisha, Paul and Timothy, Jesus, and the disciples. The Great

Commission instructs the church to be proactive in developing leaders, as noted in Matthew 28:18-20. In following Jesus' leadership style, He was intentional about preparing the disciples on numerous occasions for the time He would not be with them. On several occasions, Jesus reminded the disciples that He would not be with them always. Pastoral leaders are encouraged to take an active role in the succession and transition of leaders under their purview so that the mission of their local assembly can be recognized, which will positively impact their community and the world.

It is important to note that first and foremost, God plays (or should play) a pivotal part in determining who will succeed the Pastor. Secondly, the leadership team must address the role of the church governing board or trustee board members in the final decision (if applicable).

Thirdly, depending on the church's government structure, the appropriate decision-making board should be aware of the succession decision by approval or some sort of buy-in. Finally, having a succession plan will ensure that the church experiences a smooth transition in the next phase of its growth and development. The lack of a succession plan or strategy could ultimately send the ministry spiraling out of control as members and leaders are left to figure out what to do next.

Based on the extensive studies on succession planning and pastoral transition, one critical question would be whether pastors have considered the perspective of transitioning leadership and a succession plan that has been agreed upon by the existing governance board. The problem is that though much research exists on succession within the business, non-profit, governmental, and ministerial environments, many churches do not have a formal succession and transition planning strategy in place. This is detrimental to churches' vision, mission, and overall spiritual health of church members and the communities they serve.

While researching for this project, the researcher has concluded that many pastors especially in the African American churches do not properly address pastoral succession, if at all. Many are not taught to consider the future when their time of leadership has passed. Their paradigm is “the Lord will provide.” The researcher believes that although the Lord does provide, He expects us to be good stewards of what He placed under our purview. Pastoral leadership is the area where God charges His shepherds to tend to His sheep effectively, take care of their needs, and see to their future; this is where leadership succession comes into play.

Purpose Statement

The purpose of this study was to survey pastors and ministry leaders to ascertain their thoughts and experiences regarding the preparation of succession planning within their respective congregations. The researcher illustrated those instances where a succession plan or strategy was set up whereby the church recognized a smooth transition and illustrated instances where a succession plan was not in place and the negative impact of such actions on the congregation and the church. It identified those lessons learned on how leadership transitions could have been more effective. It also highlights approaches from the public sector that could benefit the development of succession planning practices and processes to assist others in their planning endeavors.

This project addressed the problem that many churches fail to have a succession plan in place that will outline who will lead the church if the leadership position is vacated.

Basic Assumption

To be effective in leadership, each leader must be receptive to positive and negative criticism. As pastors are ultimately responsible for the health and welfare of their local assemblies, it is assumed that they follow the Holy Spirit's leadership in their leadership roles. It

is assumed that each leader seeks to empower potential leaders not only for ministry in their local assembly but to branch out in the furtherance of the Gospel. Finally, it is assumed that each Pastor has reached maturation in their spiritual walk with God, who has the final say in their leadership decisions and is teachable to lead the flock they oversee effectively.

Definitions

The researcher will use the following terms throughout the project with their definitions.

Succession is defined as “the intentional transfer of leadership, power, and authority from one primary leader to another.”⁷

Succession Planning is defined as “a systematic, long-term process of determining goals, needs, and roles within an organization and preparing individuals or employee groups for responsibilities relative to work needed within an organization.”⁸ Succession planning is a proactive approach⁹ because the predecessor intentionally chooses their successor.

Leadership is defined as “a process where an individual influences a group of individuals to achieve a common goal.”¹⁰

Pastoral transition is the process whereby the current Pastor (predecessor) leaves the role as Pastor, and the new Pastor (successor) assumes that role and responsibilities.

A successor is defined as one who follows another in an office or position.

A predecessor is defined as one who previously occupies an office or position.

⁷Vanderbloemen, William and Warren Bird, *NEXT: Pastoral Succession That Works*, (Grand Rapids: Baker Books 2020) 10.

⁸ Luna, Gaye Winter, 2012, Planning for an American Higher Education Leadership Crisis: The Succession Issue for Administrators, *International Leadership Journal*, Vol. 4, No. 1, 56.

⁹ Zulqurnain, Ali and Aqsa, Mehreen. 2019, Understanding Succession Planning as a Combating Strategy for Turnover Intentions. *Journal of Advances in Management Research*, Vol. 16, No. 2, 216.

¹⁰ Peter G. Northouse, *Leadership*, (Thousand Oaks: Sage Publications: 2001), 3.

Nepotism is defined as favoritism as shown by one in authority to family members.

A *Succession Plan* is defined as a detailed written plan ratified by the highest leadership of the local church and implemented to accomplish a smooth transition from one Pastor to another.¹¹

Statement of Limitations

The focus of this research was to survey pastors from various churches within the Maryland, Virginia, and Washington, DC areas and across differing denominations. Although the title suggests that it is centered in African American churches, it is important to note that this theory and the importance of succession spans across racial divides and denominations. The goal of the project is to assist church leadership in developing a succession plan and dispel the mysteries behind its concept. Pastors have many underlying issues when addressing pastoral transition and succession. Many churches do not have formal succession practices and processes.

Though this research is centric on the ministry of churches within the Pentecostal Assemblies of the World (PAW), this project can serve as a model for other churches. It will highlight strategies and contributions from the business sector which provides valuable information to assist in developing processes the church can glean from. In addition, the project aims to identify strategies and approaches to succession planning, resulting in developing a succession plan document.

As stewards of the church, the Pastor is ultimately responsible for ensuring its success after they have gone. Each bears the responsibility of looking towards the future in evaluating who is best qualified to take the reins of leadership and mentor that person with the knowledge

¹¹ Planning and Implementation Successful Pastoral Succession. Training Leaders for Healthy Churches. Downloaded from www.lovelaceleadership.org

and skills they not only possess but to acclimate them to the nuances of church ministry based on the vision that God has designed for the local assembly. There is a paradigm that must be dispelled. Many pastors lacked a leadership mentor, leading to transition and succession. As a result, they pass this mindset on to the next generation. Many experiences are not discussed so future generations can learn from the past.

Additional pastors were contacted based on their relationship and suggestions from others within current organizations. Again, the researcher encountered those who were unwilling to answer the survey. Another limitation of those who responded to the survey was pastors' unwillingness to share their transition documentation or lack of such documents. It was not the intention of the researcher to scrutinize such documents but to use them as a focal point to develop a succession plan for those organizations that may not formally have such a plan in place.

Delimitations

The primary respondents were pastoral leaders who are part of the PAW with churches located in the District of Columbia, Maryland, and Virginia areas. The research consisted of online surveys, interviews, and other documents. In addition, the research concentrated on additional studies, lessons learned, and literature related to leadership succession and transition.

The researcher believed that gleaning experiences from seasoned leaders regarding their pastoral experiences in succession and leadership training was beneficial to this research and developing documents or templates. In addition, sharing such experiences would help others foresee where they were in the succession planning stages and ensure positive results.

Thesis Statement

The topic of succession planning is important to the continuity of our local assemblies. Each Pastor bears the responsibility to ensure they have a hand in selecting their successor to complete the mandate to disciple others as given by Jesus Christ.

Chapter 2

Conceptual Framework

There has been considerable research regarding leadership, succession planning, and transition from the perspectives of business organizations, non-profit organizations, and ministries. Numerous literary works have addressed the importance of succession planning, many providing strategies for its successful implementation and identifying obstacles to implementation within many organizations. Many articles and research highlight the lessons learned from organizations that had been negatively impacted because they failed to have a codified succession plan documented. This chapter will review literary works that address the positive impact of succession planning. The researcher reviewed literature relevant to this study on leadership succession planning that addressed theological foundations of leadership, pastoral transition, and succession planning. This chapter discussed the relevance of succession planning to the church environment. It dissected the theology of pastoral leadership as a basic foundation with the theology of succession planning and implementation building upon it.

The section on succession planning discussed its importance, its advantages, and disadvantages, and outlined reasons why many leaders may not discuss the topic. As leaders, discussing succession planning is essential for the organization's future. However, many leaders tend to shy away from the topic because it means they have to face the reality that there will come a time when they are no longer at the helm of the organization. The next section will discuss how succession planning has been conducted within various sectors such as the private sector, the public sector (such as the government), and the non-profit sector. It will also highlight the lessons learned when planning was not brokered.

As succession planning has been discussed within various sectors centric on leadership, whether in the for-profit sector, the non-profit sector, or the governmental sector, studies have also been conducted by surveying leaders to ascertain their succession planning readiness within their respective organizations. Studies have shown that although this process is critical to the organization's future, leaders do not teach their successors to pass on the leadership baton until it is too late. Many leaders confess they have not done a good job in those organizations where succession planning has been initiated. Succession planning should be a priority in every environment, and each leader needs to think outside of the box when discussing this topic.

When discussing succession planning, leaders may believe that it means they are preparing to leave the pulpit immediately. On the contrary, the focal point of succession planning looks to the organization's future. Succession planning forces the leadership team led by the Pastor to identify who the next leader will be in moving the church into the vision and mission that has been established. Good leadership benefits the leader and the staff or leadership team. Both parties must be active in the leadership process.¹²

Weese and Crabtree authors of *The Elephant in the Boardroom* remind pastoral leaders that “every Pastor is a departing pastor and the day to begin thinking about transition is the day the [new] Pastor arrives. This forces the Pastor to think strategically, to reflect on what they want to accomplish in their ministry, and what they want to offer as a base for potential successors to build on.”¹³

¹² Malone, Rayford E, *The Joshua Dilemma: Mentoring Servant Leaders to Transition Through Ministry Succession*, (Dallas: Saint Paul Press, 2017), 13.

¹³ Weese, Carolyn and J. Russell Crabtree. *The Elephant in the Boardroom: Speaking the Unspoken About Pastoral Transitions*, (San Francisco: Jossey-Bass, 2004) 48.

Theology of Leadership

The approach a leader handles succession says a lot about their leadership abilities. Leaders are called to serve others besides themselves. It has been argued that leaders must be servants first. The tests for leaders to ask if those they are serving are maturing as people; are they becoming spiritually healthier, wiser, and more likely to become servants themselves? Church leaders are called not to serve their own needs but the needs of others. For leaders to fulfill their moral obligation to lead by serving, they must prepare for the day when someone else will lead in their place. Few leaders take the time to prepare for the ministries' continuation without them. The primary obligation and responsibility of a leader are to see the organization's mission continues. It is an important way for the leader to serve the ministry they are called or assigned to and their members and communities. Leaders need to make choices that ensure the success and future of the churches they serve.

Various authors have specific definitions of what defines a leader in our society. These definitions vary based on their research and experiences. There are also differing opinions on whether leaders are formed or made based on life experiences. The researcher believed that leaders are instrumental in guiding others to their purposes. They have the credibility and confidence of their followers, which will cause them to follow their directions. Although many persons are in a managerial role, they are not necessarily leaders; they are filling a void to manage resources. Therefore, there is a difference between leadership and management.

Peter Northouse defined leadership as “a process where an individual influences a group of individuals to achieve a common goal.”¹⁴ The process implied that leaders affect and are affected by those who follow them. Leadership involves influence, occurs in groups, and pays

¹⁴Peter G. Northouse, *Leadership* (Thousand Oaks: Sage Publications: 2001), 3.

attention to organizational goals. Leaders direct their energies on working with others to achieve these goals.

Malphurs and Penfold in *Re: Vision* stated that “there is a lack of strong visionary leadership in today’s churches.¹⁵ They also observed that churches are not readily developing visionary leaders.¹⁶ This negatively impacts the direction of many churches. Vision comes from God. God communicates the vision to man (i.e. leaders) responsible for ensuring its fruition. Leaders, in turn, bear the responsibility to develop their skills and intellect to proceed in the direction God would have the organization go. Whether taking additional seminary courses or attending leadership conferences and training, leaders are encouraged to take the necessary steps to prepare themselves for the roles and responsibilities of leadership.

Although there is a slight difference in the definition of spiritual leadership, there are different characteristics one would possess. Blackaby and Blackaby outlined the distinctions between leadership and spiritual leadership as the following: (1) the spiritual leader’s task is to move people from where they are to where God wants them to be; (2) spiritual leaders depend on the Holy Spirit in the accomplishment of their God-ordained tasks; (3) spiritual leaders are ultimately accountable to God; (4) spiritual leaders influence all people, not just God’s people; (5) spiritual leaders work from God’s agenda and not their own.¹⁷ According to *Spiritual Leadership* by Sanders, many are looking for authoritative, spiritual, and sacrificial leaders.¹⁸

¹⁵Malphurs, Aubrey and Gordon Penfold. *Re: Vision: The Key to Transforming Your Church* (Grand Rapids: Baker Books), 29.

¹⁶Ibid.

¹⁷Blackaby, Henry and Richard Blackaby, *Spiritual Leadership*, (Nashville: Broadman & Holman Publishers, 2001), 20-23.

¹⁸ Sanders, J. Oswald, *Spiritual Leadership* (Chicago: Moody Press, 1994), 10.

Authoritative, because people desire leaders who know where they are going and are confident about getting there. Spiritual, because without a strong relationship with God, even the most attractive and competent person cannot lead people to God. Sacrificial, because this follows the model of Jesus, who gave himself for the world and who calls us to follow in His steps.¹⁹

Spiritual leadership is infused with the prompting and guidance of the Holy Spirit. Oswald Sanders noted that “without a touch of the supernatural (the anointing), qualities such as dependence, approval, modesty, empathy, or optimism are as dust.”²⁰ Sanders also noted that to be effective as a spiritual leader, one must take the stance of a ‘servant’ as noted in Mark 10:42-43: Jesus called them together and said, “You know that those who are regarded as rulers of the Gentiles lord it over them, and their high officials exercise authority over them. Not so with you. Instead, whoever wants to become great among you must be your servant.”²¹

Such leadership characteristics distinguish leaders of the secular or business world from those within the body of Christ. As a spiritual leader, one is concerned for the spiritual well-being of the congregation and the community in which they serve. A servant leader possesses a servant’s heart, not to boast of themselves or their agenda, but of God’s. Servant leaders spend time in the presence of God to gain clarity and receive instruction, and empowerment so that they can complete the assignment God has given them. In *Lead Like Jesus*, the authors observed that “leading like Jesus implies infusing harmony in one’s influence on the people with God’s plan for their lives and ministries.”²² Leaders need to assist congregants in realizing God’s plan

¹⁹Ibid.

²⁰Sanders, 25.

²¹Unless otherwise noted, all biblical passages referenced are in the New King James Version ((Nashville, Thomas Nelson Publishing, 1997).

²² Blanchard, Ken and Phil Hodges, *Lead Like Jesus*, (Nashville: Thomas Nelson Publishing, 2005), 193.

for their lives and empowering them to move in that direction by providing them opportunities to grow and mature so they can be effective and successful in their callings. Pastors could identify potential successors during times of empowerment, training, and working alongside leaders.

Today's pastors may think of leadership in terms of preaching, teaching, and pastoral care. However, in terms of leadership within the context of our modern-day churches, more is required and essential to the viability of the church in our communities. The leader:

- must identify the contemporary critical issues of leadership facing our churches today.
- seeks to integrate those issues into an established framework of biblical perspective that is informed by general leadership theory.
- should seek to understand how the current issues fit within the larger tapestry of the church's history and how past leaders have dealt with similar issues.
- ought to understand the impact of leadership development on the local, individual church and its parishioners and its impact on the universal church and the unbelieving world.²³

One may wonder about the relationship between this and succession planning. It affects the church and its congregations, leaders, and the communities in which they, the church, are located and serve. Becoming a pastor is more of a calling than it is a job. Pastors are called by God and bear the responsibility of feeding the flock, protecting them, and attending to their spiritual needs. Everyone in leadership is not called to be a pastor. In leadership succession, it is vitally important that the one who succeeds the Pastor also possesses a "Pastor's" heart for people. Pastoral transition is undeniably inevitable. However, without the proper planning and forethought of who will take the helm, all will suffer in one form or another. As leaders devote time to focus on the future mission, vision, and goals of the church, the guesswork of

²³ Huizing, Russell L. Fall 2011 Bring Christ to the Table of Leadership: Moving Towards a Theology of Leadership. *The Journal of Applied Christian Leadership* Vol 5, No 2, 64.

determining who is capable of taking the organization into the future is eased, thereby building up the church in terms of maturity and purpose of its members.

Many businesses and public and private organizations envision the future to secure their legacies in their specific environment. To ensure the viability of his organization (to make money), the businessman constantly seeks someone who can effectively replace him at the leadership helm. Although he would prefer someone within, the ultimate goal is to ensure the business maintains its financial standing or thrives in times of transition. Church leadership should not be different. The difference in paradigms is that the church's mission is to make disciples. Therefore, pastoral leaders should always search for a leader who can lead the church's different facets to introduce others to Jesus Christ, causing them to be His disciples.

Nepotism

The researcher feels it will be remiss to complete this research without addressing *nepotism*. Although nepotism is not the focal point of this project, it is important to explain why many pastors delve into this behavior. Nepotism is defined as a practice in which persons in leadership roles or influence favor relatives or friends, particularly by giving them roles or responsibilities.

In the United States, pastoral succession within families is a common practice --- and often a successful one. For example, America's largest church, Lakewood Church is led by Joel Osteen, the son of founder John Osteen.²⁴

²⁴ Lee, J. Y. 2020, Korean Megachurches Debate If Pastors' Kids Can Inherit Pulpits. *Christianity Today* Accessed from <https://christianitytoday.com/news/2019/july/myungsung-presbyterian-church-korea-pck-pastoral-succession.html> January 2022.

Warren Bird makes the following explanation regarding nepotism. He explains, “nepotism, originally “nephew-ism,” came from a church context. It was where certain priests had certain nephews that they wanted to position well in the responsibilities and hierarchy of the church. That’s where “nepotism” as a pejorative, critical term comes from.”²⁵

Being a pastor can be a grueling ministry with many unrealistic expectations from the congregation members, the community, and other church leaders. Many congregants unrealistically place their leaders at such high standards that it almost seems impossible to live up to them. As a result, pastors may feel comfortable leading when surrounded by those they have a good . Secondly, since many pastors serve the ministry on a full-time basis, the income or stipend received from the church may need to be supplemented by another income. Therefore, it is economically prudent for some pastors to employ family members to have the necessary income to sustain themselves and their families. The researcher believes that not all nepotism is bad.

First and foremost, nepotism can be good for ministry, or it could be bad for ministry. This researcher speaks from the perspective that if the previous leader left their ministry in the hands of their son or daughter whose vision would increase the spiritual growth of the congregation, continue to evangelize the community develop disciples, and move in the lines of the church’s vision, then nepotism could prove to have a positive impact on the church. It would be counterproductive for any leader to assume their children would be better for the church at large. That is not to say that as parents we may want our son or daughter to follow in our footsteps. It is important to note that if that person does not express a genuine interest or more

²⁵ Lee, Morgan, 2019, Should You Pass Your Church to Your Son (or Daughter)? *Christianity Today*, Accessed January, 2022 from <https://christianitytoday.com/ct/2019/july-web-only/pastoral-succession-family-son-daughter-nepotism.html>

importantly has not been identified by God as the next leader of the organization whether it's a ministry or nonprofit or for-profit organization it will be dangerous and unfair to push that person into the position of leadership. Many church memberships have dwindled because the wrong person was at the helm whether they were a son or daughter or just a wrong leader.

Many find that nepotism is rampant in the African American church unfortunately to the demise of the congregation. For example, many pastors may feel their wife is better equipped to run the church in the event the pastoral position is vacant. However, without the proper training and experience that would not be the wise choice for the body. This does not alleviate that there may be others within the body who currently serves on the leadership team who are better equipped to be the pastor as well. As a result, many members may feel slighted when overlooked because they are not a part of the first family.

It is prudent for leaders to ensure that they would hire this person whether they were a family member or not. For example, if the church or ministry requires an administrative assistant; it would be prudent to hire someone with the skills set consistent with the position and not because they are part of the pastor's family. Nepotism is good in this researcher's opinion when it is for the betterment of the organization; when that leader's children possess the necessary capabilities and have been trained to be better leaders so that the church is left incapable or of better hands than the predecessor. It is negative when it is the opposite; (i.e., the one in charge does not possess a pastor's heart, a heart for the ministry, and more importantly the heart of God). "Succession works well for a family member who grows up in a church, embraces its vision, possesses the gifts, receives mentoring, and creates an environment where non-family members can thrive."²⁶

²⁶ Lee.

Theology of Succession

It is important to develop a biblical foundation for this principle in addressing succession within the church. William Vanderbloemen and William Bird make the following observation, “throughout the Bible, the message about succession is consistent: effective leaders plan for the time when they can no longer lead, and they prayerfully prepare for that day.”²⁷ Succession planning in leadership is biblical, as noted with Moses and Joshua, Elijah and Elisha, and Jesus and the disciples. The Bible reveals God’s pattern of working through successive generations. God gave his people specific instructions concerning how they were to train and prepare the emerging generations of leaders (Deuteronomy 6:6-9; 20-25).²⁸ There are many leaders today who give little or no “thought to the conclusion of their leadership and so they do little to prepare for it. However, then suddenly faced with leaving their office, they realize that much of their work will have been in vain unless there is a capable successor.”²⁹

Kyle Robinson, in his dissertation entitled *Distributed Succession: Managing the Transition of Multi-Site Campus*, made the following observation in addressing the theology of leadership succession:

When it comes to the church, this focus on leadership succession started with the founder of the church, Jesus Christ. Jesus spent much of His time during His earthy ministry distributing His leadership through His Apostles, and when He was gone, the mission of Jesus lived on through those He developed. Over 2,000 years later, local church leaders have the same obligation to invest deeply into the lives of others and ensure that Jesus’ mission is continuing to live on, beyond anyone pastor or leader, but extending from generation to generation.³⁰

²⁷William Vanderbloemen and William Bird. Next: *Pastoral Succession That Works*.

²⁸ Henderson, Jim. The Value of Succession Planning. *Leadership Advance Online*. Issue: 7, Accessed from Regent University (ATLA Database) January 2, 2021, https://www.regent.edu/acad/global/publications/lao/issue_7/henderson.html

²⁹ Ibid.

³⁰ Robinson, Kyle, *Distributed Succession: Managing the Transition of Multi-site Campus Pastors* Accessed

As we use Jesus' leadership style as an example, we understand that He spent His time preparing the disciples to pick up the leadership mantle in fulfilling the Great Commission. Leadership mentoring and succession programs are critical in developing and preparing emerging leaders for leadership transitions.³¹ A healthy pastoral transition enables a church to move forward into the next phase of its external and internal development with a new leader with minimal spiritual, programmatic, and people losses during the time of transition.³²

It is vitally important for leaders along with their respective boards to realize that no one is indispensable. There will be leadership changes within our churches as well as organizations. Sometimes it is God's doing as He leads pastors to other ministries. Other times it is man's doing as he disqualifies himself for pastoral leadership.³³ Once the church leadership recognizes that pastor leadership changes will occur, it can make the necessary plans to proactively take steps to ensure a smooth transition when it does happen.

A study of leadership emergence patterns in the Bible reveals that many leaders, whether by coincidence or design, had understudies to whom they handed over the "baton" at the end of their ministries.³⁴ Such relationships include Moses and Joshua, Elijah and Elisha, Paul and Timothy, and Jesus and the twelve disciples. The succession process between Moses and Joshua will be examined in this research.

March 16, 2020, from https://dspace2.creighton.edu/xmlui/bitstream/handle/10504/114524/KyleRobinson_FinalDIP_Approved.pdf 95.

³¹ Ngomane, and Mahlangu. 1.

³² Weese, and Crabtree. 41.

³³ Beery, Kevin. January 2011, *The Value of Succession Planning in the Church*. Accessed April 2020 <https://enrichmentjournal.ag.org/Issues/2011/Winter-2011/The-Value-of-Succession-Planning-in-the-Church>

³⁴ Ngomane and Mahlangu, 1.

Definition of Succession Planning

Depending on whom one asks, there are various definitions or interpretations of succession planning. The definitions of succession planning across multiple disciplines vary:

- Succession Planning is defined as a process for the long-term viability of an organization.³⁵ For the process to effectively work, replacement, continuity, and leadership development are essential to the organization's longevity.
- Succession planning in the public sector is defined as a proactive process that begins developing successors years before they will be needed. It accounts for the fact that eventually, there will be changes in leadership in an organization. It is inevitable, and planning for such change, equips the organization to continue its objectives and performance.³⁶
- Succession planning can be defined as a “systemic, long-term process of determining goals, needs, and roles within an organization and preparing individuals or employee groups for responsibilities relative to work needed within an organization.”³⁷
- Succession planning is the process of identifying and developing potential future leaders or senior managers and individuals to fill other business-critical positions, either in the short- or long term. In addition to training and development activities, succession planning programs typically include the provision of practical, tailored work experience relevant for future senior or key roles”³⁸
- Succession planning is an intentional effort designed to ensure leadership continuity and continued performance for an organization by planning for the development, positioning, and replacement of leaders over time.³⁹

³⁵ Hollinger, Thomas D. 2013, Leadership Development and Succession Planning: A Biblical Perspective For An Ethical Response, *Journal of Biblical Perspectives in Leadership*, Issue 5, No. 1, 157.

³⁶ Hove, Jeff. *Why Are We Still Talking About Succession Planning in 2019?* January 31, 2019.

³⁷ Luna, 57.

³⁸ Weeks, Ally. (2020) Succession Planning. Chartered Institute Personnel and Development. Accessed from <https://www.cipd.co.uk/knowledge/strategy/resourcing/succession-planning-factsheet>, London, England. February 10, 2021.

³⁹ Rothwell, W. J. (2005). *Effective Succession Planning: Ensuring Leadership Continuity and Building Talent from Within* (3rd ed.). New York, NY: American Management Association.

Each definition agrees that succession planning is a lengthy process that takes time to be codified. Despite the various industries, the theory of succession planning should be paramount for many leaders. Succession planning is an ongoing dynamic process that assists a business or organization align its goals and human capital needs. In assessing leadership needs, organizations must be careful to analyze the present and anticipated future needs of the organization.⁴⁰

Orellano and Miller stated that the three basic goals of succession planning should include: “identification of critical management positions within the organization, identification of future vacancies in those positions, and identification of managers who would potentially fit into these vacancies.”⁴¹ Past studies of succession management demonstrate that succession planning in its advanced stage requires additional study to identify the potential of succession planning in creating future leadership by establishing the relationship between succession planning and worker turnover intentions.⁴²

Advantages of Succession Planning

Effective succession planning reinforced ideals that organizational senior leaders are personally concerned with the success of junior leaders and to be sustainable under duress. To perform well. To perform well and to be sustainable under duress, organizations must have leaders prepared to fill voids when necessary.⁴³ The process of succession planning places the church in a better position to handle leadership changes before their occurrence. As churches

⁴⁰ Butler, K. & Roche-Terry D. (2002) Succession Planning: Putting an Organization’s Knowledge to Work. *Nature Biotechnology*, 20(2), 201.

⁴¹ Orellano Tim. and Miler, Janice, April 1977. Succession Planning: Lessons from Kermit the Frog. *SHRM HR Resource Information Center*.

⁴² Zulqurnain, and Meheen, 57.

⁴³ VanVactor., Jerry. The Challenge of Success: Allowing Leaders to Lead. *The International Journal of Leadership in Public Services*. Emerald Group Publishing Limited. Vol 7, No 3. 200.

should actively evaluate their mission and strategy yearly that would be an opportunity to broker the concept of succession. The leadership team can take time to determine specific qualities and skills beneficial in effectively leading. As pastors discover there are qualities and skills, they may not possess which will be beneficial to the church administration they will use such time to obtain them. As a result, when identifying a successor, those same qualities and skills will be required. The benefits and advantages of such planning are also beneficial to the leadership in identifying those gaps in their knowledge and experience to better meet the ongoing church needs. As a result, the opportunity to train existing leaders is presented. Succession planning encourages internal employees toward strategic organizational change for future key positions compared to external hiring.⁴⁴

A major advantage of succession planning is that leadership is aware and has approved of who will succeed if something happens to the current Pastor. The planning process, when implemented, effectively allows the previous leadership to identify their successor. This is good because the Pastor has a hand in setting the church up for a healthy transition, potentially placing it in a better position to handle the transition and move on. Effective succession planning assists in minimizing the hiring costs of external personnel. It motivates internal employees to secure a leadership position in the future. Succession planning holds talented and skilled employees who empower the firms to appoint them in sudden vacant positions for the smooth functioning of retail banking operations.

Disadvantages of Succession Planning

With the vast information and research on succession planning, many pastors fail to plan for their respective ministries. A succession planning discussion can be very personal and

⁴⁴ Zulqurnain and Aqsa, 57.

intimidating for the leader. Many leaders tend to shy away from the subject because they feel their leadership position is threatened and are losing control of the organization. Many are not in the space where they are willing to receive what they may view as criticism of their leadership skills and abilities. As stated earlier, many members place high unrealistic expectations on their pastors. The same can be said for our leadership teams as well (or the pastor). That is a recipe for disappointment and heartbreak. Such an exercise should be viewed as an opportunity to point out areas where growth is desirable. It is an exercise for the entire church leadership as we all possess areas where growth is necessary to be effective in ministry. While brokering the conversation of succession planning and transition, leaders tend to feel that their time at the leadership helm is coming to an end. Many are not prepared for this.

As leaders, we are responsible for looking into the future of the organization and ministry. Conversations regarding potential successors place the organization in the position to experience a smooth transition versus one filled with uncertainty. As stewards, we ensure that the organization's mission is carried on after we are gone. It is important to create an atmosphere with the leader that such feelings are addressed in consideration to doing what is best for the ministry; ignoring these places jeopardizes the future.

Succession Plan Document

The result of succession planning is a refined succession plan. Such a plan can be a 'living document' as it should be reviewed periodically to ensure the information contained is current, valid, and consistent with the organization's goal. Such a plan is defined as a document that usually describes what must be done and why⁴⁵ if there are changes in the organizational

⁴⁵ Hove, Jeff. *Why Are We Still Talking About Succession Planning in 2019?* January 31, 2019.

structure. A succession plan will focus on aspects of existing processes such as performance and leadership gaps that will be resultant of past transitions.

An effective succession plan is described as:

- One of the most useful tools to prevent interrupted operations when a key role in the organization becomes vacant
- One that identifies and develops future leaders consistent with the mission and strategic goals
- Helps ensure the pool of future leaders feel value and are more willing to stay within the current organizations rather than move to another agency or organization to further develop their careers⁴⁶

An effective plan requires the development of future leaders and nurturing leadership functions.⁴⁷ Effective succession management begins with leaders developing other leaders at multiple levels of management. Effectively managing succession stands much to gain a thorough and clear understanding of how leadership development and planning are integrated into any organizational practices and procedures during the transition.

Importance of Succession Planning

Regarding succession planning, Mullins makes the following observation regarding corporate leaders and church leaders: “The best corporations have succession plans in place, and their leaders spend a great deal of time grooming successors and planning the handoff. Fewer church leaders seem unwilling to tackle succession planning. Some are afraid to tackle the difficult subject. Others seem to think it is not spiritual to plan.”⁴⁸ Some organizations have never had to think about the transition at the top leadership level because they are currently being

⁴⁶ Hoye, Ibid.

⁴⁷ VanVactor, 195.

⁴⁸ Mullins, Tom *Passing the Leadership Baton* (Thomas Nelson Nashville 2015), xiii.

led by the ministry founder. Others do not have a strong enough board to take the lead when the chief executive should move on or not want to let go, or when the staff does not want to let go of their director. Others have a strong-willed or shortsighted director who makes the issue of transition difficult to discuss.

The topic of pastoral succession is often emotionally loaded because it touches on issues that are not easy to discuss openly. The topic of preparing for leadership transition and succession is godly wisdom being exhibited and a Biblical pattern laid out by Old and New Testament leaders. Moses (Numbers 27); Elijah (2 Kings 2); Paul (2 Timothy 1); and Jesus Christ (John 17:18; Matthew 28:18-20; Acts 1:8) are examples of the numerous times church leadership executed succession planning and transition.

The objective of succession planning is to ensure the availability of appropriate human resources to fill vacant positions created by retirement, promotion, or the resignation of employees.⁴⁹ According to a survey co-sponsored by Leadership Network, forty-four percent of respondents rate their succession preparation as either poor or fair when asked, “How would you rate efforts at planning for the senior pastor’s eventual succession from this church relative to where you feel that planning should be?” Only eight percent picked the top choice of ‘outstanding’⁵⁰ Surveys such as these show the disparity of leaderships’ inability to effectively plan for the future of the organization's leadership by ensuring that the right person is in place.

⁴⁹ Armstrong, M (2003) *A Handbook of Human Resource Management Practice* 9th edition Cambrian Printers, London.

⁵⁰ Bird, Warren. *Succession Readiness: Surveying the Landscape of Large Church Pastors*.

Why Pastors May Not Discuss Succession Planning

Succession or leadership transition is a timid topic for many pastors mainly because they may feel uncomfortable brokering the topic. Several reasons can make it difficult for pastors to step down or retire as they grow near retirement age. These can range from a deep attachment to the church and a reluctance to relinquish their leadership of it, to fear of change and resistance to enter into a season of retirement, to the need for financial security.⁵¹ Many have been pastoring for quite some time, and the thought of leaving a position or role they have become comfortable with or have not prepared for are viable reasons. Many pastors have not considered leaving their pastoral position based mainly on finances. Full-time pastors rely on their salary from the church to care for their families. Many do not have other streams of income to rely on. Therefore, leaving their current position eliminates that source of income, and many lack the resources to sustain themselves and their families. Financial management planning or retirement planning is often lacking in the community. It is vitally important for this paradigm to shift.

The research behind *Next: Pastoral Succession that Works* found that it is a combination of lack of financial preparation, lack of comfort in letting go of the church, and lack of a dream and calling for what is next,⁵² which prevents many pastors from identifying their successor. Or it may be the reason that many pastors pass the leadership mantle to one of their children or spouses. Another reason may be centric on the current Pastor being afraid of giving up their control of the church itself. This is mainly when the Pastor is the founder of the church or is from a line of family pastors whereby the mantle has been passed down.

⁵¹ Stetzer, Edward, 2018, Church Succession: How to Lead Our Churches Into a Healthy Future, *Christianity Today*, Accessed from <https://www.christianitytoday.com/edstetzer/2018/may/church-succession-how-to-lead-our-churches-into-healthy-future.html>. January, 2022.

⁵² Ibid 3.

This researcher felt that it is important to highlight organizations that did not have a plan of transition in place and the impact that decision had on the church. We have already addressed the importance of ensuring that God is in the planning process of identifying and choosing one's successor.

Jericho City of Praise

Jericho City of Praise is located in Prince George, Maryland. Its pastor Betty Peebles passed in 2010 with the presumption that her son, Joel Peebles, would take up the mantle of leadership. Pastor Peebles, in turn, had taken over the ministry when her husband Bishop Peebles passed away prior. Due to a lack of a succession plan, codified and approved by the board of directors, the leader was decided by the Maryland Court system. After a time of bitter dissension, the church split, and the church's locks were changed to prevent the late Pastor's son from gaining entrance; the church suffered a loss.

Such loss was felt by the congregation members, financial, and those involved. Such steps ultimately placed the church in a poor light as there was much confusion, and harsh feelings, and ultimately, its relationship spiritual light in the community diminished. God does all things decently and in order. Having a plan of succession documented and vetted by the board would have eliminated many of the issues and bad publicity the church and its members suffered.

Importance of Succession Planning

Leaders need to focus on the ramifications of having proper plans in place to assist the church as a whole to recover in the event they vacate the pulpit. It is inevitable for change to happen in the community. The importance of succession planning allows for all administrative staff (i.e. pastoral team, Board of Trustees, and elders) to intentionally plan for how the ministry will react in the best interest of the church. Addressing the issue of succession planning will

force each to decide how to best transition leaders in a manner that will minimize disruption to the ministry. While considering the importance of succession planning, the following were noted regarding the lack of planning:

Pastor of Jericho, located in Landover, Maryland, dies, and her only surviving son is left in charge. According to him, his mother left him in charge, naming him to the church's governing board. There was no plan in place to corroborate his story, and the board produced conflicting documents to the contrary. As a result, a legal battle ensued as the church's finances struggled over leadership. The board fired the son, Joel as acting pastor in 2012, stripping him of membership and escorting him from the property.

Situations like this caused the congregation to take sides or move on to other churches. In this instance, the longer the issue remained unresolved, the more negative impact it had on the church administratively in the areas of church attendance which dwindled as well as subsequent financial difficulties. As a result, not only was the church negatively impacted, but the community and members are as well.

Theological Foundations

We have numerous instances in scripture where the issue of leadership succession is demonstrated. For this research, we will focus on Moses and Joshua. Joshua was prepared to lead the Israelites long before Moses passed the mantle. He is first mentioned in Exodus 17:8-16 as the commander of the Israelites during the battle with the Amalekites. His character and leadership skills stood out from the rest.

Moses understood how crucial it was to have a leader succeed him. In Numbers, he addressed the issue, asking God to "...set a man over the congregation, who may go out and before them and go in before them, who may lead them out and bring them in, that the congregation of the Lord may not be like sheep which have no shepherd." Numbers 27:16-17. Moses did not handpick Joshua as his successor. Instead, he sought God's guidance asking him

to appoint a leader to follow him. Moses exhibited several leadership qualities regarding succession. First, he recognized his mortality and initiated the succession plan. Leaders often delay or resist succession planning. They prefer not to deal with the issue because it reveals their mortality.⁵³ Second, Moses sought God's guidance. He did not choose his successor alone. He sought the wisdom and direction of God rather than relying on his own.

One may question why God did not choose Moses' son as his successor. At this point, we do not have the answer. For this research, we will address this issue as many leaders may wish to pass the legacy of the pastorate to their family members (i.e., son or daughter). However, that may not be God's plan.

In response to Moses' request, God instructed him to take Joshua and make him the new leader of Israel as his successor. God selected Joshua as the next leader of the nation of Israel.

¹⁸ And the LORD said to Moses: "Take Joshua the son of Nun with you, a man in whom *is* the Spirit, and lay your hand on him; ¹⁹ set him before Eleazar, the priest and before all the congregation, and inaugurate^[a] him in their sight. ²⁰ And you shall give *some* of your authority to him, that all the congregation of the children of Israel may be obedient.

Characteristics of Joshua which led him to leadership:

- Joshua was the only one who waited for Moses at the bottom of Mount Sinai. (Numbers 14:6) This shows the characteristics of dedication, belief, faith, acceptance of God's will as absolute, and the belief that when Moses promised something, he would follow through.
- When Moses' leadership was challenged, Joshua defended him. (Numbers 11:28). Such characteristic of leadership speaks of loyalty and dedication.
- Joshua and Caleb were the only spies who did not rebel against Moses' urge to enter Canaan.⁵⁴

⁵³ Vanderbloemen and Bird, 25.

⁵⁴ Frank, Natalie. Joshua: What We can Learn About Leadership. October 2018. Accessed from <https://owlcation.com/humanities/Joshua-and-The-Characteristics-of-Jewish-Leadership>

Such characteristics exhibited by Joshua made him God's choice to lead Israel into Canaan. Joshua was a likely choice since he had served Moses and worked closely with him for years. More importantly, he was a man of faith, and he possessed a shepherd's heart for the people.

Moses commissioned Joshua before the congregation to ensure there would be no issues or uprising from the people. This action was important because Moses had identified his successor before his death and demonstrated that he had confidence in Joshua and his leadership abilities. Such an act is of vital importance to our modern-day congregations. The Israelites were not blindsided by a new leader with whom they may not have prior experiences in dealing with being placed over them. The people of Israel were familiar with Joshua as he was one of the twelve spies who had not only spied out on Canaan, but he, along with Caleb, exhibited faith that Israel was able to conquer it. They were also more than likely familiar with Joshua's leadership style, as he was Moses' right-hand man. In answer to Moses' prayer, God appointed a successor, Joshua, who had long since signaled himself by his courage in fighting Amalek, his humility in ministering to Moses, and his faith and sincerity in witnessing against the report of the evil spies.

Although Moses was concerned and appointed his successor, the opposite happened at the end of Joshua's life. At the end of Joshua's life, the people and elders gathered for his farewell speech. One might have expected God to appoint a successor; however, that did not happen. It is important to note that at least scripturally, Joshua did not ask God to identify his successor. Also noted throughout Joshua's leadership, no one was set apart to assist him.

Joshua's leadership journey completely contrasted with that of Moses. Joshua delivered speeches reminding Israelites of God's goodness and faithfulness. He encouraged them to follow

Him and challenged them to remain faithful to the Lord lest they forfeit the opportunity to continue to reap His blessings. Though Joshua is noted as a good leader, he completely ignored the process of succession planning. If the key leader fails to select his replacement, there will be conflicts among the other leaders. While alive, Joshua and the Israelites focused on fighting. However, as soon as he died, the Israelites began the slow descent into mediocrity, ultimately dropping the leadership baton.⁵⁵ A sobering lesson from Joshua's legacy reminds us that leadership impartation entails godly living, careful instruction, and powerful exhortation. It requires cultivating convictions in others and teaching them how to know and serve the Lord.⁵⁶

The book of Judges does not record that Joshua did have a successor. This lack of leadership characteristic becomes a recurring theme in the book of Judges. The author raises the issue in the first verse of the book and summarizes the catastrophic result in the last verse of the book: "In those days there was no king in Israel; everyone did what was right in his eyes." (Judges 21:25). Even though Joshua failed to produce a leader to take his place, we see Caleb, the other great leader of Joshua's generation, calling forth individuals to lead God's people.⁵⁷

Succession Planning in the New Testament

The New Testament is not without its challenges and options for leadership succession. While the gospels do not directly address matters of succession, they do not neglect them.⁵⁸ The New Testament leaders starting with Jesus did not deviate from the norm of mentoring leaders

⁵⁵ Malone, Raymond. *The Joshua Dilemma*, 83.

⁵⁶ Risley, Scott, Dropping the Baton. Old Testament February 2016. Accessed January 2020 <http://bibleteachings.org/judges-11-210-dropping-the-baton/>

⁵⁷ Ibid.

⁵⁸ Tushima, Cephas, 2016, "Leadership Succession Patterns in the Apostolic Churches as a Template For Critique of Contemporary Charismatic Leadership Succession Patterns, *HTS Theological Studies* 72(1).

for leadership succession. A priority for Jesus was the recruitment of disciples even before he took his ministry to the public.⁵⁹

Jesus and the Disciples

Jesus initiated the process of succession planning for the Christian church by selecting and developing the disciples, who later selected and developed others. This process which was critical to the future of the early church is vital to all sustainable organizations.⁶⁰ Jesus prepared the disciples for leadership before His crucifixion. He understood that continuity in the ministry was paramount to effectively spreading the Gospel. Preparation was the key to ensuring that the disciples knew what was expected of them when He was gone. We as leaders must follow his examples of empowering others to perpetuate the Gospel.

The Apostle Paul

Timothy emerged as a protégé whom Paul loved and prepared to be his successor. Their relationship is a good example of New Testament leadership mentoring and succession. Paul recognized the importance of equipping a successor to carry on his leadership role after his own life and ministry was over.⁶¹

Paul established a framework for the selection and development of future Christian leaders. He set a precedent for core Christian values, established a competency model, and identified character expectations for Christian leaders. In essence, he created the first formal succession plan for the early Christian church.⁶² In its infancy, the New Testament church needed a clear

⁵⁹ Ngomane and Mahlangu, 1.

⁶⁰ Hollinger, 158.

⁶¹ Ngomane and Mahlangu, 3.

⁶² Hollinger, 158.

mission, consistent core values, and leadership grounded in the Christian faith. Paul's instructions, teachings, and leadership development efforts established a succession planning program to perpetuate these essential constructs.⁶³ The vision, mission, and purpose of the early church were centered on Jesus Christ. Leadership development focused on the ability of future leaders to teach and spread the Gospel of Jesus Christ through a process that reflected His righteousness and obedience to God. This involved training, coaching, and mentoring to support tactical application and strategic direction. Finally, the competency model for the early church set very high moral expectations for the experience, character, and capabilities of future leaders.

Theoretical Foundation

Although the central focus of this project is on pastoral leadership, it is important to understand the impact of succession planning on other organizations. "The succession crises in contemporary leadership are not limited to Christian ministries. The nation's largest and most influential corporations and institutions face similar challenges."⁶⁴ Previous studies and surveys indicated that many leaders are not versed in managing their successions and transitions. As a result, many organizations do little more than hope for the best. Further discussion will focus on how leaders in the business, non-profit, and private sectors handle succession planning and transition. Organizations use succession planning to prepare for inevitable transitions in leadership and put processes in place to develop skills and competencies in leaders.

⁶³ Ibid 160.

⁶⁴Mullins, 209.

Succession planning brings effective performance and assists organizations in the replacement and strategic application of key people. The objective is to ensure the availability of appropriate resources to fill vacant positions.⁶⁵

Succession Planning in the Public Sector

This section deals with succession planning within the public or government sector. According to the United States Census Bureau's Census of Governments report, the number of state and local government employees decreased by 0.2 percent in 2010 and 1.5 percent in 2011.⁶⁶ This decrease in the workforce stems from multiple factors, such as early retirement incentives, government downsizing, and private sector opportunities. Succession planning from the governmental perspective is defined as a proactive process that begins developing successors years in advance of when they will be needed. It accounts for the fact that eventually there will be changes in leadership in an organization.⁶⁷ With older employees in leadership positions looking forward to retirement, organizations need to develop strategies to ensure they find the best candidates to fill those roles. Government organizations' initial reaction to replacing new leaders would be to look externally. However, they may be better served to seek replacements within its internal talent pool. Effective succession planning is an integral part of a government organization's plan for sustainability and continuity.

Key strategies that governmental organizations utilize in succession planning activities include:

⁶⁵ Zulqurnain and Aqsa, 56.

⁶⁶ Patel, Digesh. *The Importance of Succession Planning in Government*. February 2014.

⁶⁷ Hove.

- (1) Training allows organizations to provide employees with information that will allow them to perform their current job duties in the most efficient way possible. It can empower employees to advance into new positions with increasing roles and responsibilities. Training allows governmental employees the opportunity to become marketable in advancing their careers in areas that would not be attainable without the required training.
- (2) Coaching and mentoring implementation are increasingly utilized in succession planning. This strategy allows for ‘seasoned veterans’ of the organization to work with the next generation. This climate allows employees to impart their knowledge regarding the organization’s culture, work policies, and procedures to the next generation.
- (3) Performance evaluation is instrumental in assessing employees’ performance ensuring that the current workforce is strategically aligned with the organization’s competency framework.
- (4) Knowledge management is a strategy that allows for the transfer of organizational knowledge which focuses on retaining institutional memory and proprietary knowledge that can be lost when experienced workers depart the organization.

An effective succession plan within the government sector

- Is one of the most useful tools to prevent interrupted operations when a key role in the organization becomes vacant.
- Identifies and develops future leaders consistent with the organizational mission and strategic goals.
- Helps ensure the pool of future leaders feels seen, valued, and more willing to stay with the organization that moves to another agency to further develop their careers.⁶⁸

⁶⁸ Hove.

Governmental agencies develop succession plans to describe what must be done and why there is a leadership transition. However, it is estimated that forty percent of government agencies do not have a succession plan. Governmental agencies define succession planning as a proactive process that begins developing potential successors years before they will be needed. Such a process accounts for the fact that eventually, there will be changes in agency leadership. Executive leaders have the foresight that such transition is inevitable, and planning for such transition equips the organization to continue meeting its goals and objectives uninterrupted.

Succession Planning in the Private Sector

The lack of succession planning at some public companies poses a serious corporate threat to their organizational health. Also, the lack of a truly operational succession plan can have devastating financial consequences for companies.⁶⁹ Unfortunately, many boards do not have a formal succession planning process, and, as a result, many operate reactively rather than proactively.⁷⁰ Heidrick & Struggles indicate that “high-functioning boards focus on three critical steps in their succession planning process. These steps include reviewing the board's current composition against strategic objectives, evaluating, agreeing on future needs, and recruiting and retaining new directors with diverse backgrounds and strategic objectives. By focusing on these steps, members are in a position to effectively develop a robust and strategic succession plan that will help them future proof not only the board but the entire organization.”⁷¹

⁶⁹ Larcker, David F. and Stephen Miles. *Heidrick & Struggles: 2010 Survey on CEO Succession Planning*. Rock Center for Corporate Governance. GSB.Stanford.edu. June 2010, 2.

⁷⁰ Gwin, Bonnie W., and Jeff Sanders, *Board Succession 2020: Three Steps Toward Long Term Effectiveness*. Hendrick & Struggles (CEO & Board Practices). Accessed from Deidrick.com.

⁷¹ *Ibid.*

Non-Profit Organizations

It is estimated that sixty-five percent of non-profit organizations have no succession plan to replace senior leadership. “When non-profit organizations have not done succession planning and a new successor takes over for a longstanding Chief Executive Officer (CEO), they often feel ill-prepared and overwhelmed.” A lack of strong, consecutive leadership can prove catastrophic for non-profits. The *2014 Report on Senior Executive Succession Planning and Talent Development Study* conducted by the Corporate Governance at Stanford University showed that only fifty-four percent of boards were in the process of grooming a CEO successor.⁷² The same study showed that thirty-nine percent of companies had not identified viable candidates to replace the CEO if needed.⁷³ Leaders of many non-profits tend to experience long tenures, resulting in long and painful transitions when the leaders leave the organization. Quality succession planning not only reduces the transition time but is effective in easing the emotional and painful transition experienced.

It is noted that boards do not often have leadership transition plans because they have not made it a priority. For example, boards may not feel an urgency to address succession planning simply because their leaders have a history of serving for long periods. Another reason is that board members (many of who are volunteers) do not have the time, knowledge, or experience to take on the task of selecting a successor; few non-profits offer professional development or leadership training, which are typically viewed as luxuries.⁷⁴

⁷² Larcker, David F. and Scott Saslow. *2014 Report on Senior Executive Succession Planning and Talent Development*. Stanford University.

⁷³ Ibid.

⁷⁴ Boston Globe. Many Nonprofits Lack Leadership Succession Plans, Survey Finds. May 19, 2015.

Executive succession planning is a method for ensuring leadership continuity in key positions while preserving and developing knowledge capital and relationships for the future.⁷⁵ It assesses current organization needs and creates a climate for an executive to succeed. An effective succession plan is linked to the organization's strategic plan, mission, and vision. Effective succession planning increases the likelihood that a non-profit will have the strong leadership required to increase an organization's service capacity, program effectiveness, and long-term- stability and sustainability.⁷⁶

An effective, successful planning process requires collaboration between board members, the incumbent, and key staff members. The planning should be completed, and a plan adopted in advance of any departures. This process will create a strong foundation and conditions for a successful executive leadership transition. Success depends on defined roles and responsibilities among the board, leadership, and staff. Properly outlining and documenting responsibilities and communicating them before the planning process will alleviate concerns among those involved. According to various surveys and assessments, it is noted that despite the retirement of non-profit executives, numerous non-profit organizations lack a formal succession plan.⁷⁷ Notably, many leaders who have anticipated leaving their current positions have not considered the strategy of who will succeed them at the leadership helm. Sixty percent of respondents surveyed acknowledged "not having a formal succession plan in place." Such actions have a sobering effect on the organization, its mission, vision, and those left behind. "A strong non-profit leader is critical to the success of organizations, its ability to continue providing uninterrupted services

⁷⁵ Nonprofit Executive Succession Planning Toolkit.

⁷⁶ Nonprofit Executive Succession Planning Toolkit. 5.

⁷⁷ Many Nonprofits Lack Leadership Succession Plans, Survey Finds. May 19, 2015.

to the community, and for long-term sustainability. Yet, assessments reveal that sixty-eight percent of organizations lack a succession plan to get them through a leadership transition.⁷⁸

Within many non-profits, succession is a difficult subject to approach, especially among leaders who have been in their position for a considerable time. Many leaders may feel that their organizations (especially those who have been with the organizations since its inception) may feel that ‘their baby’ is best in their hands. Barriers to the successful implementation of a succession plan in a non-profit organization include:

- Lack of time to dedicate to a planning process.
- The board understands neither the implementation of not having a succession plan nor the potential of going out of business without a competent leader.
- The executive may be apprehensive about starting a process that could be easily replaced.
- Concerns that identifying internal successors may alienate staff not selected who could become unhappy and leave.
- The succession plan is not customized to meet the organization’s cultural norms.
- There is no follow-through on the plan, and no one is accountable for implementation.
- Focusing on short-term talent rather than long-term. As a result, placements fill current needs rather than positions that can positively impact the organization's long-term needs.⁷⁹

Years of institutional knowledge usually leave with long-term CEOs. Such departure may cause a decline in staff productivity and donations. Such issues place the organization’s mission and the people it serves at risk.

⁷⁸Federal Reserve Bank of Kansas City, *Nonprofit Executive Succession Planning Toolkit*.

⁷⁹ Nonprofit Executive Succession Planning Toolkit, 15.

Literature Review

This section will discuss the review of various types of literary works which are not just related to succession but also the theology of leadership, a theology of succession, and how the church can effectively develop strategies for a plan to ensure a smooth transition. Resources selected and reviewed were invaluable in providing the foundation for leadership and succession they are gleaned from private, public, and financial sectors. Works were also instrumental in providing the lessons learned by organizations and their respective management teams in establishing succession planning strategies.

Articles

Beery, Kevin. "The Value of Succession Planning in the Church." *Enrichment Journal Online*.

January 2011. The article provides the foundation definition and benefits of succession planning.

Bird, Warren. "How Pastors Are Passing the Leadership Baton." November 2014 *Christianity*

Today. The article discusses the nuances of church leaders who may not discuss their succession strategy with their church leaders and board members in detail. The article draws upon real-life church experiences providing the disadvantages of leaders' inability to prepare the next generation for leadership.

Dollhopf, E. J & Scheitle C. "Decline and Conflict: Causes and Consequences of leadership

Transitions in Religious Congregations." *Journal for the Scientific Study of Religion*

(2013) Vol 52 No 4 675-697. The resource discusses leadership transition strategies within religious congregations. It discusses the challenges church leadership will face based on relationships and the spiritual dimensions of their position within the congregation.

Groves, Kevin S. Integrating Leadership Development and Succession Planning Best Practices.

Vol 26, No 3, 2007. 239-260. The article provides best practices on leadership development and succession planning in the private sector.

Harris, Hamil R. “MD Judge Rules Against Bishop Peebles’ Supporters Hoping to Oust

Disputed Board.” *Washington Post*. February 2014. The newspaper article described court actions and decisions when a succession plan was not in place. It reveals the negative impact of the lack of a succession plan on the congregation and leadership.

Heath, Jane. “Moses' End and the Succession: Deuteronomy 31 and 2 Corinthians 3,” *New*

Testament Studies. Vol 60, No 1 37-60. The article provides the biblical foundation on leadership succession using the examples of Moses and Joshua.

Hollinger, Thomas D. “Leadership Development and Succession Planning: A Biblical

Perspective for An Ethical Response.” *Journal of Biblical Perspectives in Leadership*. 5, No 1 (2013), 157-164. This resource focuses on the Apostle Paul’s leadership example of succession planning and management based on his Pastoral Epistles to Timothy and Titus. Paul provided what the authors consider the first formal succession plan for the early church. The article stresses the importance of developing a viable succession plan for today's contemporary church.

Huizing, R. L. “Bring Christ to the Table of Leadership: Moving Towards a Theology of

Leadership.” *The Journal of Christian Leadership*. Vol 5, No. 2. 58-75. The article provides a theology of scripture-based, God-governed, and Christ-centric leadership.

Kaplan, Robert Steven. “What to Ask the Person in the Mirror.” *Harvard Business Review*,

(January 2007). The article provides insight into how organizational leadership can prepare the next generation for the mantle to lead.

Luna, G. “Planning for An American Higher Education Leadership Crisis: The Succession Issue for Administrators.” *International Leadership Journal*. Vol. 4, No. 1. (2012) 56-79.

Resource documents the issues of succession planning in academia. It highlights the issues lacking in higher learning central to leadership succession. It provides examples of the lack of succession planning within private sectors.

McKenna, Patrick. “Leadership Transition Misfires: Why Succession Planning Matters.” *OF Counsel*. 37(5) May 2018. Pp 8-13. The article discusses the importance of succession planning. It also highlights issues organizations face when leaders transition.

Nogmane, Richard & Elijah Mahlangu. “Leadership Mentoring and Succession in the Charismatic Churches in Bush Buckridge.” *Herbomde Teologiese Studies*. 2017 Vol 70, No 1. 1-10. The article explores the state of leadership mentoring and succession planning programs in charismatic churches.

NRB.ORG. Charles Stanley Presents Pastoral Succession Plan to Church. January 4, 2018. The article outlines how Charles Stanley introduced his plan of succession to First Baptist. It is an example of pastors and churches who have a succession plan in place and the positive impact on the congregation and their acceptance of the successor.

Patterson, Stanley. “Biblical Foundations of Christian Leadership, Part 1”. *The Journal of Applied Christian Leadership*. Vol. 10, No. 2 (2016) 78-89. The article provides a theology of leadership foundations as documented in the First Century Church. It explains the essential nature of Christian leadership as service apart from the position of leadership. It provides the foundation of how today's leaders should serve their local congregations and communities.

Patterson, Stanley. "Biblical Foundations of Christian Leadership, Part 2". *The Journal of Applied Christian Leadership*. Vol 11, No 1 (Spring, 2017), 80-94. The article provides a theology of leadership foundations as documented in the First Century Church. It explains the essential nature of Christian leadership as service apart from the position of leadership. Finally, it provides the foundation of how today's leaders should serve their local congregations and communities.

Poeschl, Alexander. "The Way Toward a New Entrepreneurial Balance in Business Succession Processes: The Case of Management Buy-Ins." Vol. 33, No. 1, 2020. The article provides insight into the succession process in the family business.

Reed, Marlene, and William Worthington. "Marketplace Ministries: Planning for Succession." *Journal of Ethics & Entrepreneurship*. 6(1) Spring 2016, pp 39-63. The article is a case study of Marketplace Ministries and leadership challenges experienced during the leadership transition of its founder. It documents issues with succession as experienced by the organization and highlights characteristics leaders should look for in potential successors.

Shellnutt, Kate. "Willow Creek Chooses Co-Ed Pastors to Succeed Bill Hybels." *Christianity Today*. June 2018. This article demonstrates how Willow Creek chose and introduced its pastoral successor.

Tushima, Cephas. "Leadership Succession Patterns in the Apostolic Church as a Template for Critique of Contemporary Charismatic Leadership Succession Patterns." *HTS Theological Studies*. Vol 7, No 1. pp 1-8. The article explores the biblical sources of leadership succession, first examining leadership structure and then patterns within the

apostolic church during the first century. The resource provides the background of the process early apostolic leaders utilized in selecting their successors.

VanVactor, Jerry D. "The Challenge of Success: Allowing Leaders to Lead." Vol. 7, No. 3, 2011. The article discusses succession planning and management within the public sector. It highlights effective succession management and transition and the positive impact on the organization.

Zivotofsky, Ari Z. "The Leadership Qualities of Moses." *Judaism*. Summer, 1994 Vol 43, No. 3, 258-269. The article focuses on Moses' leadership qualities before his appointment by God to lead the children of Israel from Egypt.

Zuiqurnain, Ali and Mehreen Aqsa. "Understanding Succession Planning as a Combating Strategy for Turnover Intention Turnovers." *Journal of Advances in Management Research*. 2019 Vol. 16, No. 2, 216-233. The article provides a basis for how succession planning impacts leadership turnover within the banking industry. It will also provide a foundation for the value and impact succession planning has on the organization.

Books

Blanchard, Ken and Phil Hodges. *Lead Like Jesus*. Nashville: Thomas Nelson Publishing, 2005. Provides the theological foundation of leadership using Jesus' leadership methods in the New Testament. In addition, it provides the foundation of Jesus' relationship with the disciples as he provided training, encouragement, and empowerment before sending them on the Great Commission.

Flowers, Andrew. *Leading Through Succession: Why Pastoral Leadership is the Key to a Healthy Transition*.

Forman, Rowland, Jones, Jeff, and Miller, Bruce. *The Leadership Baton: An Intentional Strategy for Developing Leaders in Your Church*. Grand Rapids: Zondervan, 2004. The resource provides a strategy for leaders to identify potential successors and develop leadership training programs within their ministries.

Gangel, Kenneth O. *Feeding & Leading. A Practical Handbook on Administration in Churches and Christian Organizations*. Grand Rapids: Baker Books. 1986. The resource provides spiritual foundations of leadership strategies that benefit pastoral leaders.

Getz, Gene. *Elders and Leaders: God's Plan for Leading the Church. A Biblical, Historical and Cultural Perspective*. Chicago: Moody Publishers. 2003. This resource provides a biblical pattern and foundation for church leadership.

Howell, Don N. *Servants of the Servant: A Biblical Theology of Leadership*. Eugene: Wipf & Stock Publishers. 2003. This resource provides a biblical pattern and theology of Christian leadership. It serves as a basis for leadership from a biblical perspective, drawing on leader characteristics from scripture.

Laniak, Timothy S. *Shepherds After My Own Heart: Pastoral Traditions and Leadership in the Bible*. Downers Grove: Intervarsity. 2006. This resource provides a theological and biblical background of leadership.

MacArthur, John. *The Book on Leadership*. Nashville: Thomas Nelson Publishing. 2004. The resources provide a leadership foundation for leaders drawing upon the experiences of the Apostle Paul.

Malone: Raymond. *The Joshua Dilemma*. Dallas: St. Paul Press. 2017. The resource provides an in-depth look at leadership dynamics through Biblical leaders who were placed under

the mantle of leadership and how they handled the process of succession and biblical mentorship.

Malphurs, Aubrey. *Being Leaders: The Nature of Authentic Christian Leadership*. Grand Rapids: Baker Books, 2003. The resource provides a leadership definition drawing upon a biblical foundation. It assists in laying the Biblical foundation of pastoral leadership.

Malphurs, Aubrey. *Leading Leaders. Empowering Church Boards for Ministry Excellence*. Grand Rapids: Baker Books, 2005. The resource provides strategies for creating and maintaining an effective church leadership team that is spiritually equipped and properly trained to lead.

Munroe, Myles. *The Spirit of Leadership*. New Kensington: Whitaker House, 2005. The resource provides a theological and practical foundation by Myles Munroe on leadership.

Vanderbloemen, William and Warren Bird. *Next: Pastoral Succession That Works*. Grand Rapids: Baker Books, 2015, 2020. The resource provides the foundational basis for effective succession planning. The authors rely on case studies that stress the importance of leaders completing the succession planning process and establishing the basis for succession planning.

Watkins, Ralph C. *Leading Your African American Church through Pastoral Transition*. Valley Forge: Judson Press, 2010. The resource is written for pastors and church leaders who have the responsibility of ushering a congregation through a pastoral transition strategy.

Weese, Carolyn, and J. Russell Crabtree. *The Elephant in the Boardroom: Speaking the Unspoken About Pastoral Transitions*. San Francisco: Jossey Bass, 2004. The resource examines strategies to effectively develop plans for succession for the church. It provides

strategies church leadership can utilize to identify their church culture and create a succession plan to meet their congregational needs and culture.

Dissertations

Chapman, Darius Mason. *Succession Planning in the Religious Non-Profit Sector:*

Understanding Associate Pastors' Experiences of Serving as Internal Interims. Human Resource Development Theses and Dissertations. 2017. The dissertation explores those instances where succession planning was not in place, and the interim pastors serve as interims. It provides instances where succession and transition plans were not in place and impacted leadership teams and congregations.

Hartley, Clifford. *About My Father's Business: Pastoral Succession from Father to Son.* Liberty

Baptist Theological Seminary. Ann Arbor: ProQuest LLC. 2012. The dissertation provides the foundation of succession planning. It discusses the value of succession planning for organizations to ensure that their vision survives leadership transition. It provides the basis for effectively planning for the senior pastor's transition in this case from father to son. It will also provide tips from the business perspective to ensure a smooth transition.

Johnson, Prentis V. *Exploring Leadership Succession Planning for Pentecostal Church Pastors*

and Leaders: A Generic Qualitative Inquiry Study. Capella University. November 2017. The dissertation explores the impact of the lack of leadership succession planning of pastors on Pentecostal churches. It captures the factors which contribute to a smooth pastoral transition.

Robinson, Kyle J. *Distributed Succession: Managing the Transition of Multi-Site Campus Pastors*. Creighton University, 2017. The dissertation provides case studies of churches' experiences implementing succession plans across multi-site campuses.

Vester, Robert W. *First Succession: From a Founding Long Term Pastor to Second Pastor*. Asbury Theological Seminary. ProQuest Dissertation Publishing. 2016. The dissertation explores the impact of succession planning on churches where the founding pastor succeeded. It provides the foundation for the different aspects of succession planning on differing scenarios.

Websites

Frank, Natalie. *Joshua: What We Can Learn About Leadership*. 2018. The resource provides background on Joshua's leadership qualifications which made him choose to succeed Moses as the leader of the nation of Israel.

Moffic, Evan. *What Moses Teaches Us About Leadership Transition*. The resource provides the foundation for how Moses prepared for his leadership transition to Joshua.

Munroe, Myles. *Mentoring and Succession*. <https://munroeglobal.org>. Provides teachings on the importance of spiritual leaders planning for their succession and transition through mentoring.

Planning and Implementing Successful Pastoral Succession. It provides the foundation for the importance of succession planning for healthy churches. Articles draw on various case studies for those churches that were successful in their implementation. Downloaded from: Training Leaders for Healthy Churches. www.lovelaceleadership.org

Scriptures

Numbers 27:18-23 ¹⁸So the LORD said to Moses, "Take Joshua, son of Nun, a man in whom is the spirit of leadership, and lay your hand on him. ¹⁹Have him stand before Eleazar, the priest, and the entire assembly and commission him in their presence. ²⁰Give him some of your authority so the whole Israelite community will obey him. ²¹He is to stand before Eleazar the priest, who will obtain decisions for him by inquiring of the Urim before the LORD. At his command, he and the entire community of the Israelites will go out, and at his command, they will come in." ²²Moses did as the LORD commanded him. He took Joshua and had him stand before Eleazar, the priest, and the whole assembly.²³ Then he laid his hands on him and commissioned him, as the LORD instructed through Moses. The above scriptures describe the importance of the previous leader, Moses inaugurating Joshua as his successor in the presence of Israel, which ensured a smooth transition in leadership.

Deuteronomy 3:23-29: ²³ And I besought the LORD at that time, saying,²⁴ O Lord GOD, thou hast begun to shew thy servant thy greatness, and thy mighty hand: for what God is there in heaven or the earth, that can do according to thy works, and according to thy might? ²⁵ I pray thee, let me go over and see the good land that is beyond Jordan, that goodly mountain, and Lebanon. ²⁶ But the LORD was wroth with me for your sakes, and would not hear me: and the LORD said unto me, "Let it suffice thee; speak no more unto me of this matter." ²⁷ Get thee up into the top of Pisgah, and lift up thine eyes westward, and northward, and southward, and eastward, and behold it with thine eyes: for thou shalt not go over this Jordan. ²⁸ But charge Joshua, and encourage him, and strengthen him: for he

shall go over before this people, and he shall cause them to inherit the land which thou shalt see. ²⁹ So we abode in the valley over against Bethpeor.

Deuteronomy 31: 6-8 ⁶Be strong and courageous. Do not be afraid or terrified because of them, for the LORD your God goes with you; he will never leave you nor forsake you." ⁷Then Moses summoned Joshua and said to him in the presence of all Israel, "Be strong and courageous, for you must go with this people into the land that the LORD swore to their ancestors to give them, and you must divide it among them as their inheritance. ⁸The LORD himself goes before you and will be with you; he will never leave you nor forsake you. Do not be afraid; do not be discouraged." The above scriptures describe the succession and instruction Moses received from God regarding Joshua replacing him in leading the children of Israel.

Deuteronomy 34:9 - Now Joshua, son of Nun, was filled with the spirit of wisdom because Moses had laid his hands on him. So, the Israelites listened to him and did what the LORD had commanded Moses.

Judges 8:22-23 ²²Then the men of Israel said unto Gideon, "Rule thou over us, both thou, and thy son, and thy son's son also: for thou hast delivered us from the hand of Midian."²³And Gideon said unto them, I will not rule over you, neither shall my son rule over you: the LORD shall rule over you.

1 Kings 19:16-19: ¹⁶ And Jehu the son of Nimshi shalt thou anoint to be king over Israel: and Elisha the son of Shaphat of Abelmeholah shalt thou anoint to be prophet in thy room. ¹⁷ And it shall come to pass, that him that escapeth the sword of Hazael shall Jehu slay: and him that escapeth from the sword of Jehu shall Elisha slay. ¹⁸ Yet I have left me seven thousand in Israel, all the knees which have not bowed unto Baal, and every mouth

which hath not kissed him. ¹⁹ So he departed thence and found Elisha the son of Shaphat, who was plowing with twelve yokes of oxen before him, and he with the twelfth: and Elijah passed by him, and cast his mantle upon him.

Proverbs 11:14: ¹⁴ Where no counsel is, the people fall: but in the multitude of counselors there is safety

Proverbs 16:12 - ¹² It is an abomination to kings to commit wickedness: for the throne is established by righteousness.

Proverbs 18:21 - Death and life are in the power of the tongue, and those who love it will eat its fruit.

Proverbs 21:23: ²³ Whoso keepeth his mouth and his tongue keepeth his soul from troubles.

Isaiah 6:8-9 ⁸ Also I heard the voice of the LORD, saying, whom shall I send, and who will go for us? Then said I, here am I; send me. ⁹ And He said, Go, and tell this people, hear ye indeed, but understand not; and see ye indeed, but perceive not.

Matthew 28: 19-20 ¹⁹ Therefore go and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, ²⁰ and teaching them to obey everything I have commanded you. And surely, I am with you always, to the very end of the age."

Matthew 20:26 But it shall not be so among you: but whosoever will be great among you, let him be your minister

Matthew 24:45-47: ⁴⁵ Who then is a faithful and wise servant, whom his lord hath made ruler over his household, to give them meat in due season? ⁴⁶ Blessed is that servant, whom his lord when he cometh shall find so doing. ⁴⁷ Verily I say unto you, that he shall make him ruler over all his goods.

Mark 3:14 – Captures Jesus’ training method. “He appointed twelve ...that they might be with him and that he might send them out to preach.”⁸⁰

Luke 12:48: ⁴⁸ But he that knew not, and did commit things worthy of stripes, shall be beaten with few stripes. For unto whomsoever much is given, of him shall be much required: and to whom men have committed much, of him, they will ask the more.

Luke 22:26 - ²⁶ But ye shall not be so: but he that is greatest among you, let him be as the younger; and he that is chief, as he that doth serve.

John 20:19-23: ¹⁹ Then the same day at evening, being the first day of the week, when the doors were shut where the disciples were assembled for fear of the Jews, came Jesus and stood in the midst, and saith unto them, Peace be unto you. ²⁰ And when he had so said, he shewed unto them his hands and his side. Then were the disciples glad when they saw the LORD. ²¹ Then said Jesus to them again, “Peace be unto you: as my Father hath sent me, even so send I you.” ²² And when he had said this, he breathed on them, and saith unto them, Receive ye the Holy Ghost: ²³ Whose soever sins ye remit, they are remitted unto them; and whose soever sins ye retain, they are retained.

Acts 16:1-4 ¹ Paul came to Derbe and then to Lystra, where a disciple named Timothy lived, whose mother was Jewish and a believer but whose father was a Greek. ² The believers at Lystra and Iconium spoke well of him. ³ Paul wanted to take him along on the journey, so he circumcised him because of the Jews who lived in that area, for they all knew that his father was a Greek. ⁴ As they traveled from town to town, they delivered the decisions reached by the apostles and elders in Jerusalem for the people to obey.

⁸⁰Forman, Rowland. *The Leadership Baton*.

Acts 20:28 ²⁸ Take heed therefore unto yourselves, and to all the flock, over the which the Holy Ghost hath made you overseers, to feed the church of God, which he hath purchased with his own blood.

Romans 12:8 ⁸ Or he that exhorteth, on exhortation: he that giveth, let him do it with simplicity; he that ruleth, with diligence; he that sheweth mercy, with cheerfulness.

Ephesians 4:11-12: And he gave some apostles; and some, prophets; and some, evangelists; and some, pastors, and teachers; ¹² For the perfecting of the saints, for the work of the ministry, for the edifying of the body of Christ:

Philippians 2:3-4: Let nothing be done through strife or vainglory; but in lowliness of mind let each esteem other better than themselves. 4) Look not every man on his own things, but every man also on the things of others.

I Timothy 2:1-2: I exhort therefore, that, first of all, supplications, prayers, intercessions, and giving of thanks, be made for all men; ² For kings, and for all that are in authority; that we may lead a quiet and peaceable life in all godliness and honesty.

1 Timothy 5:17-22 ¹⁷ Let the elders that rule well be counted worthy of double honour, especially they who labour in the word and doctrine. ¹⁸ For the scripture saith, thou shalt not muzzle the ox that treadeth out the corn. And the labourer is worthy of his reward. ¹⁹ Against an elder receive not an accusation, but before two or three witnesses. ²⁰ Them that sin rebuke before all, that others also may fear. ²¹ I charge thee before God, and the Lord Jesus Christ, and the elect angels, that thou observe these things without preferring one before another, doing nothing by partiality. ²² Lay hands suddenly on no man, neither be partaker of other men's sins: keep thyself pure.

2 Timothy 2:2: ² And the things that thou hast heard of me among many witnesses, the same commit thou to faithful men, who shall be able to teach others also.

Titus 1:7-9 ⁷ For a bishop must be blameless, as the steward of God; not self-willed, not soon angry, not given to wine, no striker, not given to filthy lucre; ⁸ But a lover of hospitality, a lover of good men, sober, just, holy, temperate; ⁹ Holding fast the faithful word as he hath been taught, that he may be able by sound doctrine both to exhort and to convince the gainsayers.

Titus 2:7-8: ⁷ In all things shewing thyself a pattern of good works: in doctrine shewing uncorruptness, gravity, sincerity, ⁸ Sound speech, that cannot be condemned; that he that is of the contrary part may be ashamed, having no evil thing to say of you.

1 Peter 5:2-4 ² Feed the flock of God, which is among you, taking the oversight thereof, not by constraint, but willingly; not for filthy lucre, but of a ready mind; ³ Neither as being lords over God's heritage, but being ensamples to the flock. ⁴ And when the chief Shepherd shall appear, ye shall receive a crown of glory that fadeth not away.

Chapter 3:

Methodology

The main purpose of this qualitative research was to explore and research the lack of succession planning and transition strategies in our local churches. Pastors are leaving their respective pulpit and leadership positions due to aging, sickness, or retiring from the pastorate. This study answered research questions using a qualitative approach which was utilized to gain an increased knowledge and understanding of leadership succession, processes, and planning. The qualitative research methodology design provides strong support to the lives and experiences of pastors and leaders when gathering information on succession planning. The qualitative research design methodological approach was selected for this study because of the subjectivity and experiential nature of respondents' succession planning and leadership transition experience. This approach is essential to obtaining increased knowledge, understanding, and new ideas on the subject of pastoral succession and transition.

Data collection was conducted through open-ended questions and interviews conducted in person or telephonically and utilizing online survey tools of more than twenty pastors and ministry leaders. Some respondents had experienced pastoral transition, while others were first-time pastors. Data were analyzed for repetition, similarities, and patterns from the respondents. Challenges, practices, and processes central to the lack of pastoral succession planning are documented. The intention, in any case, was to glean the experiences and lessons learned regarding the topic of pastoral transition and succession.

What is Qualitative Research?

Qualitative research relates to the exploration of how we encounter our world. The focus of this project is relative to how ministerial leaders or pastors encounter their roles and how they

handle the future of the organization they are responsible for. Qualitative research takes the human experience seriously and seeks to understand and interpret the narrative of the hows and whys in answering the questions presented.

Merriam describes five characteristics of the qualitative research framework:

1. it elicits an understanding and meaning of the researcher as the primary instrument of data collection and analysis
2. it relies on the use of fieldwork
3. it is an inductive orientation to analysis
4. its findings are richly descriptive⁸¹

Qualitative research seeks answers by examining various social settings and the individuals who inhabit these settings. It is grounded in the social world of experience and seeks to make sense of lived experiences.⁸²

In this study, the qualitative research methodology will test the hypothesis that while effective succession planning is paramount and essential to the health and future of organizations. (i.e., churches), many leaders do not conduct such planning formally, if at all. As pastors will transition from the pulpit at one time or another, it is important to have a strategy in place to ensure a smooth transition of leadership and provide the foundation for the continuity of the church. Without a succession plan or strategy, the organization is bound to fail to achieve its vision and objectives. The absence of a succession plan will also leave leadership teams uncertain of the direction the church should go.

This research project sought to survey African American pastors from various churches within the Maryland, Virginia, and Washington, DC areas and across differing denominations. However, she was intentional to reach out and researching other ethnicities and racial divides to

⁸¹ Merriam, *Qualitative Research*, 11.

⁸² Sensing, Tim, *Qualitative Research: A Multi-Methods Approach to Projects for Doctor of Ministry Theses*, (Oregon, WIPF & Stock, 2011), 57.

glean an understanding of how leaders across the spectrum handled their transition. To glean a grasp of succession practices, the researcher reached out to three groups of potential respondents:

- those who had successfully left their previous pulpits and moved on to another part of the ministry.
- those whose current pulpit assignment had been passed on from their father.
- those whose previous pastor passed away or became incapacitated to lead.

These scenarios are vital to this research because they provide succulent background and experience from those entities where there was or was not a succession plan and how that situation was handled by the leadership and congregation. The causes and effects of each situation will be investigated. The research will augment the knowledge of succession planning, its processes, and its importance to leaders in preparing their congregations and leadership teams for the nuances of leadership transition and succession. It will provide opportunities for leaders who may not have considered the topic and developed viable strategies for their specific ministries. It intends to cause leaders to at least think about the impact of having a plan in place will have on the future of the ministry.

The instruments used for this project included semi-structured interviews and online surveys. The interviews were conducted using a questionnaire of open-ended questions. Some interviews were conducted face-to-face, while others were conducted telephonically. Telephonic interviews were recorded with the approval of the respondents and later transcribed. The initial survey questions were posed to respondents and pertinent follow-up questions for clarification. The researcher believed that respondents would respond better to online surveys and that many would feel more at ease completing the questions rather than conducting a face-to-face interview. Despite sending out emails to over thirty potential respondents, few participated. However, the researcher felt that many respondents did not respond to the surveys because they either did not have succession plans in place or were not comfortable discussing the topic.

Information was gathered from twelve surveys. The range of the experience from the online survey respondents was from ten years as a leader with little to no experience in the succession process to twenty years as a Pastor with minimal experience in the succession process.

One-line surveys were conducted within three months to encourage consistency. After the researcher gathered additional responses and completed the research utilizing telephone interviews; each interview was conducted over the phone, at the interviewee's convenience. Conversations were scheduled for fifteen minutes, and interviews were recorded to allow for in-depth analysis later; this process afforded the researcher the opportunity to better engage with the interviewee in the questioning and feedback process. It also allowed helped in answering any questions or feedback. Survey material, recordings, and interviewer notes were analyzed. This information will be further discussed in Chapter 4.

Potential respondents who responded to the introduction email were forwarded information regarding the project and provided the initial survey link. As the survey is anonymous, personal, and church information has been stripped, and they have been assigned a unique identifier code. Initially, emails were sent to twenty-five potential respondents. Only eight responded. The researcher feels that many potential respondents did not respond because they are unfamiliar with succession planning or do not believe that succession planning is a viable option in the transition of church leadership.

One of the respondents addressed this issue and concluded that many pastors do not feel that succession planning is biblical. Also was discussed why many pastors stay in the pulpit for as long as they do. In addition, pastoring is their full-time job and the only source of income for many. Many pastors have not taken the time to plan for their retirement financially.

Intervention Design

The research proposal was developed, and research was initiated when approval from the Institutional Review Board (IRB) was received. A copy of the IRB approval is located in Appendix A.

The sampling included participants who are pastors or have been pastors with considerable experience in leading congregations. Pastors were contacted from the Pentecostal Assemblies of the World (PAW) and Virginia State Council (VSC), of whom Zion Apostolic is a member. The purpose was to glean from churches how they specifically handled the transition of pastors within their congregations and managed the succession process. Participants included pastors, leaders who served on the church governance board, and pastoral team members. The researcher deliberately included pastors who had completed the succession and transition process in the respondent pool. Their experience and lessons learned were invaluable to this research. Additional potential respondent information was gathered from potential participants to ensure a robust pool of survey participants was recognized. The initial pool of survey participants was fifteen.

The primary method of data collection was online surveys. Initial contact was made with potential participants via electronic mail requesting their participation. Each participant was contacted through electronic mail with an introduction and a synopsis of the project research report from the researcher. The introduction email provided background on the topic of succession planning, requesting their participation, and a link to the online survey tool. Upon responding to the online survey, participants consented to participate in the survey. They answered questions regarding their time in leadership and other questions centric on pastoral leadership, pastoral training, and succession planning.

Participants were selected through the researcher's knowledge and from those affiliated with the various organizations. The researcher accessed church member lists from the organizations to obtain additional contact information for the pastors within each organization. Emails of introduction were sent to the potential respondents requesting their participation. Additional potential participants were recruited from social media platforms such as Facebook and from participants from the online survey whom respondents felt could add value. Open-ended semi-structured questions were used for data collection. Follow-up contact was conducted via electronic mail.

Follow-up interviews were conducted within two weeks with persons requiring additional information or clarification to answer the online survey. Interviewees who had experienced a succession process were asked the following questions:

- *What would you have done differently regarding your specific transition? Why?*

In some instances, where distance was a factor (i.e., the participant was overseas), electronic mail was the venue of choice for follow-up. In addition, each participant was allowed to provide other ministry persons they felt could provide succulent information and data for the research.

Copies of succession plans received will become part of the final research study minus all identifying information from the respondents upon approval. To date, no copies of succession plans have been received. Data collected will compare churches that have successfully utilized a succession plan by documenting the positive and negative impacts on the congregation. Data on lessons learned will also be gathered from the positive and negative experiences of those surveyed and from additional research.

The following is a summary of the chapters and information included in this research study.

Chapter 1 – Introduction. The chapter will include the background of the study and the qualitative research methods used.

Chapter 2 – Literature Review. The chapter provides a biblical theology of leadership and succession planning, drawing upon Old Testament and New Testament examples.

Chapter 3 –Methodology. The chapter will focus on the qualitative research methodology and the survey tools utilized.

Chapter 4 – Data Analysis. The chapter will focus on analyzing data collected based on surveys and interviews.

Chapter 5 – Conclusion. The chapter will focus on the researcher's thoughts on the importance of leadership succession planning and transition. The importance of such a strategy to the health of the congregations will be outlined. It will stress the importance of the visionary views of the leadership in ensuring that the church remains healthy and true to its mission.

Implementation of the Intervention Design

Research Questions

The research questions developed for the online survey provided the basis for the researcher to substantiate the importance of ministries having a succession plan in place. Each question solicited from the participant their experiences in situations where there were or were no succession planning strategies and the impact it may have had on their leadership style and transition. For participants who may not have such a plan, the intention is for the questions to open the dialogue as to the importance of communicating with their leadership teams the importance of providing a roadmap for the future of the ministry. In addition, participants were requested to provide background information-centric on their length of time in pastoral leadership positions.

Each participant was requested to provide personal information such as their name and time in their current position within the ministry. This will provide the foundfor as to each participant's leadership experience. In addition, the researcher felt that the time in ministry would provide multiple perspectives and experiences from participants in the succession process.

Church Governance/Leadership: *Type of church governance structure.*

The purpose of this question was to understand how churches select successors. Church governance and structure, in many instances, establish how leaders are identified. In some organizations, such as the African Methodist Episcopal, the successor is appointed by the organization. In others, there is a search process for the next leader. In any case, the procedure of appointing the most qualified person to the pastoral role must be addressed. As in the case of Zion earlier, that responsibility fell to the Virginia State Council, which was the governing organization and a part of the Pentecostal Assemblies of the World (PAW), to identify the next leader.

- *Is there a current process in place for new leadership (i.e., pastors)? For example, if governing organization appoints a new pastor, please provide that information.*

The purpose of this question sought to glean from the leader whether or no thought had been given to the process of succession. What processes or policies, if any, are in place to handle the transition of leadership in the current church? This ascertains the processes the church has in place to acquire new leaders.

- *Does the church have a leadership training strategy in place for upcoming ministers and leaders?*

The purpose of this question was to ascertain whether the existing leadership had prepared for the succession process and trained or mentored potential persons to fill that role. Such a training strategy could identify potential successors within the congregation and empower

others to work within the ministry, training them in desired leadership roles. This ascertains whether the leadership has given forethought to the necessary qualifications and training those potential leaders would need.

- *If the Pastoral position is vacated, has a succession plan or strategy been developed? If so, can the researcher have a copy of the succession plan?*

A copy of the formal succession plan was requested if available. It contains the experience from respondents that the plan of succession is outlined in the church by-laws or constitution. In some cases, no specific successor was named, while in others, a specific person was identified, only the title of the assistant or an associate pastor. All identifying information would be removed from the succession plan. The purpose of this information assisted in the development of a succession plan template or strategy for use with other churches. Files shared with the researcher will be disposed of, and no propriety information will be used.

- *If the Pastoral position is vacated, has a succession plan or strategy been developed to ensure a smooth leadership transition?*

The purpose of this question was to ascertain respondents' experiences in the succession planning process. In addition, the purpose of the question was to determine if the pastor and the church leadership team had discussed the process of succession in the event the position becomes vacant.

- *Have you participated in a succession/transition process? Would you provide your thoughts/advice on the process? What if anything could have been done to make it a smooth transition?*

The purpose of this question was to determine respondents' participation in the process of transition and/or succession. Those who had experienced the process of transition or succession could provide invaluable feedback on how organizations could make the process smoother for

both the leadership and the congregation. Lessons learned or other pertinent experiences would greatly benefit the thesis project.

Additional Survey Questions:

- *Please provide any additional comments which may assist the researcher.*
- *Will you be available to schedule a follow-up telephone/video conference with the researcher to discuss your answers? Additional information will be invaluable for her to substantiate the data analysis in support of this project. Please provide contact information.*
- *Would you be willing to provide additional pastors/ministry leaders who could provide valuable information relevant to pastoral succession and transition? If so, please provide their contact information, and a participant email will be forwarded.*

Additional questions were sought to gain additional contact information from other pastors and ministry leaders who could provide their experiences in leadership succession and transition.

Chapter 4

Data Analysis

This chapter analyzes the data collected based on an online survey and telephonic responses. The researcher felt that including survey results from other survey tools would provide a baseline of where the community stood in succession readiness across various platforms such as profit, nonprofit, etc. This project aims to collaborate with pastoral leaders and their teams on how they are prepared to handle the vacancy of the pastoral position within their respective congregations. In addition, the project examined the implication of how succession planning has helped churches during times of transition by identifying who will succeed pastors. As a result, strategy, approaches, and practices are introduced, which may be utilized to develop a viable succession plan.

Initial questions were centric on understanding each respondent's time in the ministry, whether as a minister or a pastor. While numerous emails and Facebook requests were sent out, few respondents did take advantage of the online survey or responded to email requests for interviews.

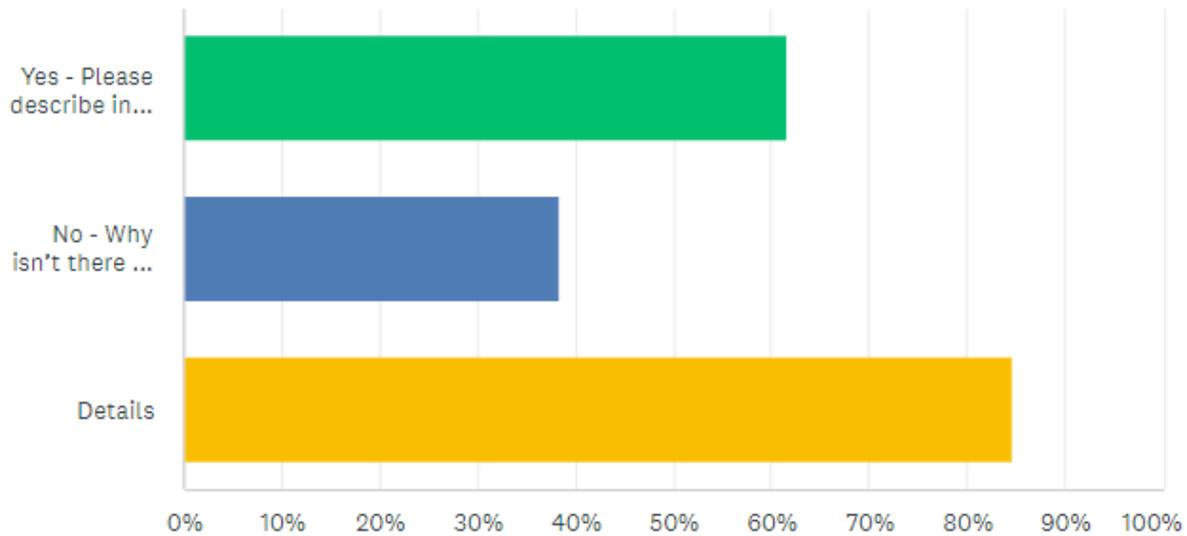
Many leaders had been in the ministry for at least twenty years among the respondents. Among the respondents, at least three had participated in a pastoral transition process. One succeeded his father as a pastor, while another, the founder of the church, transferred it to an elder within the congregation. All provided fruitful responses regarding the importance of succession planning and provided reasons why many pastors shy away from the topic.

The majority of the respondents have ministries located in Virginia. Denominations represented included PAW, AME, and non-denominational or independent organizations.

Church Governance or Church Structure

Among the respondents, most responses indicated their church structure is comprised of the Board of Trustees or the Elders Board.

Leadership training strategy



The above bar chart depicts the percentage of respondents with a leadership training strategy. Sixty-two percent of the respondents have a leadership training strategy, while thirty-eight percent do not.

Succession Plan Experience

Most of the respondents skipped this question regarding pastoral transition experience in succession. Only two respondents answered this question. One response was 'yes,' while the other responded 'no.' However, one responded that during part of the AME conference, a pastor was assigned to the local church in the event the previous pastor left. Many other respondents, whom the researcher spoke to provided succulent feedback regarding their succession and pastoral transition experiences. One respondent noted that many respondents may not have

answered this question because "they don't have a succession plan, or they don't want to discuss the topic."

Researcher's Role in the Project

The researcher in this project is not an expert or professional in the field of qualitative analysis and had limited knowledge of completing a qualitative research interview. Therefore, the researcher relies on the narratives from other pastors regarding their pastoral succession and leadership transition experiences. Although the researcher is not a pastor, she has ministered in various capacities in several churches she obtained membership. She has witnessed the complexities of pastoral leadership at various churches and has a passion for understanding those issues centric on pastoral leadership, especially in the church. She has witnessed many leaders at various levels as they pushed through sickness, death, and its impact on the local church, leadership teams, and pastors. She has developed a passion for whether leaders have a plan to deal with the likelihood of transition within the church.

Survey Responses

The following section summarizes respondents' answers to survey and interview questions. As the surveys were anonymous, all pertinent personal and church information has been removed. In addition, each participant has been assigned a unique identifier to preserve their confidentiality and the church. Responses were obtained through the online survey or telephonically. Responses received telephonically were recorded and transcribed. The input was inserted into the survey to determine data statistics.

The researcher desired to obtain a considerable number of responses to this project. She reached out to potential respondents by identifying them from the Pentecostal Assemblies of the World (PAW) and the Virginia State Council (VSC) websites. Potential respondents where she

did have email addresses were contacted via email with an introduction and survey link. Additional potential respondents were contacted through various social media platforms and groups. In total at least 50 potential respondents were contacted as a means to generate interest in this topic. Unfortunately, roughly twenty percent responded. The researcher found that those who did respond did not provide follow-up contacts to whom she could reach out. The response narratives which follow have been obtained from the online survey questions and follow-up questions that generated interest during our conversations.

Respondent ID: *R01*

The participant is the founder of the church. He has currently been pastoring for twenty-one years. The respondent is a part of the PAW and describes his church governance in compliance with the church by-laws. Respondent has named his Assistant Pastor as his successor. Once the Pastor determined his successor, he announced to the Trustee Board at a meeting outlining his succession steps before his retirement.

He describes the leadership training strategy as delivering a Sunday morning message every 5th Sunday and conferring with the named successor on major decisions regarding the church affairs. He further delegates areas to the Assistant Pastor, who makes the final decision and is responsible for implementation upon conferring with the Pastor.

Respondent *R05*

Participant has been pastoring for twenty-eight years and currently serves in the African Methodist Episcopal (AME) organization. She describes the church governance structure as episcopal. In areas of church succession within the AME organization, the pastorate is assigned by the bishop of the organization. Pastoral assignments made by the bishop are based on recommendations from the Presiding Elders of the District the church is located.

Regarding leadership training strategy, the organization sponsors an annual leadership training institute that all ministers or pastors must attend. As a result, many pastors have obtained a Master of Divinity or higher degree and have completed leadership or biblical studies sponsored through the conference before being assigned a church to pastor.

Respondent *R06*

Participant has been pastoring for twenty-nine years and serves in the AME organization. She describes the church governance structure as episcopal. Regarding succession or pastoral transitions, the bishop fills vacancies with recommendations from the District Presiding Elders. All operations are based on the AME Zion Book of Discipline, which is updated every four years at the General Conference.

Ministers preparing for ordinations are required to enroll in conference studies classes which are taught by seasoned AME Zion pastors who possess a Master of Divinity or Doctor of Divinity degree. Those who have obtained an MDiv must take AME Zion History and Polity classes. All pastors and ministers must attend the organization's annual Leadership/Training Institute, annual spiritual emphasis classes, and other pieces of training are required by the Bishop.

Respondent *R07*

The participant has been pastoring for twenty-five years and is the founder of the church they currently serve. However, the respondent did not identify their church governance structure or any information regarding leadership training strategy or their experiences in succession planning.

Respondent *R08*

The participant has been pastoring in the current position for three and a half years. He previously pastored a church located in the Maryland area. The church governance structure is classified as ecclesiastical; however, there is no documented training strategy currently in place, and it was scheduled for completion in April 2021. Regarding succession plan development, the respondent responded, “There has never been a tradition of succession planning; however, this is changing.” Additionally, this respondent commented, “The Apostolic Pentecostal tradition has not, in my opinion, given much thought to what happens when a new Pastor is to be selected as the majority of our fathers died in office.” Follow-up communication was initiated with this respondent as they participated in a succession transition.

Follow up Questions:

From your previous pastoral transition...How was the process handled?

In your opinion, how was its impact on the congregation?

Answer:

As for my previous transition, I am not sure it went as well as it could have gone, and I take full responsibility for that. Given the opportunity to do it again, I would have done things differently.

“Whenever a pastor leaves a church, it will greatly impact the congregation, especially as in my case, I was the founder and only Pastor. My wife and I planted the church, and there was a certain DNA that went with the vision of the church. It is almost impossible for an incoming Pastor to drive that vision if it is not theirs. They must move forward with their vision, which immediately changes the direction and focus of the ministry. So, in any succession process, you will hear regularly, “it’s just not the same” it can’t have the same flavor if the ingredients have changed (does that make sense?)”

The impact for some was challenging, while some moved seamlessly. I have observed that those persons that were at the church the longest have been impacted the most. However, this is a subjective view as I have only spoken with a few.

Respondent *R09*

The participant did not indicate the number of years as a pastor. He did indicate the church governance structure as Board of Trustees, Deacon Board, and Pastor. The respondent had already identified their successor, who is currently in training. However, he has not identified when the successor will take over as pastor. There is no specific time when the current pastor plans to retire. Regarding leadership training for potential leaders, he outlined the following strategy:

“Every minister must take and pass the Primary Minister Course. After two years of completing the course, and upon approval from the Pastor, the minister may take the ordination course. Upon completion, the minister has to be interviewed by the State Bishop and the State Council of Churches credential committee. Upon successful completion, the minister is then ordained. The Pastor then has the option of naming their successor or allowing the church to select who succeeds them.”

The respondent indicated their succession plan was located in the Minutes of the Annual Business Meeting. They named their successor when they were elevated to the position of a bishop, and their Assistant Pastor would be named Pastor.

Respondent *R14*

The respondent indicated serving in ministry for over seven years and only two months in her current position as pastor. The church is a part of the PAW organization, and the church governance structure is indicated as the Board of Directors. The respondent indicated that the succession plan is currently under construction. The leadership training strategy includes potential leaders taking monthly classes in

preparation for a leadership position. Each class is scheduled for six to eight weeks. The respondent has experience in the transition process as she succeeded her father, who became ill. She had served as his Executive Pastor prior, and when he became ill, she served as pastor for at least three years. She indicated the succession process was quite smooth; however, it could have been better with more defined processes.

When I interviewed the respondent regarding the previous pastor's succession plan, she indicated that her father named her in the church's bylaws by name. There was no defined succession plan at the time.

Respondent *R15*

The respondent indicated they had served in ministry for thirty-nine years, and the church they serve is non-denominational. The church governance is pastor and elders, and she is not sure of the process of documenting pastoral transition. The respondent was not able to provide any information regarding their experience in succession or pastoral transition.

Respondent *T01*

The respondent has been pastoring for over thirty-four years. He succeeded his father and passed the baton on to his son at the beginning of 2022. The church structure is Elders, Board of Deacons, and Trustees. His leadership strategy is to mentor and guide upcoming leaders in advising them to take seminary courses and courses offered by the organization. Fruitful conversation from the church pastor's position and leadership of an organization is crucial. However, the respondents felt that many pastors do not broker the succession conversation due to not having a retirement plan or financial plan to replace the income loss should the pastor resign or retire.

Supplemental Questions:

- What are your thoughts on how pastors successfully pass the baton of leadership? Your thoughts. I feel that potential successors should be at best the age of 50-60. Depending on the size of the church and the bylaws and constitution, the previous pastors have put in place to ensure the process is proper and that people are doing what they need to do.
- As the respondent is the Presiding Bishop of a major organization, the following question was posed: How would you broker the conversation of succession planning with Bishops and Pastoral Leaders under your purview? “We do have such conversations encouraging pastors to step aside and utilize the younger generations who are coming behind you.” As he is in the process, he is transitioning the pastoral role over to his son. He responds that those generations are empowered to preach better, and pastor better than he does.
- Baptist/Methodist churches are board-run churches, and the pastor is there only to preach. In holiness churches, the opposite exists; the pastor becomes the board's chairman and runs it. It is more of an individual-centric process. The concern is that many do not have a retirement plan in place for when they retire. They do not have any other means of livelihood.

Respondent – T02

Respondent has been a Senior Pastor for over eighteen years. The church in which he serves as the pastor has two locations in the Detroit Michigan and Baltimore Maryland areas. He classified the church governance structure as Board of Trustees and the church as an independent denomination. Being the pastor of two churches they are considered a ‘fellowship’ and “being part of a fellowship; we reserve (in bylaws) the right for sovereignty and autonomy. as it relates to fellowshipping. As pastors of the fellowship, we have our autonomy over our respective churches.” The subject of succession and transition is addressed in the church bylaws.

The respondent clarified that during the time that he was ill, his wife, who is the ‘Vice President of the Corporation,’ an ordained Minister, and Assistant Pastor of the church succeeded him. The church bylaws stipulate that the “Vice President of the Corporation position succeeds the Pastor.” It just happened that the respondent’s wife occupied the position at that time.

Respondent provided the following thoughts on the topic of succession:

“I think that the Bible gives a very good illustration of leadership succession. “When Moses was transitioned out of his leadership position, the person that was chosen was his minister (Joshua). And that alleviates nepotism and everything else. The person who has been serving the leader all along is now the successor. In the instance of Elijah and Elisha; Elijah’s helper (i.e. the person who had been there assisting) succeeded him. This helps in a smooth transition with the congregation.”

Supplemental Questions

Thoughts on nepotism? “I have no problems within succession with family members if they are already in place and working and serving in the ministry. I think it is a slap in the face to leaders to bring in my son who does not show interest in the ministry and it is only to preserve the dynasty and legacy of the family.” The legacy will continue whether or not he comes into play or not. But to bring someone in who does not serve or love the people, we do an injustice to this wonderful institution of the church.

Thoughts on pastors who ‘stay too long as a pastor? “I believe we as pastors and leaders should be actively looking and diligently imparting into others the vision, dreams, goals of ministry, I believe that they will get it as they walk with us.”

How do you broker the conversation with pastors regarding succession? How do you change the paradigm of staying in the office of a pastor past one’s time? Part of it is there is no provision to take care of the family. “Many pastors haven’t made provisions to take care of their families once they leave the pulpit. Another is the pastor’s ego. Some pastors are not willing to nurture someone else who could potentially be ‘greater than they are. Some pastors want to keep

their members below them and inadequate, in their minds to succeed and to take people over this Jordan.”

Respondent – T03

Respondent has been a Senior Pastor for over twenty-two years. He classified the church governance structure as congregational, emphasizing pastoral authority and leadership. There is a Board of Directors in place, they are organized primarily for legal purposes and meet at least twice a year. The church denomination is Baptist, and currently, there is no succession plan in place.

In the event of a pastoral vacancy, the Board of Deacons bears the responsibility to form a Pastoral Search Committee to ensure an Interim pastor or speakers are in place until the Pastoral vacancy has been filled. Interested persons submitted applications for the pastor position, and the church congregation votes on the intended candidate. There is no formalized leadership training strategy at this time, but the pastor currently is mentoring a ‘student pastor’ in the ministry. The respondent has not participated in succession.

In his current position, the respondent who applied for the vacancy of the pastor was selected, interviewed, and voted on by the church congregation. The researcher queried him about his thoughts on having a pastor selected from within the current leadership team. He offered pros and cons, referring to his current ‘student pastor’ who would be a good choice for pastors. The congregants are familiar with him, he is familiar with the church culture, and he is ‘taking good pastoral care of the church teenagers and their parents.’ While they love him, he hasn’t had to make the difficult decisions a senior

pastor would be expected to. The lack of experience would play a key part in successfully leading the congregation in this instance.

Respondent *T04*

The respondent has been a pastor for the past five years. The church is part of the PAW organizations. The church is incorporated and has a board of directors where the pastor serves as the Chairman and the Chief Executive Officer (CEO). There is also an Advisory Board which consists of church deacons who are responsible for the facility management of the church.

The church's constitution bylaws are specific in addressing the topic of succession. Drafted up quite some time ago which stipulates what happens in the event there is a pastoral vacancy. The church has to vote for one of the assistant pastors. "In the event of passing or vacancy if the pastor, the church works in conjunction with the Business Administrator in handling the church affairs and the ecclesiastical affairs of the church until a new pastor is selected." The Business Administrator serves as the Vice Chairman of the Board of Directors. His role is to call a business meeting of the congregants and candidates, who are selected from among the Assistant Pastors to be the Interim Pastor until a Selection Committee has been formed to select the new pastor. The board votes and then the vote is before the congregation. The selectee has to receive 66 percent of the vote for it to be valid. Note that as the church is incorporated, in that state the organization, PAW cannot "come in and dictate how the church selected their next pastor."

Once selected, the board of directors forms a pastoral selection committee that then advertises the vacancy,

The respondent indicated that he has participated in transition previously. He described it as 'brutal' mainly because of nepotism and politics. Speaking from his perspective the process took two years to complete as the former pastor's children felt their brother should have been the pastor. They felt they were 'entitled to have their brother follow in their father's footsteps instead of someone else.

We spoke about the human emotions felt during the process of succession and transition, especially when the children of the leader are experiencing grief in the death of their loved ones. While they are grieving their loss, they also have to bear witness to someone else in that parent's place. It is important to remember not to negate the human factor when dealing with succession as one still had to be sensitive to the feelings of the pastors' children.

The church does have a detailed training strategy in place which consists of a Bible Institute which had been in existence for 30 years. The church partners with a local Christian college for accreditation standards. This allows leaders to take courses at the church that can be transferred towards a degree program.

Supplemental Questions

Regarding your succession and transition experience, your thoughts on how the process could have been smoother? Respondent answered "nothing. The previous pastor established him as the Assistant Pastor before his passing. He had confirmed that this was the next leader of the body without actually saying it. However, his intentions were noted by the board and congregation when the time came for the final vote. The pastor had bited his confidence by stating "I am Pharoah, when you see him, you see Joseph." You cannot minimize the human emotions of pastors' children.

While the predecessor had children, they felt the oldest should have been the pastor. However, the son who was subjected to going through the same process as other potential successors were rejected as pastor. While the entire process was painful, the pastor felt it “prepared me for the role of pastor. He felt it was a growth experience for him as a leader. “The process solidified me as a pastor in front of the congregation.”

Thoughts on Nepotism:

Nepotism “has become the order of the day in our churches especially in out. Many run the church like it is a family business. It does a disservice, as many are not called. It does more damage than good but the church as a whole suffers.”

Chapter 5

Conclusion

The purpose of this study was to survey pastors and ministry leaders to ascertain their thoughts and experiences regarding the preparation of succession planning within their respective congregations. Through research, surveys, and interviews with church leaders sought to understand how pastors today are handling the topic of succession planning, amongst themselves, with their church leaders, and the impact on the congregation and ministries. It sought to address the importance of pastors and ministry leaders having thorough and honest conversations on leadership succession and pastoral transitions. To initiate this conversation means that leaders are looking to the future of the organizations, their leadership teams, and the congregation as a whole. This chapter will highlight the many facets of succession planning to focus on processes and practices which would be beneficial to assist leaders in their quest for succession planning.

The researcher learned the importance and value of succession planning not just to the body but to the community in which it serves. A successful transition is essential to the health of the church. When in disarray, many would tend to leave ministries where there is confusion and disorder. A healthy transition shows that the leaders possessed the fortitude to look to the future concerning the administration and continuity of the institution.

The researcher also gleaned reasons why many pastors don't discuss their transition of succession planning to her dismay. Each pastor bears a responsibility to prepare future leaders, pastors, etc. on the nuances of ministry, leadership, and pastoring. However, many do not mainly because the topic was not shared with them early on in the years of pastoring, leading, or

ministering. Also, many pastors can't seem to set aside their egos to assist those who would not only lead but who may venture out to start their ministries.

Many leaders may not feel that succession planning is biblical, with which the researcher disagrees. Scripture show numerous examples such as Elijah and Elisha, Moses and Joshua, Paul and Timothy, Jesus, and the Disciples. We have numerous examples where these leaders possessed the forethought to peer into the future and recognize when their times as leaders were drawing to a close. They not only recognized those who labored alongside them, but they also took the time to mentor and empower them in ministry.

The researcher was concerned with developing strategies that would help make pastors feel at ease with brokering the topic of succession planning and transitional leadership. First, succession planning looks to the future of the organization or ministry. Many pastors tend to focus on the here and now. What will happen when they are no longer in the role of the pastor? Leaders are encouraged to empower the future generations in being effective in the leadership and administration of our local assemblies. There is a paradigm that needs to be addressed to be successful. That is leaders who prepare for their future, when they may no longer be in the role of the pastor should have retirement plan Searching out financial management advice is paramount as many prepare for their future. While many do believe and understand that God will provide, each should endeavor to be good stewards of that which He has entrusted us with. That includes our future. As an employee, it is essential to have income that will aid many to live in the means they have grown accustomed to for their families.

The strategies included will be of no benefit if at least pastoral leaders do not broker the conversation the Body of Christ so desperately needs.

It would be remiss for current leaders to assume their leadership is permanent.

Vanderbloemen and Bird make the following observation: “Pastoral leadership is temporary.” At some point, something or someone will succeed our leaders. To prepare for these times of transition, current leaders conduct succession planning for their organizations. To leave this important step unchecked in one’s leadership is irresponsible. To plan for the future of our church, each leader needs to step back to identify the possibility of their having to leave the pulpit for one reason or another.

The topic of succession planning is both delicate and complex. It is delicate in the sense that many leaders may not handle it very well, and it is important when discussing the topic, one is sensitive to the emotions that the topic evokes. However, it forces many leaders to deal with their fears and perceptions so that the church can move on. In addition, succession planning raises legacy, mortality, and self-worth questions for many pastors. It is a subject that is necessary to have with the leadership team. To be effective and successful, the pastor must take a step back and have this conversation not only for the sake of the ministry but for themselves.

For the researcher, there is a paradigm that must be addressed. Many pastors have the mindset that God will provide. There is no doubting this; however, God does expect each of us to be good stewards of that which he has entrusted to us. As pastors and leaders, it is important to look out for the financial well-being of our families. There has to be a discussion regarding financial planning or retirement planning. This is a discussion many do not have. As a result, their families are left with financial responsibilities if the major breadwinner is absent. The researcher feels this is one of the reasons many pastors do not discuss succession planning. The stipend from the church is their only source of income, and when that is cut off, they are left financially vulnerable.

As we focus on Moses and Joshua's succession process, we can take a page from Moses' leadership guide. First, Moses understood the impact that identifying his successor would have on the children of Israel reaching the Promised Land. Moses recognized his mortality and initiated the succession plan. He understood Israel's success depended on who would lead them. Secondly, he sought guidance from God. He sought God for guidance and wisdom, recognizing that he did not have all the answers. Succession cannot be done in a bubble. Leaving God out of the process would be a mistake for the church, its leadership, and its congregation. Lastly, once his successor was identified, Moses made his decision clear to the children of Israel.

Succession planning is vitally important and essential for our church's continuity and leadership development. Leaders need to recognize the need to have a succession planning process or program in place to identify strategies during times of transition. It is just as important to have a leadership training plan to assist those upcoming leaders in equipping them for the upcoming leadership roles as pastors cannot do the work of ministry alone. Therefore, it is important to train the next generation with the leadership skills necessary to effectively lead the flock. Pastoring is much more than preaching and teaching. There is so much to be done, and to ensure the church is safe; its foundation must be secure. Therefore, effective leaders can make the life of a pastor much easier as they take on the responsibilities of dealing with spiritual maturity, feeding, and taking care of the flock.

Successfully handing off the leadership baton to a successor is essential if we want our organizations to thrive in the future.⁸³ Meticulous planning and the right timing ensure a smooth and seamless handoff. Leaders are encouraged to take the time in their planning process, thereby

⁸³ Mullins, Tom, *Passing the Leadership Baton* (Thomas Nelson Nashville 2015), 7.

making succession as much a priority as vision casting, setting goals and objectives, etc. To ensure the viability and continuity of the organization, its leadership team, and overall mission, each leader, bears the responsibility to ensure that the leadership baton is passed on in a smooth transition.

The subject of leadership succession is paramount in its importance to the continuity of the organization and as a legacy of past leaders. Succession is that process by which the leader prepares the organization for when they are no longer in control. Succession is that process by which other leaders who can lead the organization are trained and prepared to transition. There are great consequences to those leaders who do not prepare the organization when they are not at the helm. These consequences could range from loss of revenue and intellectual property to the ultimate consequence of when that organization is no longer operational.

The absence of a succession plan places the organization in a weak position, lacking strong leadership direction, making them vulnerable to an environment that is more demanding than ever.⁸⁴

There are no ‘one size fits all’ strategies on how to handle leadership transition in churches. Factors such as church culture, leadership style, and the size of the church all play a part in how leaders and their boards can handle this situation. Leaders need to have developed a process for how the church, its board, leadership team, and congregation will handle the change.

It has been suggested that there might be a process by which every six months or so, one-third of the churches’ leaders should be up for transition, and this should include the staff of the church. By establishing in writing that at regular intervals,

⁸⁴ Hollinger, 163.

key staff and lay leaders shall step down from their positions, including elders, deacons, trustees, and board of directors.⁸⁵

As stated previously, this process may not work for all assemblies. Factors in place will determine what and when leadership transition should take place and viable reasons for the change have to be considered. Having a process where leaders rotate or transition can allow others to serve in leadership capacities, garner confidence in their abilities to lead, and provide a space of empowerment for the pastoral staff. Many leaders in our churches have occupied their position for many years, much serving faithfully. But what about those who have joined with an anointing to lead, preach, and serve the congregation? This can also be beneficial to the members as they become familiar and comfortable with others leaders who can serve them without only relying on the Pastor or a specific leader. This reduces burnout, which many leaders may experience.

Approaches to Succession Planning

With the various studies, many approaches and strategies have been developed which will assist our churches in developing a viable succession plan. However, there is no one-size-fits-all to succession planning. It can be a long and tedious process. Figure 1 outlines the approaches to succession planning as documented by the Deloitte Insight Group. These approaches reflect their belief that an effective succession planning approach must be sensitive to participants' motivations, experiences, and emotions.⁸⁶ To better understand the approaches, we have summarized each and the impact each has experienced on their respective organizations.

⁸⁵ Watkins, 95.

⁸⁶ Rosenthal et al.

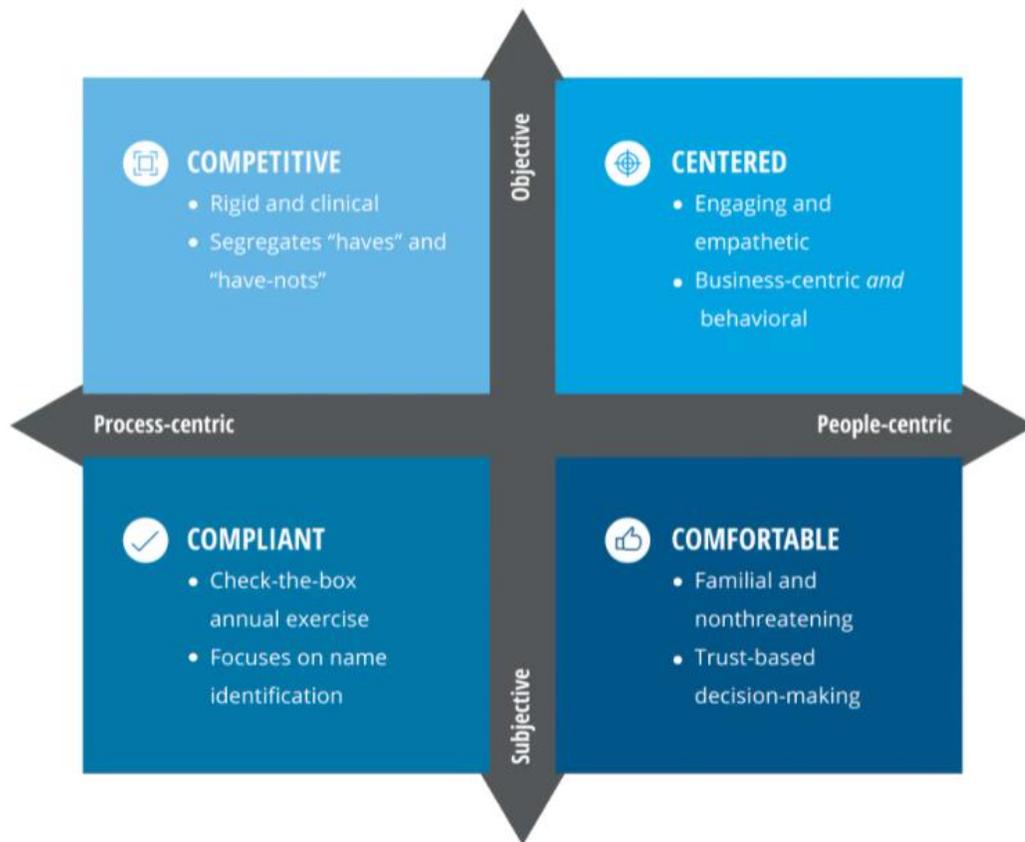


Figure1 – Approaches to Succession Planning

The competitive succession planning approach is described as a rigid rigorous process that ignores the people aspect. This approach is characteristic of organizations that take succession planning seriously and build substantial processes to evaluate and advance chosen successors. It identifies a select group of high potential future leaders and puts them through a rigorous assessment and development program for future roles. One major drawback to this approach is that it ignores human actions that can arise when a process fails to consider the ‘people factor.

The centered succession approach is a balanced approach that blends objectivity and empathy. This approach is designed to put the people involved (both the leaders managing the process and the successors) who are considered at the center, supported by

processes that help decision-makers maintain objectivity. This approach focuses on creating an environment that channels emotions productively into the succession planning process. It utilizes people-centered design tools that allow organizations to consider objective talent assessment criteria without perceiving the process as threatening to the leadership community. This approach aims to create a program that leaders want to participate in.

The compliant succession planning approach is described as a ‘check the box’ exercise that collects names and files them away. Processes are standardized and ridden with objective data to structure succession planning decisions. However, other priorities tend to push this process into the background forcing the final succession decision to fall within the Human Resource (HR) purview. As a result, successors are determined by HR personnel without any input on the capabilities of new leadership.

The comfortable succession planning approach is described as informal, people-centric, but subjective. Organizations utilizing this approach leave succession decisions to a small group of leaders. Successors are selected based less on objective data than on reputation and tenure. This approach is focused on founder-based, private companies that conduct business in the ‘old family business style.’ This approach can, in time, lead to complacency and stagnation as it is fraught with bias and can often overlook hidden gems within the organization.⁸⁷

Effective Succession Planning

The researcher has collected various strategies that can assist stakeholders such as pastors, and ministry leaders in developing a succession plan and transition process. While many

⁸⁷ Ibid.

strategies are based in the secular community, their processes can greatly benefit those in the church. Paradigms must be changed for current pastors to better prepare for those instances when they may leave the pulpit. Conversations regarding financial management and establishing retirement funds could better prepare for such occasions without the pastor not having to worry about how to provide for their families.

For succession planning to fulfill its purpose, a formal process needs to be executed to assess church employees and their readiness for advancement within the church structure. A succession plan defines competencies, assesses the necessary mix of knowledge and skill for leadership, and recommends training to master such competencies.

Tips for creating an Effective Succession Plan

- Make it a Priority. Commit the required time and resources. Focus on identifying which positions warrant a succession plan. Identify those leaders who may be good candidates for higher levels of responsibilities. Discussing succession planning means evaluating all leadership roles within the specific ministries. For example, the Executive Pastor of Ministry leader roles should also be evaluated if their respective person transitions out of those roles.
- Devote Time to Succession Planning. Succession planning is a process that requires addressing periodically. Therefore, documents generated due to succession planning should be reviewed periodically.
- Create a Development Process. Create a defined and specific talent management process that identifies skills and aptitudes needed to meet the predetermined competencies. Leaders should have conversations to identify potential talent and discuss strengths, weaknesses, skills, experience, and developmental needs of the available leadership (or potential leadership) pool.
- Provide a Mentor. Leadership development is a process resulting from opportunities to practice key leadership competencies. Provide identified leaders with leadership opportunities and a mentor to help them build on their strengths and identify areas to improve.
- Develop a Structured Transition Plan

Organizations fail when they are unprepared for leadership transitions, they don't have a process to assess internal talent and lack vital communication about the organization's plan for leadership transition. Strong succession planning begins with the organization's strategic objectives and purpose, an evaluation of current capabilities against these goals, and identifying gaps in skills or backgrounds. To build a competitive advantage, organizations should complete such evaluations regularly and examine the composition, individual performance, and full board effectiveness.⁸⁸

Malone makes the following observation regarding pastoral succession: "Remember that the Body of Christ is a living organism and as such, it needs to grow and expand. As leaders, we must seek to train ourselves "out of a job," meaning we need to train our replacements to do our jobs better so that God can release us to move to our next job assignment."⁸⁹

"One of the toughest things any leaders can do is hand off the baton of leadership to another leader of the organization. It takes planning and forethought; outgoing leaders must keep their egos in check while letting go of one of the things they love most."⁹⁰

Mullins identifies tasks leaders should take in preparation for their successors:

- Leaders should make certain that the organization's core commitments and convictions are shared by those who will hire the new leader
- Leaders bear the responsibility of building the leadership of outstanding individuals who share their convictions and vision.
- Leaders must communicate these convictions to the various constituencies, laying a solid foundation for a healthy succession.

⁸⁸Gwin and Sanders.

⁸⁹ Malone, 24.

⁹⁰Mullins, Tom, *Passing the Leadership Baton: A Winning Transition Plan for Your Ministry*, (Nashville, Thomas Nelson, 2015), xiv.

- A leader should drive the convictions and beliefs into the culture and ethos of the organization.⁹¹

Within nonprofit organizations, many leaders find themselves in positions where they are unprepared to fulfill the mission and vision because their predecessor did not properly prepare the organization. In leadership succession, one of the strategies is that of change management. Change management is the process that manages the expectations of persons left behind. When executed, it successfully manages the expectations of leaders who are new to the organization, new to the culture, and new in their roles and responsibilities. Each pastor is an interim leader. Each leader needs to understand their role in leading the church; while they may be there for the long haul, it is their responsibility to obtain the pertinent training while empowering potential successors and other leaders.

Strategies should be documented to assist the organization and the leadership team in dealing with the issues of leadership succession and transition. It impacts the congregation versus when that church leader has the vision to identify their successor and how it provides a smoother transition for the church leadership. Undoubtedly, the leadership team must adapt to a new leadership style and standards, which means one must manage change within the church. However, the congregation and the leadership team leaders better understand and accept a new leadership when a plan has been implemented effectively.

The succession planning process could be implemented in phases where that new leader is getting used to preaching and teaching congregants. The congregants are getting used to him standing before them, giving them direction. The successor displays confidence in the new leader when this type of transition is implemented before the time of change. He allows them to be over

⁹¹ Mullins, Tom 210.

ministries and other ministers within the congregation. As the responsibilities are increased, others will become comfortable and confident in new leadership.

A healthy pastoral transition enables a church to move forward into the next phase of its external and internal development with a new leader appropriate to those developmental tasks and with a minimum of spiritual, programmatic, material, and people losses during the transition.⁹²

The topic of succession planning is of great importance to organizations looking to the future. Literature is very explicit in outlining how leaders should effectively prepare successors for additional responsibilities in preparation for the role of successor or the next leader. If leaders do not develop successors, the organization may lack enough leaders to grow the business successfully. On the other hand, in many cases, those would-be successors may leave the organization for career advancement as leaders may not care about their development. It is the responsibility and job of the leader to help develop the next generation of leaders. Through effective succession planning, an organization identifies and develops the strategy to reduce or eliminate existing or anticipated gaps in human capital and knowledge drain.⁹³

An effective succession plan will focus on existing organizational processes such as leadership performances and knowledge gaps. It should include training and development, performance, and management through the incumbent organization and the successor.⁹⁴

This project sought to identify the importance of leadership succession planning for the church community. Pastoral leaders must discuss the topic and understand its importance for the

⁹² Carolyn Weese and J. Russell Crabtree, 41.

⁹³ VanVactor, 192.

⁹⁴ Ibid.

continuity of our churches. We as leaders bear the responsibility to exercise great stewardship over that which God has entrusted to us. The researcher feels that we in the body of Christ bear the responsibility to better prepare younger leaders to take over the reins. They need our wisdom, experience, and encouragement in meeting the complexities of pastoral leadership. It is time to put egos aside and look to the furtherance of the Gospel as mandated by the Great Commission: To make disciples.

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APPENDIX A
SURVEY RESPONSES

Respondent ID	Title	# In Position	Q5	Church Governance Q6	Q7	Q8
R01	Pastor	21	PAW	In Compliance with By-Laws	Assistant Pastor will be the new pastor	Y - Details: Upon my promotion to the Diocesan Bishop of Zimbabwe, Africa, I have had my Assistant Pastor in training succeed me by doing the following: 1. He delivers the Sunday morning message every 5th Sunday with me in attendance. 2. I confer with him on all major decisions. 3. I delegate some areas where he makes the decision, then we confer, and then he implements the program or project.
R05	Pastor	28	Methodist	Episcopacy	The assignment is given by the Episcopal Leader (Leader)	Y - Most Pastors have obtained an MDiv or higher and have been through conference studies before pastoring a church. Additionally, there are leadership/training institutes all pastors and ministers must attend.

R06	Pastor	29	Methodist	AME Episcopal	Pastors are appointed to churches by the Bishop of the Episcopal area with recommendations from the Presiding Elder	Y - Ministers preparing for ordinations must enroll in conference studies classes taught by seasoned AME Zion Pastors with MDiv or DD degrees. Those who have obtained an MDiv must take AME Zion History and Polity. In addition, all Pastors and Ministers are required to attend an annual Leadership/Training Institute, annual spiritual emphasis week, and other pieces of training as required by the bishop.
R07	Pastor	25	New Beginning Apostolic Deliverance Ctr		Appointment by Documentation of the present pastor	Skipped
R08	Pastor	3 ½	Bethel United Church of Jesus Christ	Ecclesiastical	Prayer, Recommendation, and Selection based on biblical criteria	N - There is no training strategy in place at the moment, but it is in process. Schedule for completion April 2021.
R09	Pastor			Pastor, Board of Trustees, Deacon Board	I, the Pastor, have already named my Successor. He is currently in Training	Y - My Church is a member of the Pentecostal Assemblies of the World. 1. Every minister must take and pass the Primary Minister course. 2. After two years of completing the Primary

						Minister course and approval from the Pastor, a minister may take the ordination course, 3. Upon completing the Ordination Course, the person being considered for Ordination is 1) Interviewed by the State Bishop and State Council of Churches credential Committee. 2) approval from the Pastor, the State Bishop, and the State Council of Churches credential committee, a minister is then ordained. 4. The Pastor then can name a successor or allow the church to select who succeeds Them.
R14	Pastor	7 (Recently installed)	PAW	Board of Directors	The current Pastor will state and document their choice. This candidate and their qualifications will be presented to the Board and congregation. The floor opened for any other names to be considered and then	Y - Yes, various classes monthly some classes are 6 to 8 weeks in preparation for leadership

					qualifications submitted	
R15	Minister	39	Non-Denomination	Pastor & Elders	Not Sure, the one we have now was appointed by the late Bishop/Founder of the church	Not Sure
T01	Bishop	Since 1987	PAW	Elders/Board of Deacons		N - Church had one. A pastor trained the ministers. Looking at conduct, livelihood, and lifestyle. This is his current strategy. He recommends ministers to attend seminary (Hartford Seminary) & take PAW courses. The current pastor is preparing to transition or retire from the pastoral position on the first of the new year.
T02	Bishop	18 years (2 years in Baltimore)	Independent	Board of Trustees	As stated in the Bylaws. The position of Vice President in the corporation succeeds the pastor.	Y - Leaders are encouraged to attend higher education classes at university or seminary.
T03	Pastor	22 years	Baptist	Congregational/Board of Trustees	Bylaws dictate (Deacons form an interim pastoral search team) Deacons select a	N - Current pastor is beginning to mentor the current student pastor. No formal strategy in place.

					search committee for a permanent pastor; the church votes on the new pastor.	
T04	Bishop	5 years	PAW	Board of Director	The bylaws say in the event of passing or vacancy of the pastor the church one of the assistant pastors to work in conjunction with the business administrator in handling the business and the ecclesiastical affairs of the church until a new pastor is selected. the business administrator serves as the vice-chairman of the board of directors. his job is to call a business meeting of the congregants and	Y - We have a Bible institute there has been in existence for about 30 years and currently partners with a local Christian college for accreditation standards. This allows persons to take courses at the church and they can be transferred to the college towards the Bachelor's degree. Persons go through the Bible Institute and sit in the Ministers Academy because the Ministers Academy is set up in a way where it kind of helps you define what ministry looks like 'cause everybody who's been called the ministry is not called to preach.

					<p>candidate, who is selected from among the assistant pastors to be the interim pastor to work in conjunction with the business administrator until a Selection Committee has been formed to select the new pastor.</p>	
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Survey Responses (CONT'D)

	Q9	Q10	Q11 Add'L Comments	
R01	Skipped	Skipped		
R05	Y – Most Pastors have obtained an MDiv or higher and have been through Conference studies before pastoring a church. Additionally, there are leadership/training institutes all pastors and ministers must attend	Skipped	There are Presiding Elders in each district who serves as the communicator between the Pastors and Bishops	
R06	N - Pastoral vacancies are filled by the bishop with recommendations from the Presiding Elders. All operations are based on the AME Zion Book of Discipline, updated every four years at the General Conference. Therefore, each Pastor and Conference Minister must have the most recent copy of the Discipline.	Skipped	Skipped	
R07	Skipped	Skipped	Skipped	Respondent could not complete the survey questions
R08	N - There has never been a tradition of succession planning; however, this is changing.	Skipped	In my opinion, the Apostolic Pentecostal tradition has not given a must think to what happens when a new Pastor is to be selected as the majority of our fathers died in office.	
R09	My Succession plan is in the Minutes of my Church 2010 Annual Business meeting. I named my successor. I will be promoted to Bishop in two years; at that time, I will become Senior	Skipped	Skipped	

	Pastor, and my Assistant Pastor will be promoted to Pastor.			
R14	The Succession Plan is under construction	Y - The process was quite smooth but could use better processes		
R15	No	No	Ministers of my church do not have a voice in the ministry	
T01	No	Y - Bishop transited from his father. Succeed his (2 years as acting pastor); 4-5 years as an assistant in training before pastor passing	Cannot be afraid to utilize the young people who are coming up behind you. Currently training up his son to succeed him. Currently training and mentoring other leaders (pastors, evangelizing, etc.	
T02	Y – Addressed in By-Laws	Y - Respondent felt that the succession process could have been smoother had it been addressed in the church bylaws before implementation. Outside interference would have been	Participation in succession. Enjoyed the process of helping fulfill what was the vacancy due to transition (either while the pastor was alive) brought in to vet the next pastoral candidate. Put pastors before the pastor passed so that at the time of service, it was a seamless transition from one leadership to the next and the church stayed healthy. Also had the unfortunate pleasure after the pastor passed and there was no successor apparent in the house.	

		<p>eliminated. Others had their agenda or their candidates in mind for the pastoral position. Succession is done without any knowledge of the ministry or the prior leader.</p>	<p>Had to go outside of the house to bring someone in. The process went well once the senior leaders' 'egos' were out of the way. In the process of assisting a church that is going through their fifth pastor and three thru pastors and two due to death. Even now the church is a little 'gun shy' of new leadership.</p>	
T03	N	The current Pastor's resume was pulled and voted on.	N	
T04	Y	Y		

Follow up Questions

Received via Electronic Mail

Respondent ID: R08

Date: 12/10/2020

Questions:

From the transition at New Dimensions....How was the succession process handled?

In your opinion, how was its impact on the congregation?

Answer:

As for the transition at New Dimension, I am not sure it went as well as it could have gone, and I take full responsibility for that. Given the opportunity to do it again, I would have done things differently.

Whenever a pastor leaves a church, it will have a great impact on the congregation, especially as in my case I was the first and only Pastor ALCC/New Dimensions had, my wife and I planted the church, there was a certain DNA that went with the vision of the church, it is almost impossible for an incoming Pastor to drive that vision if the vision is not theirs, they must move forward with their vision, which immediately changes the direction and focus of the ministry. So, in any succession process, you will hear regularly, "it's just not the same" it can't have the same flavor if the ingredients have changed (does that make sense?)

The impact for some was challenging, while some moved seamlessly. I have observed that those persons that were at the church the longest have been impacted the most; however, this is a subjective view as I have only spoken with a few.

+Bishop R08

APPENDIX B

SURVEY QUESTIONS

1. CONSENT QUESTION
2. Respondent Name
3. Current Title/ Time in Current Position
4. Name of Church/Location
5. Denomination/Organization
6. Church Governance/Structure
7. How will the governing body/ church structure identify a new pastor for the congregation? If the governing organization appoints the new pastor, please provide that information documenting the process.
8. Does the church have a leadership training strategy for upcoming ministers and leaders?
 - a. Please describe in detail the training strategy. Include time in training. Please include the qualifications of potential ministers/leaders.
9. If the Pastoral position is vacated, has a succession plan or strategy been developed to ensure a smooth leadership transition?
10. Have you participated in a succession/transition process? Would you provide your thoughts/advice on the process? What if anything could have been done to make it a smooth transition?
11. Please provide any additional comments which may assist the researcher.
12. Will you be available to schedule a follow up telephone/video conference with the researcher to discuss your answers? Additional information will be invaluable for her to substantiate the data analysis in support of this project. Please provide contact information.
13. Would you be willing to provide additional pastors/ministry leaders who could provide valuable information relevant to pastoral succession and transition? If so, please provide their contact information, and a participant email will be forwarded.