

ASSEMBLIES OF GOD THEOLOGICAL SEMINARY

EMBRACING INTENTIONAL LEADERSHIP SUCCESSION: A SEMINAR FOR
SENIOR LEADERS OF THE SOUTHERN NEW ENGLAND MINISTRY NETWORK

A PROJECT SUBMITTED TO THE
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ABSTRACT

The wave of Baby Boomers entering retirement is forcing organizations of every type to seriously consider the looming leadership transition before them. Churches are no exception. The question of who leads next faces thousands of church boards. For years, judicatory leaders, local church elders, or bishops have spearheaded the work of succession. In more independent systems of governance, such as the Assemblies of God (AG), recommendations are solicited from area leaders and given to local pastoral search teams who, in turn, sift through the qualifications to arrive at a candidate who is presented to the congregation. However, this project suggests an alternative. Local churches must embrace a culture of leadership development that will identify, train, and eventually appoint high capacity learners in places of significant ministry, including the office of senior pastor. This process must be “intentional and homegrown.”¹

Eight senior leaders in the Southern New England Network of the Assemblies of God participated in a three-part process consisting of presentation, coaching, and planning. They attended a six-hour coach approach seminar during which they examined a series of articles, Scriptures, and case studies on leadership succession. They were then asked to produce a personal and a corporate succession plan for their local ministries. Participants completed a survey prior to the seminar and a subsequent follow up survey. In essence, this project sought to inform and give permission for long-term pastoral leaders nearing retirement age to consider and embrace succession as a preferred system of transition.

¹ Naomi Dowdy, *Moving On and Moving Up* (Lake Mary, FL: Creation House, 2010), 28.

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The first time I swam in doctoral waters was thirty years ago in Denton, Texas, where I was studying for a Ph.D. in choral music education. The shift from one learning institution to another coincides with the dramatic change in career and course of study. Whereas my feet were planted in two worlds for the first eight years of my working life, the Lord firmly steered me away from the concert hall to the sanctuary in 1987. Indeed, my first acknowledgment rests in the mighty, eternal, patient presence of the Lord who has led me through personal and professional terrain of all types.

When I received a promotional card from AGTS in my office in Lynn, Massachusetts, in 2009, the phrase “professional coaching” caught my eye. Within months, I had the opportunity to sit down with Dr. Randy Walls, who was visiting our district for special meetings. He encouraged me to enter the program and start the journey with a unique, two-week, two-course cohort experience. Once enrolled, other friends around the table graciously received me, and together we studied a mixture of core topics and specific coaching related courses that prompted many of us to begin our own coaching practices. The cohort was expanded to fifteen people in our second set of classes and lasted almost four years. During that time, two members of the cohort became fast friends: David Stanislaus, a long-term missionary, and Ron Meador, pastor of the Bethel Church in Duncan, Oklahoma. Ron and I stayed in David and Paula Stanislaus’s home throughout those years of study. Paula became “mom” to all three fifty-something

“boys.” David and I started Clearpoint Coaching as a result of late night conversations about what might help churches and pastors develop healthy, vibrant ministries.

The first core course taught by Dr. Melody Palm was a deeply felt journey of self-discovery for which I will always be grateful. The Theology of Work course taught by Dr. Deborah Gill was also life changing, guiding me to my current work as a coach for CEOs who are doing the work of the gospel every day in the marketplace. Jane Creswell, Nancy Branton, and Linda Miller rounded out my understanding of what a coach is and does.

I want to give special recognition to my project adviser, Dr. James Williams, a fellow pastor, client, and friend, who allowed me to receive as much coaching from him during my coursework and project as I was giving to him. Pastor Richard Bennett and Dr. David Clark performed critical roles as editor and biblical adviser. AGTS D.Min. Project Coordinator Dr. Lois Olena performed admirably as one who constantly spurred me on to finish the next phase of the seemingly interminable project. I would also like to thank Rev. Timothy Schmidt, who graciously opened his heart and church budget to form a creative collaboration with me and our leadership team. Tim made it possible for a young man, Luis Miro, to first join his staff and then join our fellowship six months later as my successor.

Finally, I want to dedicate this work to my immediate family. My two adult sons, Nathan and Gabriel, have been the focus of my constant efforts to pass on my faith and values since their births. I also want to thank my wife, Beckie, who agreed to a succession process in 2014 leading to an end of my pastoral career and the beginning of a second half coaching career. Along our thirty-six year marital journey, she has been a

constant support to this musician, who became a pastor, who became a coach. Her allowances for the winds of change have not been without cost. That sacrifice I humbly acknowledge. I will always be grateful.

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CHAPTER 1: INTRODUCTION

Introduction

The U.S. Assemblies of God (AG) faces a crisis of leadership in the next decade as Baby Boomers leave their leadership positions as senior leaders of churches across the country. Statistics from a 2014 report by the General Secretary of the AG, Jim Bradford, reveal that nationally among lead pastors the median age of every level of credential—ordained, licensed, and certified—is above 50. In addition, 51 percent of lead pastors are over 55 years of age, with 19.4 percent being 65 years of age and older.¹ Although untested in this study, anecdotal evidence suggests the Assemblies of God is not alone in this situation concerning pastoral leadership. Each of these situations represents an inevitable transition from one senior leader to another in the next few years and certainly within the next decade. This study hopes to cast light on the need for getting in front of this transition tsunami through both education about and adoption of an intentional leadership succession plan.

Context of the Project

The genesis of this project emerges from four primary sources: my thirteen years as an associate pastor, twenty-two years as a senior leader who transitioned to a successor, my work as an advisor in three painful succession/transitions, and my role as a coach for a current church in succession.

¹ Statistics taken from the General Secretary's Office, "Age 2014 Lead Pastors.pdf," received by email on September 23, 2015.

The first thirteen years of my professional ministry were both chaotic and instructive. I served as an associate pastor in churches clustered around Dallas, Texas, and other locations in the South and Midwest. No assignment lasted more than two and a half years, and often the transitions between positions necessitated moving across state lines. In those years, I observed nine senior pastors from the second chair. I noted the things that took priority and the things and people that were deemed superfluous. I learned a great deal about leaving one situation and starting another both in my own experiences and as an observer of two leaders who appointed me the interim pastor of the church they were leaving.

Among the leadership experiences that accompanied my own senior pastorate in New England, I served as the president of the Lynn Shelter Association for six years plus two years as a board member. I also served as a presbyter for a geographical region of the Southern New England Network of AG churches. In the first situation I became the president of an imploding organization. The founding executive director had created a maelstrom of destruction that I first observed as a board member. In the middle of the chaos, I was asked to take the presidency of the agency. One of my first actions was to fire the executive director. I then hired a board member who agreed to lead the agency in new directions. However, after a few years, it was determined that he lacked the fiscal and moral underpinnings to succeed. Finally, shortly before leaving the agency, I oversaw the search for and hiring of the current executive director who has served for eight years.

As this process ended, a sister church in a nearby town, pastored by a long time friend, began to plunge into conflict. A member of my friend's elder board began to push

him to adopt increasingly uncomfortable positions regarding both orthodoxy and orthopraxy. People took sides, and everyone was confused. I was called in to be a listening ear to the elder board, a confidante and coach to my friend, and ultimately, a judicatory voice in a few large-scale congregational meetings. As a consequence, my friend decided to retire and appointed a staff person to serve as interim pastor. The pastor left with his head held high but with his heart nearly breaking.

Finally, in my role as presbyter, I was called into an ugly leadership tug of war in a succession process gone very wrong. The founding pastor of the church had served his congregation for over fifty years when, in his seventies, he was persuaded to look for a replacement. In conversation with the district superintendent, he was given the name of a man from another part of the country. This person went through the stages of resumé, interview, visit, and candidacy, as is the norm in most AG transition processes. He was elected and began serving the congregation. He immediately set in motion several fundamental changes that rocked some of the long established leaders and their followers. Within a couple of years, this man bowed out under the pressure of extreme criticism and personal discomfort.

The founder returned, changed the bylaws to reflect a more board-centric approach to leadership, and set about another search, this time without the help of the superintendent. A former intern was identified. Although serious questions were raised, he agreed to walk through the candidacy process and was elected. I was soon called in to aid in a rapidly deteriorating integration period. Meetings were held, voices were raised, accusations were loudly cast, and everyone was in pain. In summary, the founding pastor

left, along with his chief associate and most of the older members of the congregation. A new church started in a neighboring city, led by many of these same individuals.

While this situation was in full bloom, my own heart began to beat for another kind of leadership role. In 2010, I entered a doctoral program at the Assemblies of God Theological Seminary with an emphasis on professional coaching. As I became immersed in the required reading, attended courses, and interacted with professors and the members of the cohort, I realized my burden for pastoral ministry was lifting and a desire to coach other leaders was resting in its place. In 2013, I began to ask friends and colleagues if they knew someone who would be willing to become the next pastor of Lifepoint Church, the church I pastored for twenty-two years. As the process unfolded, I first thought of my longtime associate pastor, who had served faithfully in various capacities for over eight years. However, as she got married and began raising a family, her commitment to full-time ministry ebbed. My next thought was to groom my oldest son for the role. He worked for me upon graduation from Bible college for over a year. However, he and I realized that he was not the one to serve the church either.

Finally, while speaking with a neighboring pastor at lunch one day, I asked again, “Do you know a guy?” And, after a pause, he said, “I might.” Together, we worked for a year and crafted a creative collaboration process in which he brought the successor on staff in his church for a period of time while the successor got to know our leadership and eventually our congregation. After what turned out to be a short term of six months, the gentleman became the pastor of our church. Upon leaving, Lifepoint, I began to pursue leadership coaching as a full time occupation. In that role, I became a coach for a congregation of three hundred people in the northwest, who are in the first stages of a

three-year succession in which the senior pastor is grooming a long-term staff person (his son-in-law) to be the next senior leader of the church.

Leadership transitions are filled with potential, some good to great and some bad to awful. An intentional process of succession, resting on a culture of internal leadership development and informed by systems of early identification and thorough preparation, all bathed in prayerful humility, can reap a joyful harvest for every participating church leadership team. Transitions do not have to be found in the horror genre section of church studies.

The Problem

The Baby Boomer generation, comprised of people born between 1946 and 1964, are at or approaching retirement age. This generation serves in key positions of influence in industry, business, government, and religious service. If leaders within this generation simply turned in their keys to controlling boards and walked from their offices onto the nearest golf course, the organizations they led would lose their wealth of experience, perspective, and ongoing contributions. A careful process of leadership succession could leverage such experience and perspective, ensuring not only smoother transitions for organizations and carefully prepared successors, but also providing the outgoing leaders with potentially renegotiated positions of continued influence.

Change is inevitable, yet in many cases there is no discernible plan to guide and inform the outgoing leader or a controlling board. The business world has focused a great deal of energy and study on the field of leadership transition. The issue of succession in democratic forms of government is less visible because of the voting process, but in

highly centralized forms of tribal leadership, monarchies, and dictatorships it is still a viable process.

In ministry settings, pastoral transitions often occur as a result of resignation, retirement, conflict, moral failure, ill health, or death. These leadership transitions routinely occur without a well-considered plan. In some cases, when a church is healthy, the outgoing pastor recommends someone as the successor, perhaps a staff member or a person the congregation knows. However, in many situations, tensions prevent such an agreeable process. In these more unfavorable transitions, pastoral search committees often focus on attaining prospective leaders who are far different than the outgoing pastor, thereby ensuring long periods of adjustment. In addition, because of the lack of financial resources available to pastoral families, senior leaders stay with their churches well into their late sixties or seventies, sometimes outstripping their effectiveness. The leaders who surround them reflect the senior leader's age, and the churches, in turn, gray along with their leaders. Younger leaders have no place to plug into the churches and so find other ministries with pastors closer to their age who provide leadership slots for them and active ministries for their children and youth.

The Purpose

The purposes of this project are a) to provide resources to enhance understanding and b) offer coaching as a strategy to promote proactivity concerning leadership succession to select pastoral leaders in the Southern New England Ministry Network.

Definition of Terms

Apprenticeship model—a traditional one-to-one relational process of leadership development, heavily weighted with performance oversight, feedback, practice, and correction

Board of directors—a group of individuals tasked with fiduciary responsibility for an organization's welfare

CEO—chief executive officer of an organization who leads day-to-day operations and is the face of the institution

Coach approach—a deliberate process using focused conversations to create an environment for individual growth, purposeful action, and sustained improvement²

Coaching—individual or group communication based on a Socratic method of inquiry that invites individuals or groups to become self-aware and proactive while continuing to hold the keys to their own development and effectiveness

Coaching competencies—eleven foundational standards for coaching developed by the International Coach Federation, centered around four primary objectives: setting the foundation, co-creating the relationship, communicating effectively, and facilitating learning and results³

Competencies—organizationally specific moral, behavioral, emotional, professional, and sometimes spiritual standards against which employees and potential recruits are measured

² Madeleine Homan and Linda J. Miller, *Coaching in Organizations* (Hoboken, NJ: John Wiley and Sons, 2008), 7.

³ Jane Creswell, *Christ-Centered Coaching* (St. Louis, MO: Chalice Press, 2006), 139.

Culture—the history, traditions, and personality of an organization, often unwritten

Family business—an organization whose primary leadership positions are populated by members of the same family

Insiders, outsiders, and inside outsiders—candidates for leadership positions who are recruited internally (insiders), externally (outsiders), or externally yet possessing experience with the organization previous to their most recent external assignment (inside outsiders)

Leadership development—a system of early identification, training, education, and in-service work applications designed to fill future leadership vacancies

Leadership shelf life—the number of years a given leader can sustain energy, imagination, ambition, and a thirst for learning in the organization served

Leadership succession—the process of one leader following another by replacement

Legacy management—the careful planning of ongoing success designed to outlast one's own accomplishments in an organization

Polity—policies and procedures that guide the process, plans, and execution of business in an organization

Succession planning—the development of a sequential, detailed process whereby organizations can conduct the orderly replacement of one serving in a given position

Talent pools, pipelines, and benches—conceptual metaphors describing leaders in the making who are ready for assignments in varied capacities and roles within an

organization, who possess flexible skills and cross-training that provide potential in several key areas of work application

Description of the Proposed Project

Scope of the Project

This project will provide both resources to enhance understanding as well as coaching as a strategy to promote proactivity concerning leadership succession to select pastoral leaders. It will consist of six stages: developing a survey, identifying participants, conducting the pre-session survey, facilitating a seminar with a subset of the larger group using a coach approach, conducting a post-session survey, and conducting final evaluations. In the seminar, participants will explore themes based on the research from the biblical-theological and general literature reviews and explore ways to apply these themes to their unique situations.

This study will focus on the leadership subset of American church leaders over the age of fifty-five who serve as senior pastors of Assemblies of God churches in the Southern New England Ministry Network.⁴ Of these senior pastors identified, I will ask twenty to take the survey, and then I will invite ten to engage in a six-hour seminar presented with a coach approach. Topics covered by the seminar materials will include succession stories recorded in Scripture, leadership succession practices in corporate settings and family businesses, leadership succession in churches, change management theories, and strategies to address post-ministry life.

⁴ The Southern New England Ministry Network comprises Assemblies of God ministers and churches in a three-state area: Connecticut, Massachusetts, and Rhode Island.

Following the seminar, I will give the seminar participants an identical survey to the previous instrument regarding leadership succession. In addition, I will ask additional questions related to the coach approach taken in the seminar presentation. I will collate the reflections by theme, then compare the changes in readiness to accept and consider the adoption of an intentional succession plan between the study and control group, providing recommendations for the future as a result.

Phases of the Project

The project consists of five distinct phases: research, planning, implementation, evaluation, and writing.

Research

The first phase of this project will include research among biblical-theological sources with the goal of identifying and exploring themes of leadership succession found in Scripture. Commonalities among succession stories will be compiled and offered as best practices. Part two of the research phase will include exploration of leadership succession material emerging from the corporate world and a subset of that material focused on succession in family businesses. Part three of this research phase will include reading and drawing conclusions from change management resources and a review of a limited number of post-succession planning sources.

Biblical-Theological Literature Review

The biblical-theological literature review will first survey the overall theme of succession in Scripture, noting, with limited scriptural detail, certain transitions that carried great historical and spiritual significance. The bulk of this research will focus on

the succession transitions between Moses and Joshua, and David and Solomon in the Old Testament, and Paul and Timothy in the New Testament. A summary of each relationship will follow that subsection, which will feed into an overall conclusion seeking to draw best practices of leadership succession into sharp focus for future application.

General Literature Review

The second major area of research includes study in three primary pools of literature: corporate and family business succession, church succession, and change management. The material related to corporate leadership succession will focus on CEO succession, leadership identification and development models, succession strategies and processes, organizational culture, and talent management. Sources related to family businesses describe themes of founder syndrome solutions, family versus profit arguments, and successor preparation. In the burgeoning number of sources related to church succession, narrative descriptions of large church successions dominate the field. Two books will be closely examined that serve as the twin pillars of leadership succession in recent Protestant practices. Cultural issues, succession strategies, and statistical realities populate the pages of these seminal works. Change management sources will be briefly cited in their application to both the organization/church as a whole as well as the outgoing leader.

Planning

Following the successful conclusion of the research chapters, a multiple choice survey will be developed around the following topics: succession awareness, succession preparation, change readiness, and a future plan. The final version of the survey is designed to be distributed to all Assemblies of God senior pastors over fifty-five years of

age in the Southern New England Network. These pastors will be identified by data provided by the network office. The survey will be reviewed and vetted by a pilot group of experienced leaders for comprehension and accuracy of purpose. An e-mail invitation will be created to direct each of the Southern New England ministers to the online survey. The e-mail will mention an opportunity to join a seminar to be presented on Boston's north shore. Material shall be assembled for the six hour seminar entitled "A Coach Approach to Leadership Succession." Date and location of the seminar shall be established as well as refreshments and gifts prepared for those attending the seminar. The post-seminar survey will be amended with a few additional questions regarding the effectiveness of the coaching model in learning.

Implementation

The first draft of the survey will be submitted Dr. Jeff Fulks of Evangel University for an initial review. Upon a conclusion of all edits, the amended survey, now established online through a company that distributes research surveys for Evangel University, will be submitted to a small pilot group of experienced leaders for evaluation regarding content, purpose, and comprehension. After another round of edits, the completed survey will be ready for use. All senior/lead pastors over fifty-five years of age in the Southern New England Network of the Assemblies of God will be identified. Each of them will receive an e-mail invitation with two parts. Part one directs them to complete the online survey through a hyperlink. Part two invites them to a six-hour seminar entitled "A Coach Approach to Leadership Succession" to be held in a local church on the north shore of Boston.

The smaller subset of senior pastors will be given additional information regarding the seminar. Material will be developed for the seminar from material used in both research chapters of the project as well as other supplemental study materials. The seminar will be conducted with a final assignment given to each participant to take another online survey regarding the theme of leadership succession. The final survey will be exactly the same content, however, it will include several additional questions regarding the veracity and effect of the coach approach to learning and the application of the material studied. The seminar will be conducted on Thursday, November 5, 2015.

Evaluation

The evaluation phase of this project will include statistical comparisons of results from all initial completed surveys. These results will be compared to the post-seminar survey results of the select group of seminar attendees. A professional statistician will be engaged to determine the presence and significance of seminar effectiveness on shifting opinions toward a more favorable intentionality regarding succession. From this statistical analysis, recommendations will be made for future training and information distribution for the adoption and implementation of tailored succession planning. The evaluation phase will occur in November 2015.

Writing

The writing phase of this project will begin with the biblical-theological chapter (2) research. The close proximity of Gordon-Conwell Theological Seminary will allow a comprehensive examination of local and online sources. The first chapter will be started in the spring of 2014 and concluded midsummer. The general literature chapter (3) research will begin in the winter of 2014 and conclude in late spring of 2015. The survey

will be designed, edited, and completed by midsummer 2015 and distributed in September and October. The seminar will be conducted on November 5, 2015, with the statistical results completed by the end of November. Chapter 1, the abstract, acknowledgments, and appendices material will be completed during November 2015 with room left for the final summary completed by the first week in December 2015.

Conclusion

As senior pastors near the age of sixty, the question of what is on the horizon for them and their churches begins to receive increasing consideration. The possibility of another move becomes less desirable and the opportunity to plant a church is even more remote. Thoughts of the legacy one leaves also take shape. In situations where the pastor is the founder of the church or a long time leader, the opportunity to build on what has been done becomes vitally important. Intentional leadership succession makes such continuity not only possible, but viable. Often the only factor separating an organization from long-term effectiveness is an executable strategy for healthy succession.

Getting from concept to reality to implementation includes gathering information, establishing a plan, identifying a successor, and implementing the resultant plan under the watchful help of an outside coach or consultant. Tools to shape the process and case studies of best (and worst) practices are readily available. However, a succession without a successor is a non-starter. Therefore, the success of succession is rooted in a culture of continual leadership identification and development present not only in each local church, but also in the regional aggregate of churches. Successful church transitions rest on the foundation of who will come next. Stripped of all the processes and plans, this generational relay of leadership begins with discipleship. If local churches recover their

mandate to make disciples, many will become leaders and some will become senior leaders, capable of inspiring congregations to spread the mandate of discipleship to more and more communities, the ultimate goal of succession.

CHAPTER 2: BIBLICAL-THEOLOGICAL LITERATURE REVIEW

Introduction

This chapter focuses on the elements of leadership succession most evident in the pages of Scripture. Beginning with a brief introduction to biblical succession to demonstrate its prevalence in Scripture, the chapter proceeds to take a detailed look at three key relational pairs, Moses/Joshua, David/Solomon, and Paul/Timothy. The elements discovered will be compiled and compared in an attempt to apply them to contemporary pastoral transitions. Although the context, leadership tasks, and assets of every succession vary greatly, a singular purpose defines each one—a preservation of the knowledge of God. This knowledge includes truths about God and His dealings with previous generations but also an opportunity to know God through personal fellowship and obedience.

Each generation deserves the opportunity to experience life with God. John illustrates this truth in his first letter: “We proclaim to you what we have seen and heard, so that you also may have fellowship with us. And our fellowship is with the Father and with his Son, Jesus Christ” (1 John 1:3).¹ John describes a transmission of stories and experiences about Jesus to others in order for the hearers to experience the same relationship with God enjoyed by the disciples. Jesus echoes this heavenly goal when He

¹ Unless otherwise noted, all Scripture quotations are taken from the New International Version.

prays: “My prayer is not for them alone. I pray also for those who will believe in me through their message, that all of them may be one, Father, just as you are in me and I am in you. May they also be in us so that the world may believe that you have sent me” (John 17:20-21).

From Adam to John, the Bible records a litany of generational transitions characterized by preservation of the message of hope found in God. When Christ appeared, hope became incarnate in the “living God” (1 Tim. 4:10). Followers of Jesus became leaders among an increasingly wider audience, sharing the message of Christ. This momentum of generational transmission continues unabated today.

Such an important message should therefore be matched with an equally important, fully competent leader to relay it. If John Maxwell’s assertion is true, that “everything rises and falls on leadership,”² then such leadership should be entrusted to reliable, qualified people. Paul’s admonition to Timothy in 2 Timothy 2:2 points to this: “And the things you have heard me say in the presence of many witnesses entrust to reliable men who will also be qualified to teach others.” “Timothy, as Paul’s delegate and successor was to oversee the appointment and training of new leaders, so that the community would be able in succeeding generations to carry out God’s mission with the church in the world.”³ Conversely, poor leaders and inadequate leadership transitions result in roadblocks and barriers to further transmission of the message of hope to the following generations.

² John C. Maxwell, *The 21 Irrefutable Laws of Leadership* (Nashville: Thomas Nelson, 1998), 225.

³ Jack Barentsen, *Emerging Leadership in the Pauline Mission* (Eugene, OR: Pickwick Publications, 2011), 296.

The biblical record provides three in-depth portraits of what an outgoing leader looked for and promoted in the life of his successor. In each case, the message endured for one more generation. Therefore, examining the components of these leadership transitions provides a template for contemporary leaders to establish their own long-term, healthy successions. The message of God's desire for fellowship with humankind is too important to do otherwise.

A Brief Introduction to Biblical Succession

The dynamics of succession permeate the Scriptures. This brief introduction illustrates the prevalence of succession at key junctures in both Old and New Testaments. Biblical succession begins with Adam, continues through the patriarchs, the judges, kings, and prophets of Israel, and eventually spills over into the life and times of Jesus and His followers. However, succession functioned differently in each social construct.

A common element among ancient tribal communities regarding succession featured the passing of authority and goods to the oldest son of the clan, a practice portrayed in the deceit of Rebekah and Jacob to wrest such family control from Esau, the rightful heir (Gen. 27). The discovery of tablets in ancient Nuzi (modern Yorgham Tepe) in northern Iraq confirmed these practices, which provided scholars with information concerning legal customs of the fifteenth century BC, customs with parallels in the patriarchal narratives.⁴ In the succession stories of Abraham and Isaac, each solved the conflicts brought on by choosing the younger over the older by separation and a division of goods. Succession in Jacob's family was in no way intentional, emerging instead from

⁴ James M. Freeman and Harold J. Chadwick, *Manners & Customs of the Bible* (North Brunswick, NJ: Bridge-Logos Publishers, 1998), 44.

the eleventh son, who was cast away by the others yet saved by God to make a broad impact on that region of the world and the salvation of his immediate family. In each case, God approved such unorthodox choices.

Over four hundred years passed before Moses and his young assistant Joshua provided the first detailed picture of an organized plan of succession, all within the context of a modified theocracy. Unfortunately, the healthy leadership transition from Moses to Joshua did not continue in the period of the judges. “It seems that Joshua’s failure to train future leaders has led to Israel not knowing Yahweh, not obeying Yahweh, and thus not driving out the people who remain. In Judges, this portrayal of Joshua’s leadership sets the pattern for leadership. No judge trains someone to follow.”⁵ A footnote to Othniel’s success as a military leader who defeated the King of Aram typifies the pattern of single generation rule: “So the land had peace for forty years, until Othniel son of Kenaz died” (Judg. 3:11). Other judges sired numerous children, but none filled the role their father’s death left vacant.

This pattern of “one offs” continued through Samuel’s rule as the last true judge of Israel. Samuel’s predecessor and mentor, Eli, failed to discipline his adult sons. “Though they could have expected to inherit their father’s position, authority and power, by their own willfulness and sinfulness, they so offended the Lord, and their father, that they were disqualified from even being servants.”⁶ Ironically, Samuel’s children likewise proved themselves unfaithful to the ethical and spiritual maturity needed to succeed their father. God chose Samuel to then appoint Saul as the first king of Israel, a man whom

⁵ Trent C. Butler, *Word Biblical Commentary* 8 (Nashville: Thomas Nelson, 2009), ix.

⁶ Kay A. Fountain, “An Investigation into Successful Leadership Transitions in the Old Testament,” *Asian Journal of Pentecostal Studies* 7, no. 2 (2004): 198.

God rejected for rash decisions and disobedience. The death of Saul and his only surviving son Ish-Bosheth marked the end of one family's rule and ushered in the reign of David, a man of whom God said, "Your house and your kingdom will endure forever before me; your throne will be established forever" (2 Sam 7:16).

The succession of David to Solomon receives detailed treatment in the next section. However, Solomon's successor, Rehoboam, suffered the loss of ten tribes of Israel through opposition and his own failure to discern the times. Other kings followed in what became two contiguous kingdoms with occasional solutions to the succession conundrum, yet they were few and far between. In fact, "the procedure of getting rid of a dynasty by killing the son and successor is repeated a number of times in the history of Israel (see 1 Kgs 16:2; 2 Kgs 15:10, 14, 25, 30)."⁷

A notable succession process is chronicled in 1 Kings 19:16-21 and 2 Kings 2:1-11 in which God instructs Elijah to anoint "Elisha ... to succeed you as prophet" (1 Kings 19:16). Thus, Elisha "set out to follow Elijah and became his attendant" (v. 21). Elisha is a silent companion to Elijah until the day of Elijah's unusual leave taking. Because Elisha fulfilled his mentor's requirement that he be present when Elijah was taken away, the double portion of Elijah was available to his successor. "Elijah introduced the cloak as a symbol of succession (2 Kgs 2:13) when he first anointed Elisha as his successor (1 Kgs 19:19). In the return crossing of the Jordan Elisha calls for the same demonstration of divine provision as was given Elijah (2 Kgs 2:14)."⁸ Indeed, after Elisha strikes the water

⁷ Volkmar Fritz, *1 & 2 Kings: A Continental Commentary* (Minneapolis, MN: Fortress Press, 2003), 169.

⁸ August H. Konkel, *The NIV Application Commentary: 1 & 2 Kings* (Grand Rapids, MI: Zondervan, 2006), 380.

with his mentor's cloak and the water parts, the other prophets declare emphatically that "the spirit of Elijah is resting on Elisha" (2 Kings 2:15). "The word used here for spirit [*ru'ah*] is the same word God uses to describe Joshua to Moses (*'Single out Joshua ... an inspired man' - ish asher ru'ah bo*, Num. 27:18) and which describes Joshua following Moses' death (*filled with the spirit - malei ru'ah*, Deut. 34:9)."⁹

Turning to the New Testament, "Jesus managed two major leadership transitions in His life. He managed the succession of His predecessor, and He managed His own departure."¹⁰ Regarding His cousin, compliments directed toward John peppered Jesus' public statements while the two ministered in close proximity to one another and later, after John was murdered. About himself, Jesus left no room for confusion at either the beginning of His work or the end, saying, "Today this scripture is fulfilled in your hearing," (Luke 4:21) and, "In a little while you will see me no more" (John 16:16). In the first statement, Jesus declares himself to be the one prophesied to come, closing the chapter of His cousin's work. In the latter statement, He prepares His followers for His leaving and emphasizes the help of the Holy Spirit in filling His role in their lives. His succession plan included a hands-on approach with the disciples for a number of years, but once He ascended, the real engine for their success became God's continued presence embodied in the Holy Spirit's arrival within each believer.

Peter's story achieves prominence in the first twelve chapters of Acts. However, aside from church tradition, little is known of his work following his escape from

⁹ David J. Zucker, "Elijah and Elisha part 1 Moses and Joshua," *Jewish Bible Quarterly* 40, no. 4 (2012): 229.

¹⁰ Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom* (San Francisco: Jossey-Bass, 2004), 16.

Herod's murderous plan for a public trial following the Passover feast. Regarding succession, Peter was often seen in the company of peers such as John in Acts 3, 4, and 8, and certain believers from Joppa in chapter 10. However, the Bible is silent on Peter's development of the kind of team around him that provides the seed bed in which succession grows.

Paul evidenced marked intentionality toward successors, resting as it were, on his own calling from Christ. Note the following passages from 1 Timothy: "Paul, an apostle of Christ Jesus by the command of God our savior..." (1:1). "I thank Christ Jesus our Lord, who has given me strength, that he considered me trustworthy, appointing me to his service" (v. 12). "And for this purpose I was appointed a herald and an apostle ... a true and faithful teacher of the Gentiles" (2:7). In contemporary terms, Paul built a leadership pipeline from which to draw church planters, teachers and evangelists for work in the cities around the Mediterranean.

Three Biblical Examples of Leadership Succession

This section explores three relationships in detail. Two come from Israel's history, and the third is from Paul's ministry as recorded in the New Testament. The story of Moses and Joshua begins the study, followed by David's choice of Solomon as the next king of Israel. Finally, the relationship of Paul and Timothy illustrates valuable principles of passing on the trust of the gospel from one leader to the next. Each story taps into a rich vein of biblical material, allowing the reader an opportunity to examine each leader in great detail. In each case, a history of the relationship will be established along with a context for the text to be examined, a careful interpretation of the text itself, and the resulting factors that enhance a deeper understanding of leadership succession

that can be applied to contemporary settings. I will draw out common characteristics of both the outgoing and incoming leader that point to an effective succession and also note certain negative characteristics that can derail succession.¹¹

Moses and Joshua

The Book of Exodus introduces the beginnings of Israel's centuries-long existence as a "virtual theocracy, with the non-hereditary leaders elected by divine call and acknowledged by the people."¹² This leadership process began with Moses, continued through Joshua, the judges, and concluded in the life of David, the second king of Israel, when David asserts his authority in declaring his son Solomon successor to his throne. The succession plans of Moses to Joshua and David to Solomon bookend this Old Testament view of leadership transitions. Before Moses, the patriarchs assigned succession to sons from a variety of positions in the birth order. After David, at least in the southern kingdom of Judah, succession moved in most cases from father to son.

History and Context

The first mention of Joshua occurs abruptly in Exodus 17 as Moses selects him to lead the Israelites into battle against the Amalekites. This military role echoes the meaning of his name ("Yahweh saves," Heb., *yehôshûa*)¹³ as well as the future task of

¹¹ Some who read this chapter might question the exclusion of Jesus' choice of His disciples as an object of this study aside from a few previous comments. Several factors influenced that exclusion, the most prominent of which is Jesus' training of groups of disciples, not simply one. Because the application of this study is pastoral succession, a closer look at the model of disciple making falls outside the purview of our efforts.

¹² I. Howard Marshall, J. I. Packer, D. J. Wiseman and A. R. Millard, eds., *New Bible Dictionary*, 3rd ed. (Downers Grove, IL: InterVarsity Press, 1996), 350.

¹³ Merrill C. Tenney and Moises Silva, eds., *The Zondervan Encyclopedia of the Bible, Vol. 3* (Grand Rapids, MI: Zondervan, 2009), 793.

conquering the people inhabiting the land of Canaan. Joshua is mentioned again in Exodus 24:13 when he accompanies Moses up Mount Sinai to receive the Ten Commandments. “Joshua’s first reported words may reveal something of his military instincts. As he and Moses descend Mount Sinai, Joshua immediately interprets the shouting coming from the direction of Israel’s camp as ‘the sound of war’ ([Exodus] 32:17).”¹⁴

In Exodus 33:11, Joshua seems to be a guard or keeper in the tent of meeting: “The LORD would speak to Moses face to face, as a man speaks with his friend. Then Moses would return to the camp, but his young aide Joshua son of Nun did not leave the tent.” Apparently, “what the Levites do for the sanctuary tent, Joshua does for the tent of meeting (v. 11b). Anybody can approach the tent if they are on a God-seeking mission (Ex 33:7b); at least they can go ‘out’ to it, but not necessarily ‘into’ it. Perhaps that is why Joshua seems to be a permanent resident in the tent: to prevent unauthorized entrance.”¹⁵ As a companion to Moses inside the tent while the Lord spoke, Joshua could have been more than simply an observer, a privilege afforded him later, during the succession process.

Later, Joshua complained vigorously to Moses concerning certain elders who prophesied in the camp. Moses mildly rebuked his protective charge, saying “‘Are you jealous for my sake? I wish that all the LORD’s people were prophets and that the LORD would put his Spirit on them!’” (Num. 11:29). Each of these brief accounts underlines the

¹⁴ Robert L. Hubbard, *The NIV Application Commentary: Joshua* (Grand Rapids, MI: Zondervan, 2009), 25.

¹⁵ Victor P. Hamilton, *Exodus: An Exegetical Commentary* (Grand Rapids, MI: Baker Academic, 2011), 561.

unique aspect of Moses' relationship with Joshua, a man who had permission to speak freely and often to his mentor. Just prior to the writer introducing Joshua's objections in this text, he notes Joshua was first, the son of Nun, and second, that he served as Moses' aide from his youth (Num. 11:28). The word "aide" or "assistant" used to describe Joshua in his relationship to Moses is a common designation of one who serves another. It also refers to service in the sanctuary (Num. 4:12; 2 Chron. 24:13). The Hebrew root implies honorable service to which one is called or which is undertaken voluntarily.¹⁶

The final mention of Joshua prior to thirty-eight years of wandering in the desert occurred in the story of spying out the land of Canaan as Israel settled at Kadesh Barnea (Num. 13). God instructs Moses to send leaders from each of the tribes to look over Canaan. Moses did so and the writer repeats the fact that all of the men chosen were "leaders of the Israelites" (Num. 13:3). Joshua is considered not only Moses' aide, but also a leader of his tribe, the Ephraimites. The tribal chief from Judah, Caleb son of Jephunneh, became the lone spokesman for conquering the land of Canaan alongside Joshua. The people believed the fearful reports of the other ten spies, an act that brought Moses and Aaron "facedown upon the ground in humble submission before God and in merciful propitiation before the people. Then in concerted response to their leaders' self-humiliation, the two faithful scouts Joshua and Caleb ripped open their cloaks in an act of great remorse and contrition."¹⁷ The people's rebellion resulted in an entire generation of people who had seen miracle after miracle dying in the desert over the next thirty-eight

¹⁶ Marten H. Woudstra, *The Book of Joshua*, The New International Commentary on the Old Testament (Grand Rapids, MI: Eerdmans, 1981), 57.

¹⁷ R. Dennis Cole, *The New American Commentary: Numbers* (Nashville: Broadman & Holman, 2000), 226.

years. Interestingly, Joshua's name no longer appears in the chronicles of wars and wandering until the end of Moses' life draws near and the succession process unfolds.

Transfer and Commissioning

Three texts report the succession of leadership from Moses to Joshua (Num. 27:15-23; Deut. 3:21-22; 28; 31:1-29). The Numbers passage focuses on the reason a successor was needed (Moses' death) and the means by which Joshua was empowered and commissioned. The first Deuteronomy passage notes Moses' conversation with Joshua regarding future military conquests in light of the recent defeats of Sihon and Og, and God's statement to Moses regarding the need for commissioning and encouraging his successor. The second Deuteronomy passage emphasizes "Joshua's role in leading Israel to take possession of the Promised Land and continues the themes of obedience and disobedience prominent in preceding materials."¹⁸ The careful, detailed treatment of this leadership transition coincides with the equally important transition in the nation of Israel from homeless wanderers to owners of a promised homeland.

In Numbers 27:15-23, a compressed series of events outline the initial request from Moses for a successor, God's response, and the public commissioning ceremony that installed Joshua to his new role. The conversation between God and Moses in Numbers 27 takes place on the heels of God's reminder to Moses that he will not enter the Promised Land because of failed obedience at Meribah Kadesh. Moses responds by asking God for someone to take the people of Israel into the next stage of God's promise. His use of the phrase in verse 16, "the God of the spirits of all mankind" is only used here

¹⁸ Desmond T. Alexander and David W. Baker, eds., *Dictionary of the Old Testament: Pentateuch* (Downers Grove, IL: InterVarsity Press, 2003), 479.

and in an impassioned plea to God recorded in Numbers 16:22 during Korah's rebellion in which Moses pled with God to express mercy for the majority of Israelites caught up in the rebellion of a few. The parallel chapter 27 again points toward the entirety of the nation, yet the request is for a different brand of mercy - not a stayed hand of destruction, but a steady hand of direction. A further difference between the two texts emerges in the grammatical person used for Moses' prayer. In his earlier passionate plea, Moses uses a more intimate second person to communicate with God. Here, as evidenced perhaps by a loss of intimacy in the face of perceived guilt or shame, Moses "adopts the third person address characteristic of the sinful petitioner who has fallen out of grace."¹⁹

God responds to Moses' request by selecting Joshua and, after referring to an overarching qualification ("a man in whom is the spirit," Num. 27:18), immediately outlines the procedures for transfer of authority, recognition, and leadership.²⁰

The prescribed method for transfer of leadership includes three separate actions. First, Moses is to lay his hands on Joshua. This ceremony is significant and can accompany a blessing, a sacrificial offering, or serve as a dedication to office. The purpose of these rituals seemed to center around the transference of a quality or

¹⁹ Jacob Milgrom, *The JPS Torah Commentary: Numbers* (Philadelphia: The Jewish Publication Society, 1989), 234.

²⁰ Scholars differ in their understanding of the word "spirit" (*rûah*) used in verse 18. Some refer to the "spirit of wisdom" used in 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." However, this passage implies a cause and effect, listing first Moses' laying his hands on Joshua and the consequential filling. The passage in Numbers flatly states the spirit already resides in Joshua previous to the formal transfer of authority. Other scholars refer to the spirit of skill present in craftsmen such as Bezalel and Oholiab who created the tabernacle and its furnishings during the desert wanderings. Because most occurrences of the Spirit's arrival in the Old Testament appears as "coming upon" rather than "resting in," as so noted in Numbers 27:18, and because the speaker in this instance was God himself, an accurate understanding of the text should refer to the ongoing presence of "the" Spirit of God, although a specific event for such a first filling is absent.

responsibility from one to another. In later times, the laying on of hands accompanied one's admittance to the office of rabbi,²¹ and in Christian practice it accompanied the designation of leaders or the conferring of a spiritual gift (Acts 6:6; 13:3; 1 Tim. 3:14; 2 Tim. 1:6).²²

The second action God required for Joshua is a presentation before Eleazar the priest and the entire community. Just as the Levites were presented to Aaron for service in Numbers 3:6 and 8:13, so Joshua is presented to the son of Aaron for shared leadership.

The third action God asks Moses to take is to charge Joshua, (literally "to command" him), to "give him some of your authority so the whole Israelite community will obey him" (Num. 27:20). This text reminds the reader of the incident in Numbers 11 in which God takes "of the Spirit that is on you and put the Spirit on them" (v. 17), referring to the seventy-two elders whom Moses chose to share his burden of leadership, now denoting the still shared nature of his temporary co-regency with Joshua.

The final passages referring to the succession of Joshua as leader of Israel are found in the fifth book of Moses called Deuteronomy, literally "second law." However, it is not a separate set of laws from those already presented by Moses. Instead it is a "literary record of a spoken address (or series of addresses) which has been given the form of a covenant document."²³ These addresses or sermons were meant to remind a

²¹ Erwin Fahlbusch, *The Encyclopedia of Christianity: J-O* (Grand Rapids, MI: Eerdmans, 2003), 235.

²² Timothy R. Ashley, *The Book of Numbers*, The New International Commentary on the Old Testament (Grand Rapids, MI: Eerdmans, 1993), 552.

²³ Peter C. Craigie, *The Book of Deuteronomy*, The New International Commentary on the Old Testament (Grand Rapids, MI: Eerdmans, 1976), 18.

new generation of the need for obedience to God in light of their leader's impending death and their eventual entry to the land promised to their ancestor Abraham.

God uses three words to describe Moses' responsibility toward his successor: commission, encourage, and strengthen. The first word refers to the public transfer of authority and leadership referred to in Numbers 27. The final two words imply a personal friendship naturally resulting from their close, long-term relationship. It is also a stock expression, elsewhere formulated as a command: "Be strong and courageous" (Deut. 31:6, 7, 23).²⁴ Expressed in Deuteronomy 31 and repeated by God in Joshua 1, this command elicits allegiance from a young leader stepping into an almost impossible role as successor to Moses. It also serves as a mandate for the people of Israel to step up and support him.

Moses' Public Commissioning

Deuteronomy 31:1-8 is similar to the final journey of Elijah and Elisha in which the mentor walks through a series of towns toward an expected exit and shares the experience with his successor (2 Kings 2). Joshua shared each experience in the final days of Moses' life, except for Moses' death on Mount Nebo, whether in front of the people for Joshua's commissioning, the recitation of a song God gave to Moses for the people, or God's own commissioning of Joshua in front of the Tent of Meeting.

Deuteronomy 31 begins in yet one more public setting.

The narrative orientation of Deuteronomy 1-3 is taken up again as chapter 31 opens. "The covenant text has been fully revealed (Deut. 4-30), its stipulations offered to

²⁴ Jack R. Lundbom, *Deuteronomy: A Commentary* (Grand Rapids, MI: Eerdmans, 2013), 228.

and accepted by the assembly, and its blessings and curses invoked as testimony to their pledge to obey it. Finally the time has come for the community that is about to leave its encampment on the way to conquest to embrace the covenant as its guiding principle.”²⁵

The consequent actions mark the final stages of Moses’ life in the appointment of Joshua, the storage of the Law in the ark, and two final messages—one of blessings to be enjoyed and warning if disobedience ensues.

The succession of Joshua had already been made public before Eleazar and the entire congregation in Numbers 27. Two passages in Deuteronomy 31 round out the formal transfer of authority to Joshua. Verses 1-8 are a record of Moses addressing two distinct audiences—all of Israel and only Joshua. To the nation, Moses refers to the crossing of the Jordan and to the battles to come using past victories as a lens through which Israel can absorb courage and strength. God’s presence also builds assurance in the people, underlined by a powerful phrase repeated in verses 6 and 8, “He [God] will never leave you nor forsake you.” Regardless of the leader, the promises and commands are exactly the same: God is with you, fear not, and be strong and courageous.

God’s Private Endorsement

The second passage in Deuteronomy 31 records God’s direct communication to Joshua. “The LORD said to Moses, ‘Now the day of your death is near. Call Joshua and present yourselves at the Tent of Meeting, where I will commission him.’ The LORD appeared at the Tent in a pillar of cloud, and the cloud stood over the entrance to the Tent” (vv. 14-15). Interestingly, this is the only reference to the tent of meeting in

²⁵ Eugene H. Merrill, *The New American Commentary: Deuteronomy* (Nashville: Broadman and Holman, 1994), 395.

Deuteronomy. Here Joshua often remained after Moses left (Exod. 33:11). The importance of this moment between these leaders of Israel and God cannot be overemphasized. When the two men are gathered, God speaks to Moses about the disasters to accompany Israel's disobedience. Then God directly instructs Joshua, "Be strong and courageous, for you will bring the Israelites into the land I promised them on oath, and I myself will be with you" (Deut. 31:23). Although the words of his mentor ring true that "the LORD himself goes before you and will be with you" (v. 8), the impact of God's voice emanating from the cloud in front of the tent personally declaring such intentions engenders unmeasured trust in God's companionship and aid. "Of the forms of loneliness that a man can experience, there are few so bleak as the loneliness of leadership. But Joshua assumed his lonely role with an assurance of companionship and strength. God's presence with him would be sufficient to enable him to meet boldly every obstacle that the future could bring."²⁶ Indeed, these words would be repeated by the LORD once more after the death of Moses as Joshua faces the dangers and rewards awaiting in Canaan (Josh. 1:6-7).

A Final Note

Many of the experiences of Moses are mirrored in the life of his successor, such as a commissioning by God, a dramatic, miraculous crossing of a body of water, uplifted arms during battle, proclamation of instructions, farewell speeches, a covenant ceremony, burial report, and an editor's eulogy.²⁷ "In the end, the narrator affirms the Moses-like stature that Joshua achieves by posthumously awarding him the same prestigious title that

²⁶ Craigie, 373.

²⁷ Hubbard, 57.

Moses, ‘servant of the Lord’ (24:29) bore.”²⁸ The fulfillment of land acquisition and conquest by Joshua and the tribes of Israel indeed secured his place alongside his mentor as a faithful steward of a great nation. Ironically, “Joshua makes no provision for a successor, and the only indication of the future shape of leadership in the post-Joshua situation is of a nation with a decentralized governmental structure consisting of elders, ancestral heads, judges, officers and priests (23:2; 24:1, 24, 31, 33).”²⁹ This fractured confederation of tribes found little common ground and certainly no central voice to guide them in their new home.

Table 1. Succession chronology from Moses to Joshua

<i>Event Description</i>	<i>Audience</i>	<i>Text</i>	<i>Promises, Instructions, Results</i>
Moses asks for a successor	God	Num. 27:16	
God names Joshua	Moses	Num. 27:18	“a man in whom is the spirit”
God gives commissioning details	Moses	Num. 27:19-21	commission publicly, give him some authority, link him with Eleazar the priest
Moses commissions Joshua	Israel	Num. 27:22-23	lays on hands in front of Eleazar/people
Moses addresses Israel and Joshua after review of law	Israel	Deut. 31:1-8	God’s presence promised, courage and strength commanded, conquest and division assigned
God asks Moses and Joshua to the tent of meeting	Moses and Joshua alone	Deut. 31:14	a song is assigned to both men to be taught to the people (vv. 15-22)
God commissions Joshua	Joshua	Deut. 31:23	victory and God’s presence assured

Summary and Present Day Implications

The relationship between Moses and Joshua illustrates many of the characteristics of strong leadership transitions, repeated in the two following relationships. Great successions weave four strong threads together to truly succeed; the outgoing leader, incoming leader, God, and the people they serve. Those relationship interweave the following characteristics.

²⁸ Hubbard, 58.

²⁹ Greg Goswell “Joshua and Kingship,” *Bulletin For Biblical Research* 23, no. 1 (2013): 37.

God's Calling

Just as God called Moses from a burning bush, so God designated Joshua to succeed Moses as leader of Israel. Although networking, assessments, resumes, and interviews help surface candidates to succeed an existing leader, no process supersedes or replaces the need to hear from God. God's work requires God's person for the work. Fortunately, the person God identified to follow Moses walked with him for decades before God expressed His will to Moses. The following characteristic of succession, therefore, follows hard on the heels of God's call.

Long-term Service

The difficulty of identifying a successor greatly increases if a search outside the organization is required. Moses needed no such search process. He simply turned to his longtime assistant and prepared him for his next assignment. Moses and Joshua shared almost every experience of leading the nation of Israel from the parting of the Red Sea to the defeat of the Moabites on the cusp of the Jordan River. Joshua ate manna every day, heard God speak from both the mountain and within the tent of meeting. He was jealous for Moses, loyal, and intimately aware of the challenges and heartaches of leading Israel. When a leader comes from within an organization after a lengthy time of service, little time must be spent on cultural, structural, or even personnel issues. Instead, conversations immediately progress to vision alignment and transition plans for both parties. Although there are biblical exceptions to this principle, far more examples display the benefits of mutual work over time prior to succession. The "from among you" principle is seen in both testaments. Jesus lived with His disciples for several years before departing. When the apostles urged the burgeoning church to assign more leaders to help them, they asked

for people to “choose seven men from among you who are known” (Acts 6:3). The Holy Spirit chose Barnabas and Paul from among the elders in Antioch. Leaders from within an organization enjoy the benefits of familiarity and have an immediate opportunity to establish a track record of success.

Transfer of Authority

God specifically tasked Moses to “give him [Joshua] some of your authority so the whole Israelite community will obey him” (Num. 27:20). One of the primary benefits of long-term mentoring is the ability to provide a successor with significant responsibility from which both leaders as well as their organization can learn. Joshua led the people in Israel as their military general against the Amalekites. He appeared with Moses as his trusted aide. He represented his tribe as one of the twelve spies sent into Canaan to generate a report for the nation’s next steps. Therefore, when God marked Joshua as Moses’ successor, Israel embraced him readily. A leader who comes up through the ranks and proves himself faithful in various roles and tasks achieves far greater and quicker acceptance than someone who must showcase his personality, methods, and communication style to a new, often skeptical audience.

Private and Public Commissioning

Moses made God’s choice of his successor known to the people by laying hands on him before the people, anointing and dedicating him to serve, and presenting him before Eleazar, God’s spiritual representative among the people. Moses also charged Joshua to be strong and courageous, and reminded him that God would be with him. In addition, God met with Moses and Joshua privately, repeating the charge and promise Moses had used before the people. It is difficult to imagine the depth of responsibility and

honor Joshua felt in these settings. Compare that experience with transitions that have followed a year or more of resume sifting and candidate interviews. Although a denominational executive often attempts to fill the role of commissioner during an installation service, the effects are diluted due to the uneasy relationship of a new leader with an existing congregation. If the congregation loved and cherished the outgoing leader, this ceremonial transition provides a blessing for a successor that moves credibility forward dramatically.

Strength and Courage Commanded

The admonition to strength and courage strikingly emerges from the mouths of God, Moses, and the people of Israel as Joshua begins his role. “Be strong and courageous, because you will lead these people to inherit the land I swore to their forefathers to give them. Be strong and very courageous” (Josh. 1:6-7). Moses began his service of God with a long line of excuses and at times over the next forty years of leadership lived on the edge of deep frustration and disappointment as the people he led refused to obey either himself or the God who led them all. The task given to Joshua varied considerably in scope and specificity. His assignment included the displacement and death of the inhabitants of dozens of city-states and the eventual homestead development for each tribe, not only in Canaan but also outside its boundaries. Courage, boldness, and great strength would be required to lead this great effort. Any leader given the responsibility to speak for God routinely must possess courage whether the venue is a boardroom, the pulpit, or across from someone in a coffee shop. Great influence demands boldness and strength of conviction. People look to their leaders for clarity of vision, well-considered direction, and hope-filled communication. Timidity, hesitation, and

indecision form a dangerous brew in which strife and discouragement grow strong. Courage inspires unity and forward movement, qualities needed to break sin's hold on communities and families.

God's Presence

Moses wisely advocated for his entire people even in the moments of God's great wrath and deep disappointment over the disobedience of Israel. God threatened to begin a new nation from the loins of His friend and reiterated His commitment to His continued presence with Moses. However, Moses changed God's promised presence from "me" to "us." "If your Presence does not go with us, do not send us up from here" (Exod. 33:15). The record of the nation's wandering reflected that constant presence up to the moment Moses' eyes closed in death. To Joshua then, God makes the same commitment, "As I was with Moses, so I will be with you; I will never leave you nor forsake you" (Josh. 1:5). As Elisha stepped up to that river with his mentor's cloak and stuck the waters to part them, so a successor stands taller, looks farther, and speaks with greater clarity when God inhabits him as God inhabited his mentor.

The transition from Moses to Joshua illustrates the benefits of a long, intimate leadership journey between mentor and successor. In the next transition, seen from two very different perspectives, no such close relationship existed. Yet the proximity of a king's son to his father over time guaranteed a working knowledge of the tasks, and challenges of ruling a nation.

King David and Solomon

History and Context

The succession of Solomon to the throne of Israel is recorded in 1 Kings 1 and 1 Chronicles 28-29. However, everything about this event from the two authors' perspectives and purposes differ radically.

David's reign and Solomon's accession read very differently in 1 Chronicles compared to Samuel and Kings. For example, it is an interesting question how to harmonize the accounts of the transition from David to Solomon in Kings and Chronicles: the weak, indecisive and vengeful David of 1 King 1-2 seems far removed from the authoritative figure in 1 Chronicles 22 and 28-29 who makes preparations for Solomon's temple, instructs Solomon in his duties, and secures the people's allegiance for him.³⁰

Although these passages are primary in viewing the transition from David to Solomon, 2 Samuel 11-20 influences these events as they detail the domino effect among David's sons following his adultery with Bathsheba. Of the first three sons born to David in Hebron, the seat of his rule over Judah, two sons met their demise either through war or murder, beginning with Amnon, David's oldest. Absalom rose up in opposition to his father, declaring himself king, but he was killed in the battle between his followers and those of his father. The biblical silence surrounding the second born, Kileab, leaves Adonijah as the rightful successor. This, in turn, contributes to the intrigue of 1 Kings 1.

Solomon's Succession in Kings

The author presents an aged king of approximately seventy who is "not able to 'know' either his new concubine or the court intrigue that is taking place around him (vv.

³⁰ Bill T. Arnold and H. G. M. Williamson, eds., *Dictionary of the Old Testament: Historical Books* (Downers Grove, IL: InterVarsity Press, 2005), 201.

11, 18).”³¹ His impotence became a test of virility. “This was intolerable. The king was the symbol of his nation, its strength and fertility. Israel simply could not have an impotent king. In short, it was time to choose a replacement for David.”³² The next son in line to the throne, Adonijah, observes no move toward succession from his father so he gathers influential people around him in a banquet setting outside the city to declare his intentions to be the next king of Israel. “But he did not invite Nathan the prophet or Benaiah or the special guard or his brother Solomon” (1 Kings 1:10).

Word reaches the palace, and Nathan approaches Bathsheba, setting in motion a plan to move the king to counter the elder son’s gambit. Both players in the drama fill their roles admirably, repeating an assertion that David had earlier promised the kingdom to Solomon, although there is no independent record of that promise in Scripture. Indeed, Bathsheba’s insertion into the David narrative intrigues scholars who see her thread of influence begin even with the scheduling of her bathing episodes in Jerusalem.³³ Steven McKenzie argues:

Solomon is no doubt seen to be the replacement for the first son of David and Bathsheba who died as punishment for their sin (2 Sam 12:24-25). But the name is also pregnant with meaning in other directions. It could be taken as “Uriah’s replacement” in a continuation of the attempt to cover up the sin. Then of course, it could also be “David’s replacement.”³⁴

Suitably energized by the crisis at hand, the king rouses himself quickly, setting in motion a detailed plan to supersede and trump Adonijah. 1 Kings 1:28-37 records the

³¹ Richard D. Nelson, *The Historical Books: Interpreting Biblical Texts* (Nashville: Abingdon Press, 1998), 136.

³² Steven L. McKenzie, *King David: A Biography* (New York: Oxford, 2000), 177.

³³ McKenzie, 182.

³⁴ *Ibid.*

fulfillment of David's plans to the letter. Nathan the prophet, Zadok the priest, Benaiah the captain of the guard, and the guard themselves carry out the symbolic ride on a mule, the anointing, a trumpet sound, public declaration, and a final step of ascending to and assuming the kingship on the throne of his father. David receives well wishes while still in his bedchamber. Adonijah's party splits asunder with the rejected king rushing to grip the horns of the altar in the tabernacle. Solomon sends soldiers to retrieve his brother and bring him to the throne room where his allegiance is required upon pain of death, after which Adonijah is instructed to return to his home.

Although hurriedly performed, the actions of prophet, priest, and a military commander reflected a well-considered plan perhaps related to David's lack of such an event many years previous. Contrast that with the celebration in Jerusalem on the day of Solomon's coronation. "This is the way to welcome a king: with royal pomp, regal circumstance, and public celebration—something most people would be fortunate to witness just once in a lifetime."³⁵

In Solomon's becoming king, four separate acts comprise the ascension process. First, Solomon is placed on David's own mule for the ride to the Gihon spring where, second, the public anointing occurs.³⁶ Zadok "took the horn of oil from the sacred tent" (1 Kings 1:39) and anointed the new king. Solomon is the first of many kings to receive this anointing by prophets and priests in a public setting (2 Kings 9:6; 11:12; 23:30). The third action of ascension was the blowing of the shofar and the declaration, "Long live

³⁵ Philip Graham Ryken, *King Solomon: The Temptations of Money, Sex, and Power* (Wheaton, IL: Crossway, 2011), 22.

³⁶ Marvin A Sweeney, *I & II Kings: A Commentary*, The Old Testament Library (Louisville, KY: Westminster John Knox Press, 2007), 58. At the time, the Gihon spring was a major water source for the city. Therefore, its nature as a gathering place assured an appropriate audience for such an important event.

King Solomon” (1 Kings 1:39). The shofar, made from a ram’s horn, again adds a divine blessing to the event as the shofar announces celebrations such as the New Year (Num. 29:1), the Jubilee year (Lev. 25:9), and revelation of Torah at Mount Sinai (Exod. 19:16),³⁷ as well as other major cultural events. Finally, Solomon ascended the throne of his father. The acts of anointing and sounding a trumpet elicited such a crowd reaction that “all the people went up after him, playing flutes and rejoicing greatly, so that the ground shook with the sound” (1 Kings 1:40).

Although various elements of the ascension to the throne or coronation are symbolic of divine favor and presence, there is no direct influence from the LORD in the events of the day: no voice from within a cloud directly addressing the new king as happened in the succession of Joshua. We must wait for Solomon’s nighttime encounter with God at Gibeon for his tent of meeting commissioning by God.

A Sad Addendum

The succession process from David to Solomon lacks completion if the final instructions from father to son are withheld. In 1 Kings 2:1-4, David reiterates for his son the charge and promise he received from God many years ago. If Solomon would

Walk in his ways, and keep his decrees and commands, his laws and requirements, as written in the Law of Moses, so that you may prosper in all you do and wherever you go, and that the LORD may keep his promise to me: ‘If your descendants watch how they live, and if they walk faithfully before me with all their heart and soul, you will never fail to have a man on the throne of Israel (vv. 3-4).

However, on the heels of that private commissioning, David outlines a process of cleaning house for his son that includes justice against Joab, who supported Adonijah’s

³⁷ Sweeney, 58.

self-appointed succession, and Shimei, who cursed the king years earlier while he was forced to flee Jerusalem from Absalom. “The series of actions leading to the elimination of all possible threats to Solomon’s throne is concluded by the statement, ‘Thus was the kingdom made secure in the hand of Solomon’ (v. 46b).”³⁸

Before examining the succession of Solomon recorded in Chronicles, a reference to earlier differences noted between succession accounts in Kings and Chronicles should be noted. Under each source of this material lie vastly differing purposes. The Book of Kings, originally undivided in Hebrew, “constituted the fourth book of the Former Prophets, and according to the Talmud were composed by Jeremiah (Baba Bathra 15a). This fourth book was evidently regarded as a continuation of the third, the two books of Samuel, and the division between them which was arbitrarily executed with the intention of providing two works of approximately equal length.”³⁹ The books of Joshua, Judges, Samuel, and Kings, have been thought to reflect similar objectives regarding their concepts of covenant breaking or covenant keeping, and blessing and curses, so prevalent in the Book of Deuteronomy.⁴⁰

Solomon’s Succession in Chronicles

The unevenness of rule in King David’s latter years coupled with his final vengeful recommendations to Solomon in 1 Kings 2:5-9 do not appear in the Chronicles account. Indeed, “Chronicles portrays Solomon in a more favorable way in order to

³⁸ John Van Seters, *The Biblical Saga of King David* (Winona Lake, IN: Eisenbrauns, 2009), 340.

³⁹ Gwilym H. Jones, *1 and 2 Kings*, vol.1 of *The New Century Bible Commentary* (Grand Rapids, MI: Eerdmans, 1984), 2.

⁴⁰ Martin Noth, *The Deuteronomistic History*, 2nd ed., Journal for the Study of the Old Testament-Supplement Series 15 (Sheffield: JSOT, 1991).

present him as the suitable temple builder.”⁴¹ In 1 Kings, David is seen as old, weak, and uninformed about the activities of his kingdom. David’s bedchamber serves as the staging area for Solomon’s coronation. The king put the pieces of what he’s hearing from the prophet Nathan and Bathsheba together with actions needed, but he remains in bed, later accepting congratulations from dignitaries who hear the news. Bathsheba plays an active role in the drama, reminding the reader of the events of her first husband’s death and her adultery with the king. None of those items are included in the Chronicles account. “Chronicles retells the history of Judah in the monarchy period from the perspective of the postexilic or Second Temple era. ... Essentially the author has revised or rewritten Samuel and Kings in order to express certain theological opinions and to urge a postexilic audience to embrace these opinions and act upon them.”⁴² Admittedly, the author of Chronicles points toward a future, more formal event where David uses Solomon’s ascension as a platform for fund-raising and preparation for the temple’s construction. Indeed, it is the primary role of the temple that so concerned the postexilic authors of Chronicles.

Many scholars offer the opinion that Chronicles was part of a larger compilation of material including Ezra-Nehemiah, which would make the final verse of 2 Chronicles fit as an apt prelude to a return to build, what for most Jews was the pinnacle of their religious experience. We can assume that religious and cultural relativism posed a great threat in the immense Persian Empire to the small Jewish community in Judah. By emphasizing that, despite the smallness and insignificance of this community, their temple and temple service have been given by God himself, the Chronicler wants to give heart to this fellow people and believers and convince them that God can be found in the temple service.”⁴³

⁴¹ Martus Adinugraha Maleachi, “Historiography of Chronicles as Reflected in its Account of Solomon’s Reign” (PhD. diss., Southwest Baptist Theological Seminary, 2010), 5.

⁴² Nelson, 149.

⁴³ Peter B. Dirksen, *1 Chronicles*, Historical Commentary on the Old Testament (Leuven, Belgium: Peeters, Bondgenotenlaan, 2005), 13.

Perhaps the author of Chronicles looked back at the first temple's genesis with fond remembrance and used the material from Kings to build a carefully constructed, albeit edited version of events with a grand purpose.

The Chronicles Succession, Scene One: A Private Commission

Three passages from 1 Chronicles present a second chapter to Solomon's succession. The first appearance of the succession process is chapter 22 of 1 Chronicles, which begins with a transition comment from the previous chapter describing David's purchase of the threshing floor of Araunah as the location for the future temple. In verses 2 through 4, David gathers workers and materials for the project, making the first of two remarks that Solomon was young and inexperienced (1 Chron. 22:5; 29:1) and the project was huge. Then David relays a message to Solomon that he received from the Lord followed by a personal charge or commission to his son (22:7-13). In the charge, David asks that Solomon enjoy God's presence, experience success in building the temple and express discretion and understanding as he leads Israel. He then states a familiar refrain that weds obedience to God's law with success. He concludes with a repeated admonition to be strong and courageous.

The author of Chronicles compresses the events surrounding the numbering of the soldiers in chapter 21 and David's preparation of materials and workers in chapter 22. He also completely disposes with the painful events of Solomon's first coronation and there is no mention whatsoever of Adonijah's part in the story. Here King David exhibits a sound mind, a deep devotion to God, and great energy. The author uses this chapter as a platform for presenting the Davidic temple service and political/military hierarchy.

In chapter 22, David's remarks to his son begin with a description of the prohibition God used in disallowing David's construction of the temple. This prohibition seems hauntingly familiar to God's words to Moses, disallowing his entry to the Promised Land because of anger expressed in striking rather than speaking to the rock near the waters of Meribah: "Because you did not trust in me enough to honor me as holy in the sight of the Israelites, you will not bring this community into the land I give them" (Num. 20:12). Indeed, David's commission to Solomon (1 Chron. 22:11-13) continues the same phrasing and language of Moses and God's charge to Joshua. (See Table 2 below.) "Moses and David's failure to realize fully their intentions is counterbalanced by their successors' achievement (vv. 6-9; 28:3; Dt. 1:37-38; 31:2-3)."⁴⁴

David next quotes God's words to him that name Solomon as his successor, describe Solomon as a man of peace and rest, prescribe Solomon as the temple builder, place Solomon directly under God's oversight, and assure the Davidic lineage of kings eternal continuation. These words from God, relayed now from David to Solomon, first came through Nathan to David in 1 Chronicles 17 sometime after the ark is brought to Jerusalem and David's interest in building the temple is at its zenith. Verses 11-13 best illustrate the tight parallel between this succession and Moses and Joshua's experience recorded in Deuteronomy and Joshua.

⁴⁴Martin J. Selman, *1 Chronicles: An Introduction and Commentary*, Tyndale Old Testament Commentaries (Downers Grove, IL: InterVarsity Press, 1994), 211.

Table 2. Parallels between two successions⁴⁵

<i>I Chronicles text</i>	<i>Parallel Phrase</i>	<i>Deuteronomy text</i>	<i>Joshua text</i>
22:11	Yahweh with you	31:8	1:5, 9
22:13	Be strong	31:7	1:6-7, 9
22:13	Be of good courage	31:7	1:6-7, 9
22:13	Do not fear	31:8	1:9
22:13	Do not be dismayed	31:8	1:9

In two very different historical contexts, between two very divergent sets of leaders, almost identical exhortations compel the new leaders to meet the challenges ahead.

Qualities of leadership like strength, fearlessness, and courage combined with a commitment to God’s continued presence in their lives, sets the right foundation for any and every future endeavor.

The Chronicles Succession, Scene Two: A Public Commission

The narrative picks up again as David calls “all the officials of Israel to assemble at Jerusalem” (1 Chron. 28:1). The author describes King David rising to his feet in front of the assembled leaders and immediately identifying his reason for calling them together—construction of the temple. After reiterating God’s prohibition of his personal participation, David introduces his successor with words similar to a personal charge to Solomon recorded in chapter 22:7-13. The departure from those earlier words rests on David’s insistence that Solomon stay closely connected to God through willing devotion emerging from pure motives. David’s warning that “if you seek him, he will be found by you; but if you forsake him, he will reject you forever” (28:9b) precedes the possible reason for such strong language—the completion of the temple. Perhaps David means to

⁴⁵ Dirksen, 266.

remind his son not to allow anything to hinder the project whose very design rests upon a desire to honor the God Solomon should obey.

This very public demonstration of transition and commissioning varies greatly from the events described in 1 Kings 1. Of particular note is the presence of David's other sons and every one of the officials of David's kingdom. David's sons attended Adonijah's pre-coronation feast, which made them unavailable for Solomon's hurried ascension to the throne. In contrast, the Chronicler is careful to note the presence of all Solomon's brothers in this very public, formal event. John Van Seters makes this point in his comments:

He (the author of Chronicles) has all of the leaders of the people and all of the sons pledging allegiance to Solomon (1 Chr 23:1-2; 28:1-2; 29:22-24). He makes absolutely sure that Solomon is the divine choice that is intended in the deity's promise to David (1 Chr 22:6-18) and that David has made this clear beforehand to all the leaders of the people.⁴⁶

Another great difference between the first and second coronation events is the latter's focus on the temple. The verb, 'to build,' and the noun, 'work' often appear in both 1 Chronicles 28 and David's private commissioning in chapter 22. Interspersed in the conversation concerning the importance of the temple construction, Solomon's primary role in building it, and a command to everyone else to support Solomon in his efforts to build the temple, is a reminder to follow God's commands and encouragement to offer complete, willing devotion to God.

Chapter 29 echoes the same themes. David offers his immense treasure as a seedbed for additional riches pledged from attendees in the great feast, then he crowns the event with a prayer resembling the best of his songs of praise. The final sentence

⁴⁶ Van Seters, 337.

appears to be a coda to the successful fund-raising event with these words, “And give my son Solomon the wholehearted devotion to keep your commands, requirements and decrees and to do everything to build the palatial structure for which I have provided” (v. 19). David remembers that in order to remain on the throne, his descendants must continue their allegiance to God. Solomon’s completion of the temple will only be accomplished through his continued rule under God’s favor.

Table 3. Succession timeline from David to Solomon

<i>Event Description</i>	<i>Audience</i>	<i>Text</i>	<i>Promises, Instructions, Results</i>
Adonijah calls a feast to declare himself king	leaders and sons of David	1 Kings 1:5-10	The next in line makes his move, eliciting support.
Nathan and Bathsheba approach David	David in his bedchamber	1 Kings 1:11-27	Nathan queries the king. Bathsheba reminds David of his oath.
David arranges a hurried coronation plan	priest, prophet, and general	1 Kings 1:32-36	Zadok, Nathan, and Benaiah are given the plan.
Solomon is crowned king	crowds at Gihon	1 Kings 1:38-40	a mule ride, public anointing, and the throne is occupied
David commissions Solomon privately	Solomon	1 Chron. 22:6-13	In the midst of organizing for temple construction, David charges his son.
David calls for a feast	leaders and sons	1 Chron. 28:1	All officials gather in Jerusalem.
David publicly commissions his son	leaders and sons	1 Chron. 28-29	David pledges his treasures toward the temple and urges others to join him. Charges Solomon as his successor.
David leaves final justice instructions with Solomon	Solomon	1 Kings 2:1-9	Two men are marked for negative responses, one for positive.

Tejado Hanchell proposes an entire succession process through an examination of 1 Chronicles 28, a “prescriptive succession model labeled the Davidic model of leadership succession. The model includes seven projects or activities for senior leaders: (a) assemble leaders, (b) address leaders, (c) acknowledge leadership limitations, (d) appoint successor, (e) admonish successor, (f) assist successor, and (g) affirm successor.”⁴⁷

The final picture of Solomon’s public coronation is recorded in 1 Chronicles 29:22-23. The picture of that day varies greatly from the hurried events recorded in the

⁴⁷ Tejado W. Hanchell, “The Davidic Model of Leadership Succession: An Exegetical Study of 1 Chronicles 28” (PhD diss., Regent University, 2010), iii.

first coronation process which was planned, executed and celebrated all in one 24 hour period. The writer of the Chronicles account carefully describes the second coronation as a day of great joy in which not only the King was established but Zadok as priest.

Summary and Present Day Implications

The transition from David to Solomon is difficult to harmonize from two different passages. Therefore, the following characteristics of succession draw from both passages.

God's Choice

God gave Solomon the name "Jedidiah" (2 Sam. 12:25), which means "the LORD loves him." And although there is no record of David's promise to Bathsheba that Solomon would be the next king of Israel, that reference is made to her privately in David's bedchamber and publicly before the leaders of Israel. It is hard to imagine the chaos of Solomon's first coronation day as plans were hurriedly put in place to make him king. However, the second coronation declaration set the proper tone for honoring the man God chose as David's successor. A clear understanding of Solomon's relationship with God is reflected best in his nighttime dream encounter in which the new king asks God for wisdom to rule rather than conquests or material gain. The present day applications are fundamental. Without God's calling and choice to serve in a leadership role, the rewards of partnering with the Lord of the church are absent. The specter of a self-made calling to leadership hangs in the background of this transition as the figures of Absalom and Adonijah come to mind.

Failure to Mentor

The succession story told through the eyes of the writer of Kings casts David in a very negative light as a man who consistently ignores the need to lead his family. The disasters of Amnon's rape of his sister, Absalom's murder of Amnon, Absalom's attempt to usurp his father's kingdom, and the decision of another son, Adonijah, to ascend the throne all point to a man who abdicated his role as a father. David seems to be surrounded by friends who respect him, but his inability to lead his own children, especially his adult sons, results in catastrophic loss. Speculation about the causes for such willful disregard of the demands of fatherhood include his observation of Saul's relationships with his sons or shame over his adultery with Bathsheba. Whatever the cause, David failed to discipline, train, and otherwise engage with his sons in order to prepare them to rule. Even long-term relationships do not guarantee a leader's willingness or skills to properly mentor a replacement from within an organization.⁴⁸

Resource Provision

With all David's faults, the Chronicles account of David's succession to Solomon illustrates a leader's best attempt to ensure the new leader's success. He provided plans, material, and personnel for the construction of the temple as well as extensive leadership assignments for every level of the kingdom's organization. Indeed, Solomon receives a great gift from the outgoing leader. Just as David rallied the leaders of the kingdom to

⁴⁸ William Vanderbloemen and Warren Bird, *Next: Pastoral Succession That Works* (Grand Rapids, MI: Baker Books, 2014), 98-106. The story of Robert A. Schuller and his succession derailment at the Crystal Cathedral and their international television program, the *Hour of Power*, drips with interfamily intrigue and ultimately dissolution of a once great ministry. Sitting atop the enterprise as it slipped into chaos was a weakened, perhaps mentally challenged, elder unable to guide his family through the transition.

attend the coronation of Solomon and receive an impassioned plea to support the new king's task of building the temple, so an outgoing leader today must marshal leaders to surround and support his or her successor. Leaders should be chosen and trained for all major ministries. Financial reports should be up-to-date and historical data ready for review. Systems should be in place to support current programs. Facilities and grounds should undergo not only a cosmetic treatment, but also a deeper level of cleanliness and repair that attracts and makes useful the entire complex.

Private and Public Commissioning

In the first coronation, David is absent from the proceedings, directing the last minute preparations from the confines of his room in the palace. Yet he provides his mule and orchestrates a series of ceremonial gestures that adequately inform the general populace of Jerusalem that Solomon was now king. In the second coronation and in a private meeting with Solomon, David personally charges his son with echoes of Moses' words to Joshua, reminding him that God will be with him and that strength and courage will be needed along the way. Although the coronation shares the characteristics of a donor fund-raising event, David lifts Solomon's role as king to a proper level of distinction, calling him to complete a great work—with the people's help. Again, in present day circumstances, nothing speaks more highly for an incoming leader than the public, ceremonial support of the outgoing leader, coupled with God's mandate for the future.

Strength and Courage Commanded and God's Presence Solicited

In David's private audience with Solomon, he called his son to courage and strength and away from fear and discouragement. Although the tasks before Solomon

differed in nature from his father's world of wars and conflict, the peacetime efforts of building a structured society and literal structures throughout the country demanded courage and strength of purpose. Ironically, the need for courage in David's decades-long struggles against enemies like the Philistines surfaced in a less overt enemy within Solomon's own heart as he multiplied wives and the gods these women served. Both needed courage to address an enemy unique to their era's circumstances. David also reminded his son in private to solicit God's presence, saying "the Lord be with you" repeatedly (1 Chon. 22:11, 16). The traction of this admonition stood the test of time as a wise old king declared that remembrance of God and obedience to him was the purpose of life. After almost limitless accomplishments and pursuits, the presence of God in one's life trumped every human endeavor. This truth is also clearly apparent in the leader whose story dominates the pages of the New Testament.

Paul and Timothy

History and Context

The third relationship examined in light of succession resembles Moses and Joshua far more than David and Solomon. Paul of Tarsus and a much younger Timothy of Lystra formed a rich and lengthy partnership that resulted in not only numerous notations in the Book of Acts, but also two distinct letters that comprise a portion of the New Testament canon. G. W. Knight views this relationship as having multiple facets, including (a) spiritual paternity, i.e., Paul the evangelist and Timothy the convert (see 1 Cor. 4:14-17); (b) spiritual adoption and training, i.e., Paul the nurturer and Timothy the son who grows under his adoptive father; or (c) simply of shared faith, with Paul being

the older (the ‘Father’) in that faith and Timothy the younger.⁴⁹

The beginning of their story is recorded in Acts 16:1-3, as Luke mentions Timothy’s heritage, reputation and Paul’s decision to circumcise him. Aside from this passage, little mention of Timothy occurs in the Book of Acts (17:14-15; 18:5; 19:22; 20:4). Yet, his importance to the ministry of Paul cannot be overstated. Of the almost one hundred names mentioned in association with Paul in the Book of Acts and his letters,⁵⁰ only Timothy, Titus, and Philemon are recipients of personal letters. Additionally, Paul referred to Timothy as his son in five separate references (Phil. 2:22; 1 Tim. 1:2, 19; 2 Tim. 1:2; 2:1). And Timothy was named in the salutary greetings along with Paul in six of Paul’s thirteen epistles. Perhaps the strongest reference to the intimate nature of their relationship is found in 2 Timothy 3:10-11. “You, however, know all about my teaching, my way of life, my purpose, faith, patience, love, endurance, persecutions, sufferings— what kinds of things happened to me in Antioch, Iconium and Lystra, the persecutions I endured.” “Paul is inviting a younger believer to recall a life lived in full view. The faith is not private, nor is the idea of declaring one’s life exemplary thought odd. It seems, rather, to be expected. Paul has drawn Timothy near. The younger man has seen how the wizened apostle handled day-to-day life. He saw him respond to success and failure, abundance and poverty, sickness and health.”⁵¹

⁴⁹ G. W. Knight, *The Pastoral Epistles* (Grand Rapids, MI: Eerdmans, 1992), 63-64.

⁵⁰ Andreas J. Kostenberger and Terry L. Wilder, *Entrusted with the Gospel: Paul’s Theology in the Pastoral Epistles* (Nashville, TN: B & H Publishing, 2010), 106.

⁵¹ Phil Wagler, “Why We Need To Follow the Leader,” *Canadian Mennonite*. 18.22 (Nov 2014): 9.

This eventual depth of friendship began in Paul's recruitment of young Timothy during his second missionary journey. Timothy's good reputation was known not only in his hometown, but also in Iconium, twenty-two miles distant from Lystra. Timothy's mother and grandmother were both believers (2 Tim. 1:5) and Paul was aware of his extensive knowledge of Scripture (3:15). This combination of solid heritage, scriptural knowledge, and good reputation convinced Paul of Timothy's potential. Only one thing remained to be done before Timothy could be part of the team, circumcision. This decision seems strange on the surface because of Paul's vocal opposition to circumcision for Gentile believers, a matter which found wide agreement among the apostles and elders in Jerusalem (Acts 15:5-21). However, in Timothy's particular case, his mixed ethnicity called for a different approach, as Eckhard J. Schnabel makes clear:

Paul's loyalty to the Mosaic law expressed in Timothy's circumcision does not contradict his basic theological position regarding the salvation-historical role of the law ... but remedies the ambiguous ethnic and social status of Timothy. If his Jewish mother made him legally Jewish (matrilinear principle), Timothy was an uncircumcised Jew, a status that was untenable for Jews, constituting a violation of the covenant, and strange for Gentiles, who knew that Jews were circumcised. The belated circumcision thus becomes plausible. If his Gentile father made him legally a Gentile (patrilinear principle), his Jewish upbringing in the context of a synagogue suggests a quasi-Jewish identity in social terms, a situation that would be clarified by circumcision."⁵²

Paul's treatment of Timothy's unique situation parallels his inclusion of Silas as a member of his ministry team. In Silas, Paul chose a respected leader and prophet from the Jerusalem church, someone who aided Paul in connecting with the Jews in the synagogues he visited first in every city. The circumcision of Timothy and the choice of

⁵² Eckhard J. Schnabel, *Zondervan Exegetical Commentary on the New Testament: Acts* (Grand Rapids, MI: Zondervan, 2012), 665.

Silas for his team find definition in 1 Corinthians 9:19-23 where Paul states his ultimate goal was “to win as many as possible” (v. 19).

Paul’s Pastoral Assignments to Timothy

Just as Moses sent Joshua to fight the Amalekites and spy out the land of Canaan, so Paul sent Timothy to cities and towns the team had visited to perform various tasks in building confidence, individual and corporate maturity and preparation for proper leadership. Margaret Mitchell compares the use of Timothy and others as Paul’s envoys to common Greco-Roman conventions in the first century. For instance, “in 1 Thess 3:6-10 Timothy is sent back to Paul by the Thessalonians, and therefore brings their message of fidelity to Paul; in response Paul welcomes Timothy with joy...[and] the result of the communication from the envoy is that Paul is comforted.”⁵³ As a demonstration of such visits to other churches, the following summary of reveals Paul’s increasing confidence in Timothy as a leader in his stead.

Table 4. Pastoral assignments from Paul to Timothy

<i>City</i>	<i>Text</i>	<i>Assignments</i>
Thessalonica	1 Thess. 2:17-3:10	strengthen, encourage, and report back
Corinth	1 Cor. 4:16-17; 16:10-11	remind, affirm, and represent Paul
Philippi	Phil. 2:19-24	provide care and report back
Ephesus	1 Timothy	refute false teachers, select new leaders

In examining the assignments to the churches noted above, certain commonalities of purpose surface, deserving special note.

⁵³ Margaret M. Mitchell, “New Testament Envoys in the Context of Greco-Roman Diplomatic and Epistolary Conventions: The Example of Timothy and Titus,” *Journal of Biblical Literature* 111, no. 4 (1992): 653.

Commend his protégé

By the time Timothy joined Paul's ministry team, Paul had learned a great deal about the process of bringing the gospel to a new area. One of those lessons grew out of a missing element in Paul's first experiences, a proper introduction and commendation. Because Paul had built his reputation with each city, he now used that influence to carefully lay the groundwork for Timothy's arrival. In Thessalonica, Paul referred to Timothy as "our brother and co-worker in God's service" (1 Thess. 3:2). In the first letter to Corinthian believers, Paul writes, "my son whom I love, who is faithful in the Lord" (4:17). Just prior to verse 17, Paul reminded the Corinthians that he served as their true father in the faith and in light of that he dispatched another son whom he also loved to them to remind them of things he would say if he were present with them.

In Paul's letter to Philippi, he refers to Timothy "as a son with his father he has served with me in the work of the gospel" (Phil. 2:22). This intimacy of personal relationship is coupled once more with a shared goal of spreading the good news of Christ, activity in which Timothy has "proved himself" (v. 22). Paul Holloway examines the Apostle Paul's commendation of Timothy to the church at Philippi. "Paul describes Timothy as his 'child' (*tevknon*) in the gospel ministry—children were often seen as replacements for dead parents—and why he insists that Timothy is 'of like soul/mind' (*ijsovyucon*) to himself ... Paul offers Timothy to his anxious readers as his replacement, as another Paul or *alius Paulus*."⁵⁴ Under the looming uncertainty of imprisonment, Paul

⁵⁴ Paul A. Holloway, "Alius Paulus: Paul's Promise to Send Timothy at Philippians 2.19-24. *New Testament Studies*, 54 (2008): 556.

sets the stage for Timothy's full acceptance in every community of faith they have influenced.

Care for the people

At various points in his communication with the churches, Paul refers to himself both as father (1 Cor. 4:15; 1 Thess. 2:11) and as a mother (1 Thess. 2:7). His expressions of joy, thankfulness, and devotion to pray for the churches illustrate his profound concern for God's Church (Rom. 1:10; Phil. 1:4; Col. 1:3; 2 Thess. 1:11). This same level of care is passed onto Timothy in his visits to the churches. In Thessalonica, Timothy was to strengthen and encourage believers in their faith (1 Thess. 3:2). In Corinth, Paul couches Timothy's visit within his own status as that church's father figure, not just a guardian, and referring to them as his dear children (1 Cor. 4:14-15). To the Philippians, Paul informs the church that Timothy is unique in his care for them, indeed, that "no one else ... takes a genuine interest in your welfare" (2:20).

Report the condition of the church

The final common characteristic of Timothy's visits for Paul include a reporting process whereby Timothy brought back word of each church's overall vitality. Echoing the words of Proverbs 27:23 to "know the condition of your flocks" and the admonition of Peter who urged elders to "be shepherds over God's flock that is under your care" (1 Pet. 5:2), Paul ached to know their condition. "For this reason, when I could stand it no longer, I sent to find out about your faith. I was afraid that in some way the tempter might have tempted you and our efforts might have been useless" (1 Thess. 3:5). Timothy's careful reporting of the condition of the believers in each church he visited helped assuage the pain of such deep concern. This hunger for something other than questions or

problems drove Paul to hope that through Timothy's visit to Philippi he would "be cheered when I receive news about you" (Phil. 2:19).

Succession Mandates from Paul to Timothy

Guard the Gospel

The greatest challenge and longest ministry assignment took place in Ephesus. Paul himself spent three years there (Acts 20:31), preaching the gospel and warning the Ephesian church "night and day with tears" (v. 31). After leaving Ephesus, Paul went to Greece and Macedonia and prepared to leave for Jerusalem. Prior to setting sail, Paul called the Ephesian elders together at Miletus where he warned them about savage wolves who would come from within the church leadership to "distort the truth in order to draw away disciples after them" (v. 30). It was these leaders that Paul instructed Timothy to confront and command "not to teach false doctrines any longer nor to devote themselves to myths and endless genealogies" (1 Tim. 1:3-4). These false doctrines are contrary to Paul's "sound doctrine that conforms to the glorious gospel of the blessed God, which he entrusted to me" (1:10-11).

Indeed, the charge to guard what has been given to Paul is repeated twice in 1 Timothy. "I give you this instruction in keeping with the prophecies once made about you, so that by following them you may fight the good fight, holding on to faith and a good conscience" (1:18-19). At the end of his letter, Paul refers to this action again, "Timothy, guard what has been entrusted to your care" (6:20). Timothy's deposit is clearly the "sound words which you have heard from me" (1:13). The content of the "sound words" was "the gospel" (vv. 8, 10), to which Paul was appointed "herald and apostle and teacher" (v. 11) and which Timothy himself is also to "deposit with faithful

persons who will be able to teach others also” (2:2). That is, like Paul, Timothy is to “preach the word” (4:2) and pass it on to the next generation.⁵⁵ The currency of the gospel, placed on deposit with succeeding groups of believers, still yields salvation for all those who hear.

Paul uses several key words to describe the actions and content of what he calls Timothy to guard. The first word is command (*parangelia*). In the New International Version, this word is translated as “command” (1 Tim. 1:5) and “instruction” (v. 18).

Within Greek literature the range of meaning varies from proclamation, announcement, instruction, command, order, charge, doctrine, or teaching. In 1 Timothy it appears to be primarily the apostolic message of the gospel with its obligation to mission and, secondarily, the apostolic charge to correct false teachers who teach contrary to apostolic teaching.⁵⁶

In other Pauline works, the equivalent of *parangelia* is *paradosis*, which means “teachings” or “traditions.”⁵⁷ In 1 Corinthians 11:2 and 2 Thessalonians 2:15 and 3:6, it refers to a body of teaching delivered by the apostle with particular emphasis on the core truth of the gospel itself. It is the “deposit” mentioned in 1 Timothy 6:20, the “faith” used in 1 Timothy 3:9; 4:1, 6; 5:8; 6:10, 21, the “gospel” in 2 Timothy 1:11; and the “word of God” in 1 Timothy 4:5. This gospel is “entrusted as a deposit into Timothy’s care. He must guard this deposit by keeping it pure and unadulterated, and by using it properly.”⁵⁸

⁵⁵ Christopher Roy Hutson, “Was Timothy Timid? On the Rhetoric of Fearlessness (1 Corinthians 16:10-11) and Cowardice (2 Timothy 1:7),” *Biblical Research*, 42 (1997): 67-68.

⁵⁶ Kostenberger and Wilder, 58.

⁵⁷ Verlyn D. Verbrugge, *New International Dictionary of New Testament Theology* (Grand Rapids, MI: Zondervan, 2000), 435.

⁵⁸ Perry L. Stepp, *Leadership Succession in the World of the Pauline Circle* (Sheffield, UK: Sheffield Phoenix Press, 2005), 123.

This charge is further emphasized in 2 Timothy when Paul instructs Timothy to be a workman who “correctly handles the word of truth” (2:15) and to “continue in what you have learned and have become convinced of, because you know those from whom you learned it, and how from infancy you have known the holy Scriptures, which are able to make you wise for salvation through faith in Christ Jesus” (3:14-15). The purpose for guarding such a great deposit, the foundation stone of faith, emerges from a vital passage in Scripture describing itself—2 Timothy 3:16-17. There Paul reminds Timothy that all Scripture emanates from God himself and is useful in many ways to make ready or equip devoted men and women who follow God for every good work. Guarding the gospel must invariably lead to passing it to others.

Entrust the Gospel to Others

The word “deposit” or “entrust” (*paratheke*) appears in 2 Timothy 1:12, 14 and 2:2. Timothy is urged to guard the gospel, but also to “entrust it to reliable men” (2:2). “Leaders are all tempted to be egotistic but leaders are never an end in themselves. They are links in a chain. They need to be concerned with their succession if their work is to survive. ... He was to find the right people as elders/bishops and deacons. He was not to be too hasty in giving responsibility until people had been tried and tested.”⁵⁹ Paul also realizes the approaching inevitability of his death and the resultant drift toward heresy. In his view, the need for disseminated truth “shifts to the idea of the secure transmission of ‘the deposit’ to the next generation.”⁶⁰

⁵⁹ Tom Houston, “Biblical Models of Leadership,” *Transformation* 21, no. 4 (2004): 231.

⁶⁰ Phillip H. Towner, *The Letters to Timothy and Titus*, The New International Commentary on the New Testament (Grand Rapids, MI: Eerdmans, 2006), 55.

Timothy's task, passed on to him by succession from Paul, is to care for the gospel. This succession differs from the central successions in 1 Timothy and the implied successions in Titus, both of which involved single (albeit difficult and important) tasks. In 2 Timothy, Paul is not passing on a single task ... This is a succession of tradition, not task, built on the succession between Jesus and Paul. ... Here Timothy becomes the caretaker of Paul's message, able to apply and teach it authoritatively. He becomes the official repository of Paul's gospel, voice, teaching, and example.⁶¹

Paul rarely traveled or ministered alone. His training as a rabbi under Gamaliel likely calcified this practice in both thought and action. He was a leader, a team builder. So when he tells Timothy "the things you have heard me say in the presence of many witnesses entrust to reliable men who will also be qualified to teach others" (2:2), the assignment was clear—keep passing the baton to someone else. "Timothy, as a good servant of Christ Jesus must put these instructions before *the brothers and sisters* in Ephesus (4:6). His task includes appointing teaching *elders* (or pastors) in God's household (3:14-15) who must be above reproach, exemplary in every way (3:1-7). These *local teachers* in turn are to be commanded and taught how to spread the message of salvation for all people (4:10, 11)."⁶² The spread of the gospel was not the result of marketing, but of marinating, one person investing in another over time. Yet this transmission of truth from one to another comes at a high price.

Be Courageous

Paul is concerned in his first letter to Timothy about guarding the gospel, clearly communicating its proper applications especially to leaders. In his second letter, "the concern is not with refuting false teaching (as in 1 Timothy) but with how Paul's gospel

⁶¹ Stepp, 188-189.

⁶² Kevin Salisbury, "Paul's First Letter to Timothy: An Example of Missional Contextualization," *Colloquium* 44, no. 1 (2012): 99.

will continue with an authorized successor after Paul's death—a successor who will himself suffer for the gospel.”⁶³ Martyrdom was not far from Paul's mind as he composed this intimate letter: “the time has come for my departure” (2 Tim. 4:6). Challenges of every sort littered the path to that departure. Paul reminds Timothy of the “things [that] happened to me in Antioch, Iconium and Lystra, the persecutions I endured” (3:11). The litany of beatings, humiliations, imprisonments, and life threatening situations surely served as a backdrop to the admonishment to “fan into flame the gift of God, which is in you through the laying on of my hands. For God did not give us a spirit of timidity, but a spirit of power, of love and of self-discipline. So do not be ashamed to testify about our Lord, or ashamed of me his prisoner. But join with me in suffering for the gospel, by the power of God” (1:6-8). “Paul encouraged Timothy to adopt God's view of the shamelessness of a gospel-generated imprisonment. This meant that Timothy would need to join Paul in ‘suffering for the gospel’ (v. 8) and to see such suffering as a noble thing ... Paul challenged Timothy to choose God's message in spite of the risk to his status and safety.”⁶⁴ The willingness of Timothy to minister in Corinth, Philippi and Ephesus amid rancorous leadership, cultural chaos and confusing, dangerous doctrine bears out the results of Timothy's resolute partnering in the perils of gospel ministry.

In 2 Timothy 2:3, Paul further promotes the need for courage when he calls Timothy to endure hardship using three examples, a soldier, athlete, and farmer. Paul indicates that a soldier's life is not his own, he functions under the pleasure of his commanding officer in the same way an athlete bends to the rules of his sport. And

⁶³ Stepp, 159.

⁶⁴ Gregory S. Magee, “Paul's Response to the Shame and Pain of Imprisonment in 2 Timothy,” *Bibliotheca Sacra* 165, no. 659 (2008): 345-346.

finally, the farmer is hardworking and someone who “should be the first to receive a share of the crops” but probably does not (v. 6). The hardship of each example reflects a singular focus Timothy was to grasp—the life he will live is not his own. Timothy responded to his mentor’s example by visiting him in Rome where he might have witnessed his long-time friend’s martyrdom under Nero and where he himself was imprisoned according to Hebrews 13:3, 23. Tradition says that Timothy returned to Ephesus where he was martyred in the streets in A. D. 97.⁶⁵ Timothy’s life of ministry illustrates a pursuit of heavenly goals whose earthly benefits elude the casual observer but not his Lord.

Embody the Gospel

Courage, protection, and transmission of the gospel are all vital charges from mentor to successor, but one final warning serves notice as perhaps the most important charge of all, “present yourself to God as one approved” (2 Tim. 2:15). This passage echoes Paul’s admonition in 1 Timothy 4:12 that Timothy not allow anyone to despise his youth but instead, “set an example for the believers in speech, in conduct, in love, in faith and in purity.” “This use of the ‘example’ language that ties Timothy back to Paul, who represents Christ Jesus the son of the living God, provides the proper basis for Timothy’s youth not to be despised. He is to be honored not because of his youthful energy and accomplishment, but because he represents ultimately the living God who alone deserves

⁶⁵ Michael T. Cooper, “The Transformational Leadership of the Apostle Paul: A Contextual and Biblical Leadership for Contemporary Ministry,” *Christian Education Journal* 2, no. 1: 48-61 (2005): 58.

all ‘honor,’ ‘glory,’ and ‘power’ (1:17; 6:16).”⁶⁶ Conversely, if the messenger fails to embody the message, the impact of the message disappears.

On that basis, Paul then outlines the debits and credits of living for God. Under the debit category, Paul instructs Timothy to “avoid godless chatter” (v. 16), “turn away from wickedness” (v.19), “flee the evil desires of youth” (v. 22) and to “not quarrel” (v. 24). Creditable living includes a pursuit of “righteousness, faith, love and peace, along with those who call on the Lord out of a pure heart” (v. 22) and being “kind to everyone, able to teach, not resentful” (v. 24). Paul calls for utility for the master’s use as the goal of Timothy’s holy life (vv. 20-21). This usefulness shows itself in good works, especially the work of releasing people trapped by the devil, a process beginning with their repentance aided by instruction in the knowledge of the truth. To live a noble life consists of embracing godly characteristics and discarding ungodly characteristics. This exchange maximizes one’s impact for Christ in the world. As a conclusion to this section of charges from Paul to Timothy, the following table summarizes each charge and its’ scriptural definition and location.

Table 5. Summary of final charges to a successor

<i>Charges from 2 Timothy 4</i>	<i>Text</i>
guard the gospel – “preach the Word ... with great patience and careful instruction”	4:2-4
entrust the gospel – “do the work of an evangelist”	4:5
be courageous – “endure hardship”	4:5
embody the gospel – “keep your head in all situations”	4.5

Paul’s use of the gospel as treasure in 2 Corinthians 4:7 could be laid over these charges to Timothy who holds, dispenses, and certainly exhibits such great riches in his life and ministry.

⁶⁶ David W. Pao, “Let No One Despise Your Youth: Church and the World in the Pastoral Epistles,” *Journal of the Evangelical Theological Society* 57.4 (Dec 2014): 752.

Summary and Present Day Implications

The following characteristics of Paul's relationship to Timothy relative to succession reflect a growing similarity between the three succession stories surveyed in this paper.

God's Calling

Paul reminds his younger charge of those moments in his life when God validated Timothy's calling publicly through "a prophetic message when the body of elders laid their hands on you" (1 Tim. 4:14), and privately through "the gift of God, which is in you through the laying on of my hands" (2 Tim. 1:6). In the case of the first 'hand laying' recorded in 1 Timothy 4, "the laying on of the elders' hands is a rite of identification—it constitutes the means by which the community identifies Timothy as representative of them, and of their gospel ... while the rite from 2 Timothy has to do with a real, spiritual impartation—a genuine flow of charismatic unction from one person to another."⁶⁷ These practices still highlight such leadership recognition events around the globe. Their importance in public transition points for individuals and organizations cannot be overstated.

Paul considered Timothy to be a minister of the gospel in the same manner as himself, commending him to various churches as someone capable of teaching, modeling, and even disciplining the members. In addition, Timothy's grasp of Scripture reflected a lifelong study and immersion in passages he had "learned and have become convinced of" (3:14), Scriptures he had known "from infancy" (v. 15). Contemporary leaders should

⁶⁷ John C. Poirier, "Spirit-gifted Callings in the Pauline Corpus, Part I: The Laying on of Hands," *Journal of Biblical and Pneumatological Research* 1 (2009): 84.

have this same God-breathed calling to influence others through the Holy Spirit's inner prompting and through scripture. Leaders develop as well through the human influence of those who invest in their lives. In Timothy's case, his grandmother, his mother, and of course, Paul all exert influence in this young leader's spiritual journey, guiding, encouraging, and empowering him to learn about and follow God.

Long-term Service

Although the exact timeline of shared ministry remains difficult to fully know, Paul and Timothy lived and worked together among other members of Paul's team for several years. Paul remarked that his young charge knew his way of life, had participated in heartaches and triumphs. Timothy had worked alongside Paul, but had also worked independently of him on assignments to various cities. Undeniable trust defined their relationship. This quality, more than any other, should speak volumes to current leaders considering succession. Nothing replaces the value of a person who knows the context, habits, strengths, and weaknesses of the one he is to follow. A leader who follows someone he has known well may apply that knowledge to relationships, systems, and programs with confidence, whether change or stasis is desired.

Transfer of Authority

Paul sent Timothy to at least four cities to report, teach, train, and encourage the people in Paul's stead. In each instance, Paul commended his fellow minister to the recipients of his letter, calling him a son, a brother, and a fellow minister of the gospel. When Paul urged Timothy to pass the gospel on to faithful disciples who would in turn pass the gospel on to yet another generation of believers, the value placed upon Timothy exceeded that of an intern or understudy. Paul elevated his son in the faith to the level of

a peer, a man capable of raising up leaders on his own. When a person steps from the shadows of a mentor into a place of equal impact, the investment of time, attention, and instruction pays huge dividends. The moment of permanent transfer from an outgoing leader to his onetime apprentice is built on a repeated pattern of independent ministry performed under the umbrella of a mentor's watchful gaze. The baton passing ceremony simply functions as acknowledgement that all such assignments built a foundation for future success.

Private and Public Commissioning

The church still reads both the public and private commissioning statements of Paul toward Timothy. Six references to Timothy in the prefatory statements of various letters serve as public affirmations of the young man's ministry. Paul's commendations about Timothy also fill the role of commissioning. However, the intimate letters called 1 and 2 Timothy ring with the desires of Paul to place deeply held convictions into the soul of Timothy. The final charges in 2 Timothy 4 create a solid tapestry for the years of effectiveness Paul hoped Timothy would enjoy. The acts of laying on of hands, constant prayer, and tears shed for the young leader shout for all to hear concerning the deepest affection and lavished love of an imprisoned, impassioned leader for his son. This relationship should serve as a model for intimate, multigenerational love for both the individual leader and his future work as a minister.

Strength and Courage Commanded and God's Presence Solicited

Paul instructed Timothy to "be strong in the grace that is in Christ Jesus" (2 Tim. 2:1) and "endure hardship" (v. 3). Courage in the face of opposition and physical threats would be needed if Timothy followed the example and work of his predecessor. He asked

his young charge to join him in suffering for the gospel, to “guard it with the help of the Holy Spirit who lives in us” (1:14). Indeed, the Holy Spirit within New Testament believers serves as the dispensary for courage, boldness, and strength, a reservoir replenished through constant fillings depicted in such passages as Acts 4:31, “After they prayed, the place where they were meeting was shaken. And they were all filled with the Holy Spirit and spoke the word of God boldly.”

Conclusion

Three well-documented scriptural stories of succession formed the basis for this chapter. Certain characteristics of succession were shared between the stories, even in the face of an approximate fifteen hundred year timespan between the first relationship and the last. Although vastly different in context and relational dynamics, all three stories reveal similar fundamental factors that led to successions that work: God’s call, long-term service, private and public commissioning, boldness, and God’s presence solicited.

Each of the outgoing leaders in this chapter received miraculous calls to service from God—a burning bush, an unlikely anointing, and a blinding collapse in the middle of a path to vengeance. These experiences marked each man with indelible spiritual ink, creating a lifelong commitment to God’s assignment for them. In turn, two of the men gave their successors every opportunity to share in their own spiritual journey with God during their leadership formation journey. David’s relationship with Solomon unfortunately provides no detail regarding the sharing of spiritual life between father and son. However, even in this case, God made it clear to both mother and father that He loved this second son of their union. And when Solomon responded to God’s question in

a dream about his desired product from their relationship, God expressed pleasure at his response.

No characteristic of succession holds more promise than a shared connection with God. If a resource, quality, possession, or habit passes from one leader to another, a direct connection with the God of creation ranks higher than any other. The anointing of all three leaders in a public setting of commissioning each to service stands out as not only a ceremonial symbol of leadership transition, but it also served as an acknowledgement of God's affirmation and promise of power in each transition. The people who observed each act of anointing recognized its significance for the kingdom, but more so, the recipient and giver of the anointing intimately connected as a product of that moment. The coupling of calling and commissioning inextricably binds a leader with the one served, ensuring a higher source and purpose for future efforts.

Another shared characteristic, long-term service, again appears most clearly in the stories of Moses and Paul, although inferences can be made concerning David's relationship to Solomon simply because of proximity and family connections. Ironically, the two relationships developed outside familial bonds resulted in strong, shared experiences of leadership and independent assignments for the younger leaders. Joshua developed as a warrior and tribal leader under Moses' leadership and Timothy visited churches in a supervisory capacity under the direction of Paul. The word "apprenticeship" adequately describes the relationship developed over time between Moses and Paul and their younger counterparts. An apprentice reported daily to a superior who would then share the tools, tricks, and tips of the trade, all the while exposing the young learner to the customers they served. The goal of apprenticeship

envisioned a separate place of commerce for the learner either taking the place of his mentor or opening a location apart from his master. The benefits of succession within a single shop or trade were obvious. Customers' needs and quirks, schedules, pricing and methods became second nature for the new owner and tradesman.

In a similar manner, although each young leader in this study proceeded to forge new ground and carry out unique assignments compared to his predecessor, the base of their efforts already existed. Joshua surrounded himself with known leaders, systems of tribal organization, and the laws of God. Solomon utilized the vast network of leaders, systems, and resources provided by his father. And, Timothy carried letters of commendation from his mentor, enjoying the capital of Paul's expansive relational network in the churches around the Mediterranean.

Finally, boldness and courage, coupled with God's enduring presence appears in each transition story. Although the work of each protégé differed vastly in scope and responsibilities, the need for courage emanating from God's companionship remained constant. Whether the task was military, civil, or spiritual, the journey ahead required resources beyond the inherent qualities of each individual. Tapping the eternal, tailored, inexhaustible resources of the Creator shaped to the requirements of each person and task still remains the greatest privilege and necessity of every believer—every leader.

Each man's assignment differed markedly from his predecessors', reflecting unique qualities of personality, talents, and skills necessary for completing new objectives. God used each new leader to advance the kingdom each served. This advancement displayed the benefits of leadership succession that works, succession based

on God's calling and commissioning, long-term relationships, courage, and empowerment of a new generation awash in the constant presence of God.

CHAPTER 3: GENERAL LITERATURE REVIEW

Introduction

Leadership succession describes various processes of transition depending on the context. From ancient times, family, tribal, and national succession passed largely from father to son. City-states and regional kingdoms reflected this same pattern, although sometimes coups and assassinations violently shifted the reign of a king or dictator to someone completely unrelated to his or her predecessor. Royal succession by birth continues in certain monarchies today.

In contemporary settings within the United States, succession can be seen in the assumption of the role of president by five vice presidents between 1901 and 1974. These positions were declared vacant either by death or resignation. Such vacancies are filled by design through laws of succession written into the code of law in 1792, which were modified through two constitutional amendments and a 1947 law.¹

Apostolic succession, dogma “central to Roman Catholic, Eastern Orthodox and Anglican communions, draws the line of ecclesiastical authority from bishops of the church directly from the apostles of Jesus Christ.”² Although not germane to the overall focus of this project, the literature regarding apostolic succession is vast. The governance systems that support such transitions perhaps deserve a closer inspection from the

¹ Samuel R. Chand and Dale C. Bronner, *Planning Your Succession* (Highland Park, IL: Mall Publishing, 2007), 3.

² David L. McKenna, *The Succession Principle* (Eugene, OR: Cascade Books, 2015), 6.

evangelical world especially in light of the historical precedents tucked away in the practice of earlier Protestant leadership.

Perhaps the greatest examination of succession has emerged in the corporate world through studies and research emerging from the rise of the corporation in the 1950s and 1960s. The growing complexity of size and organizational scope demanded a more systematic way to capture information about individuals concerning their performance, their potential to progress, and their readiness to take on greater responsibility. The roots of such examination came from two primary sources. The first emerged from the observations of a managing director of a large coal mine in France, Henri Fayol, who developed general management principles for effective organizations. His principles reflected the conviction “that all employees should have a chance to prosper and that talented employees could climb from the lowest rung to the highest levels of the organization.”³ The second primary source of organizational theory was Frank Taylor, whose book *Principles of Scientific Management*⁴ was set in the final days of the industrial revolution. “His conception of the organization was that of a machine. His model involved managers analyzing data and planning the work accordingly, while still treating workers in a humane fashion.”⁵

Current business literature regarding succession features studies for family business, corporate CEO selection, leadership development, leadership pipelines,

³ Chand and Bronner, 5.

⁴ Frederick W. Taylor, *The Principles of Scientific Management* (New York: Harper & Brothers, 1911).

⁵ Daniel C. Russell, “A Family Systems Understanding of Transition: Leadership Succession in a Faith Based Organization” (D.Min. proj., Carey Theological College, 2009), 83.

competency guidelines, and systems designed to bring all these topics together under the rubric of succession planning and management. Various vocational disciplines, such as nursing, hospital administration, public school principals, and college and university presidents, all enjoy leadership succession studies and recommendations in professional journals, periodicals, and books. One of those vocational subsets for which leadership succession has received increasing attention is church pastoral succession.

This chapter examines the extensive breadth of material generated by social, economic, business, and academic theorists concerning leadership succession in corporate and family businesses. Best practices, resistance factors, implementation plans, and systems of leadership development will be reviewed with an eye to possible adaptation and application to church leadership succession. The limited number of books and publications regarding pastoral transition will be noted and reviewed, followed by a brief discussion of next stage books and materials. Because this study focuses not only on church leadership transitions but also succession issues for senior leaders nearing retirement age, the choices of a newly retired or repurposed leader must at least be noted.

Finally, this chapter includes a brief review of studies on change and change management directly related to the choices and decisions necessitated by huge leadership and organizational shifts. This review will conclude with a nod to leadership coaching, an increasingly popular change agent utilized by leaders in every vocation.

Organizations in America face a huge generational challenge in the coming years, as approximately “60 million baby boomers will leave the United States work force during the next 15 years. That could mean severe manpower shortages and senior

leadership gaps for unprepared companies.”⁶ Not only will pending retirements create a leadership vacuum, but “the increasing value of intellectual capital and knowledge management ... [make it more] necessary than ever for organizations to plan for leadership continuity and employee achievement at all levels.”⁷

Denominational leaders are forecasting a similar crisis in leadership transition in local churches across the nation. Jim Bradford, the General Secretary of the Assemblies of God, noted the importance of dealing with succession now. “With our active ordained ministers having a median age of around 57, we are headed into a huge leadership turnover in the next 10 to 15 years.”⁸ It is hoped that by examining current succession best practices, combined with applying effective change mechanisms, a new wave of leaders may be ushered into healthy, expectant congregational opportunities.

Corporate and Family Business Succession

Corporate Models and Church Structure

The policies, polity, and practices of a local church can reflect a variety of corporate models. For instance, larger corporations function under the guidance of a chief executive officer (CEO) who in many cases handpicks a board of directors, often CEOs in their own right. The CEO leads day-to-day operations and is the face of the company. The board of directors meets periodically throughout the year to give oversight and

⁶ Jamie McClintock, “Leadership Development Crisis Looms as Boomers Retire, Firm Reports,” *San Gabriel Valley Tribune*, July 17, 2003, accessed August 17, 2015, <http://web.b.ebscohost.com/ehost/detail/detail?vid=3&sid=5d8a2c6d-4412-4a0d-b186-8774b6510951%40sessionmgr120&hid=125&bdata=JnNpdGU9ZWhvc3QtbGl2ZQ%3d%3d#AN=2W64210942233&db=nfh>

⁷ William J. Rothwell, *Effective Leadership Succession*, 3rd ed. (New York: AMACOM, 2005), xx.

⁸ James T. Bradford, e-mail message to author, August 13, 2015.

counsel to the overall health and direction of the business. If the company is publicly held, both the CEO and board are careful to make decisions that will benefit the corporation's shareholders and stakeholders—a group that often includes the corporate officers themselves. Many local churches that are self-governing feature aspects of this model—a high level governing board led by a senior leader who is the president of the corporation and gives leadership to staffing, mission fulfillment and daily operations. Together, pastor and board make decisions that enhance the lives of the members (stakeholders). The most obvious difference between this model in a business setting and ministry setting is the relationship of the board of directors to the organization. In most corporate settings, the directors do not function as part of the organization. In a church setting, the board members are often intimately involved in several facets of the ministry. Megachurch pastors would most resemble the CEO of a larger corporation.

Some churches could be classified as a profit center of a franchise of a larger corporation. The leadership responsible for setting management in place exists in an entirely separate location where central functions such as financial management, property acquisition, and executive leadership are housed. The local church in this case has little direction setting capability, yet enjoys the overall covering and branding of the larger entity. The senior leader is rotated through the church (business) based on performance or need. The Episcopal Church-U.S.A (ECUSA) is an example of such a structure.⁹

In other cases, a church might reflect the structure of a family business, dominated by one or more generations of a founder's family. Each member of the family

⁹ David F. Lescalleet, "Transition: Developing a Theology of Pastoral Succession" (D.Min. proj., Knox Theological Seminary, 2013), 1949, Kindle.

carries a unique leadership responsibility and together they shape the direction and priorities of the family. Many smaller churches fall into this definition of structure and practice. The problem inherent in these situations is the senior leader is not a member of the family. He or she is brought into the organization and asked to lead both family and nonfamily members for the benefit of the community at large, an almost impossible dance to maintain.

A non-profit corporation shares one primary characteristic with the polity and practices of a local church in that it is mission driven, not profit focused. It also includes both a board of directors and an executive director (CEO). However, the organizational charts of most non-profits place the board of directors above the executive director who in most cases is responsible for day-to-day operations and overall mission achievement. This lesser role reflects, in part, the positioning of many pastors who are placed in their ministries by a covering organization. Yet unlike the executive director of a non-profit, most pastors function as first among equals in their local setting. Because of the secondary role of most executive directors, this chapter will not review the literature that speaks to succession in non-profits.

Regardless of the structure of an organization, every leader is an interim leader. “In all organizations the challenges and opportunities inherent in the need to replace current executives is continuous, for leaders are mortal. The question is how to manage the succession process in a way that yields optimal outcomes for both the individuals involved and the organizations in which they work.”¹⁰ The balance of this section

¹⁰ Stewart D. Friedman, *Leadership Succession* (New Brunswick, NJ: Transaction Publishers, 2011), xi.

examines the contributions of research and practices of corporate and family business leadership succession.

Corporate CEO Succession

In the spring of 1996, Rob Brown, then U.S. Secretary of Commerce, invited the CEO of construction giant Foster Wheeler to fly to Bosnia on a trade mission along with other key leaders from other U.S. companies. As the plane flew through a mountainous region of Bosnia, it met with tragedy, crashing to the ground, killing twelve senior leaders of major corporations in one moment.¹¹ In one single act, companies in California, Texas, Florida, Michigan, Chicago, Washington, DC, and New England lost their top executives. Some companies were prepared for such an emergency, immediately putting into motion an interim or replacement leader. But others admitted they were completely unprepared for what many term “the beer truck test.” “Don’t they know that the beer truck can come hurtling toward you at any time, at any speed, without warning, in the form of so many factors from health issues to ethical lapses to criminal behavior to subpar performance to ... you know the drill.”¹²

A sudden loss of the senior leader can happen in every organization. When it does, it often sets in motion a long, laborious process led by board members and directors “that have neither the time nor the expertise to do the job well.”¹³ The need for immediate action presses hard on one side while the need for an incredible amount of information

¹¹ Rothwell, 67.

¹² Noel M. Tichy, *Succession* (New York: Portfolio/Penguin, 2014), 189.

¹³ Margarethe Wiersema, “Holes at the Top,” *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 25.

regarding tasks, current projects, staffing, and a host of other information locked up in the mind of the exiting leader presses even harder on the other. This crisis-induced state is called *interregnum*, literally, “the time between kings ... (a phrase referring) to the chaos and conflict that inevitably erupts between the rules of successive monarchs. This has long been a time of danger and risk, typically prompted by succession struggles and ambiguity regarding the legitimacy of various claimants to the throne.”¹⁴

Noel Tichy says in his book *Succession* that leaders matter and continuity of leaders matter.¹⁵ Others disagree with this leadership-centric approach, stating that such statements reflect America’s overwhelming belief in individualism and “discounts the influence of social, economic, and political forces in human affairs so that accounts of complicated events such as wars and economic cycles reduce the forces behind them to personifications.”¹⁶ Although such factors certainly impact the reality of every organization, at the head of most human endeavors, whether tribal, familial, or corporate, sits a leader who guides, creates, or maintains culture and makes decisions for those around him or her. David Clutterbuck says leadership is “having the right conversations, at the right time, with the right people to make things happen.”¹⁷ This study reflects the bias that leadership and its continuity do indeed matter. The proliferation of materials related to leadership in general and succession in particular seems to support that premise.

¹⁴ Tichy, 21.

¹⁵ Ibid., 20.

¹⁶ Rakesh Khurana, *Searching for a Corporate Savior* (Princeton, NJ: Princeton University Press, 2002), 23.

¹⁷ David Clutterbuck, *The Talent Wave* (Philadelphia: Kogan Page, 2012), 59.

History, Definition, and Current State of CEO Succession

The formal study of leadership succession has its roots in the not too distant past. “The sense of succession planning as a structured process encompassing leadership at multiple layers in organizations probably began with the British Army and Civil Service in the 19th century.”¹⁸ As the sheer number and size of corporations grew, so did the imperative of leadership stability. The tremendous technological advances of the twentieth century and the emerging globalization of businesses of all shapes and sizes, coupled with the tremendous speed of change in every social, cultural, and economic sector underscores the enormous need for prepared leaders at all levels of an organization. Older paradigms have broken down. Employees rarely expect to remain in their companies for their entire career. What worked in larger, hierarchical corporate structures of the past no longer works today. Tim Casserley and Bill Critchley compare what they describe as these old and new paradigms of leadership.

Table 6. Old versus new paradigms of leadership¹⁹

<i>Old Paradigms</i>	<i>New Paradigms</i>
Concern with performance	Concern with human sustainability as prerequisite for performance
Identify skills or competencies	Foster and integrate core individual processes of reflection on action, psychological intelligence, and physiological well-being
Modify leaders’ behaviors based on those competencies	Negotiate agreement between core processes and culture of organization
Leadership is drilled into people via off-job training	Leadership emerges from reflection on action in dealing with real-life adversity

If leadership is vital to the success and longevity of an organization, leadership succession is the mechanism to not only identify good leaders, but also to implement a system to develop such leaders internally. Succession planning has been defined in

¹⁸ Clutterbuck, 7.

¹⁹ Ibid., 56.

various ways. Rothwell sees it as “the process that helps ensure the stability of tenure of personnel ... that helps ensure the continued effective performance of an organization ... by making provision for the development, replacement, and strategic application of key people over time.”²⁰ Andrew Garman and Jeremy Glawe define it as “a structured process involving the identification and preparation of a potential successor to assume a new role.”²¹ David Clutterbuck describes it as “a dynamic process of aligning employee aspirations and talents with the constantly evolving needs of the organization and of providing employees with the resources and support they need to grow into new roles.”²² Succession is not simply replacement planning when the wheels come off, a mad scramble through a list of resumes gathered from the highly selective list of people known by board members and a few other leaders. Neither is succession planning sifting through a massive list created by digital search engines followed by inadequate vetting and little concern for fit. Instead, “the central goal in transitioning leadership is ensuring that the transfer of knowledge, responsibilities, and relationships are accomplished without interrupting the focus and momentum of the organization.”²³

It is clear from published research findings that although succession is critically important, its design and implementation is not widely practiced. And when it is, the results are often ruinous. Ram Charan writes,

²⁰ Rothwell, 5.

²¹ Andrew Garman and Jeremy Glawe, “Succession Planning,” *Consulting Psychology Journal: Practice and Research* 56, no. 2 (Spring 2004): 119.

²² Clutterbuck, 11.

²³ Thomas J. Saporito and Paul Winum, *Inside CEO Succession* (Mississauga, ON: John Wiley and Sons Canada, 2012), 202.

The CEO Succession process is broken. Many companies have no meaningful succession plans and few of the ones that do are happy with them. CEO tenure is shrinking, in fact, two out of five CEO's fail in their first 18 months. It isn't just that more CEO's are being replaced; it's that they're being replaced badly. The problems extend to every aspect of CEO succession: internal development programs, board supervision, and outside recruitment.²⁴

In three separate surveys, one conducted by a conference board of general counsels, another by an executive search firm, and a third by the National Association of Directors, the results reflected the above observations. One study found that 61 percent of companies surveyed had no formal succession plan in place. Another study found 67 percent had no succession planning or leadership development process in place and the third recorded that only 35 percent disclosed the existence of an existing plan.²⁵ Blame is widespread, but in many cases “the wrong leader is placed in the wrong position for the wrong reasons or (the organization) did not attend to the necessary integration issues that should precede and follow the most important transitional event in a company's life.”²⁶ Failure in succession comes from four sources according to Ram Charan: selecting the wrong person, leaving poor performers in the job too long, not listening to or seeking feedback, and defining jobs poorly.²⁷

²⁴ Ram Charan, “Ending the CEO Succession Crisis,” *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 125.

²⁵ Tichy, 30.

²⁶ Saporito and Winum, 24.

²⁷ Ram Charan, Stephen Drotter, and James Noel, *The Leadership Pipeline*, 2nd ed. (San Francisco: Jossey-Bass, 2011), 230.

The Corporate Succession Planning Process

Corporations that do not develop a process for succession, or have one but do not use it properly, perhaps use one or more of the following succession processes instead.

The test tube succession process: “put a manager in a test tube, turn up the heat, and see what you get. If you don’t get what you want, get another manager, and heat up another test tube.”²⁸ The blindfold parking succession process: “you back into a space until you hit the car behind you, then you go forward until you hit the car in front of you, and you repeat the process until you’re close enough to the curb. Each candidate and the company suffer grave damage.”²⁹ The horse race succession process: “in the months running up to succession, the business starts sniffing out the horses capable of entering the race. They (current management) handicap the contenders and watch them perform and at some point, publicize the winner and so-called losers—at which point keeping the losers in a company becomes a real problem.”³⁰ None of these ad hoc procedures succeeds at succession precisely because of the lack of thoughtful planning designed to match a properly trained successor with a vacant position fitted uniquely to him.

“The literature on CEO succession planning is nearly unanimous in its advice: Begin early, look first inside your company for exceptional talent, see that candidates gain experience in all aspects of the business, help them develop the skills they’ll need in the top job.”³¹ Although the process varies little in its overall arch, each step is fraught

²⁸ Joseph L. Bower, *The CEO Within* (Boston: Harvard Business School Press, 2007), 111.

²⁹ *Ibid.*, 84.

³⁰ *Ibid.*, 127.

³¹ Kenneth W. Freeman, “The CEO’s Real Legacy,” *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 2.

with difficulty and layers of challenge. Simply having a conversation about succession with a sitting CEO becomes highly awkward, especially for a handpicked directorate already faced with a packed agenda each time they meet. Additionally, the CEO is often a strong-willed, performance-driven individual who is reluctant to open the door to discussions about his or her successor. Finally, the task of developing leadership becomes a recipe for perceived exhaustion of human and financial capital on a decidedly inward focused process. However, Frank Doyle, former executive VP of General Electric, disagrees with this perspective.

I think that companies with succession/development cultures run better. It's not just about picking a new leader. The act of creating a mentality of development within a company makes for more effective operations even before the change takes place. People function better in a developmental mode In my mind, it's about looking at someone on the succession ladder, evaluating his or her development needs, and doing something about them as early as possible.³²

Boeing CEO James McNerney says, "Every question about leadership ultimately comes down to development ... it's about creating crucible experiences that make others better."³³ In fact, McNerney states that the greatest responsibility of any CEO is to grow what he calls "transformational leaders."³⁴ From this perspective, the person in the top job views the development of others as his responsibility—as should the board of directors, "the one body that is in the best position to safeguard the continuity of the corporation by ensuring its sound leadership."³⁵

³² Dennis C. Carey and Dayton Ogden, *CEO Succession* (New York: Oxford University Press, 2000), 63.

³³ Tichy, 333.

³⁴ Ibid.

³⁵ Saporito and Winum, 73.

Ideally, “a CEO transition involves far more than the transfer of power and responsibility from one CEO to the next. It is rather a systematic, pivotal inflection point in the history of the organization that involves three interrelated domains including the *individual*, the *organization*, and the *senior management team*—each requiring a thorough, well planned, and integrated approach ... with the intent of ensuring business continuity and organizational success.”³⁶

Quite unlike a harried, knee jerk reaction to tragedy or crisis, a succession plan puts into motion a sustainable, interactive, living system of information sharing, multilevel conversations, organizational and individual assessment, and needs identification that serve as the life of the business. The pressures of daily operations, sales objectives, endless meetings, and financial deadlines push reflection and long-term preparations aside, bowing to the tyranny of the urgent. A carefully crafted plan of succession precludes ill-prepared, poorly researched leadership decision making. In order to better understand the finer grain components of a succession plan, the following chart blends suggestions from a variety of sources to form a comprehensive list and descriptors of succession best practices.

Table 7. A blended list of best practices with descriptors³⁷

<i>Best Practice</i>	<i>Descriptor</i>
ASSESS	Determine the current viability and descriptions of each leadership position
ASSIGN	Match both general and specific competencies to those positions
IDENTIFY	Find high performing, high capacity candidates by using consistent, objective criteria
DIAGNOSE	Assess each candidate’s strengths and weaknesses compared to the org.’s needs
PRESCRIBE	Design individual development plans for each candidate to narrow competency gaps
ENGAGE	Provide coaching, varied tasks/roles, and training opportunities to close gaps
MONITOR	Measure progress through interviews, 360’s, performance criteria, and self reports

Seen from a closer perspective, the succession process is comprised of three elements:

...succession processes, capabilities, and tools. Succession processes include the definitions, policies, and process steps needed to analyze bench strength, identify successors, and measure progress. Capabilities refer to the competencies required

³⁶ Saporito and Winum, 182.

³⁷ Rothwell, 31-32.

by management and HR to carry out the processes of succession management. Tools are the specific assessments used to isolate and calibrate performance, potential, and readiness.³⁸

A discussion of competencies and their uses are upcoming, however, the various observation and feedback instruments available to management fall outside the purview of this project.

Competencies and Values

Central to any plan is a set of standards against which potential leaders are compared. These standards or competencies help an organization describe expectations in concrete terms in order to provide common ground for evaluation for all parties.

However, in light of leadership scandals at every level of society and business,

organizations today need both competencies and values. It is just not enough to make people good performers. They must be ethical as well and possess a moral dimension that is consistent with the image the organization wishes to purvey. Lacking values, high potentials cannot be successful in the long term and cannot bring credit to the organization.³⁹

One author offered an acronym to help organizations help frame the overall range of desired competencies: T.A.S.K.—Talents, Aptitudes, Skills, and Knowledge.⁴⁰ Talents are innate abilities that someone performs naturally and easily. Aptitudes are also natural talents but require further development and training to completely flourish. Skills are learned behaviors developed over time with experience. Knowledge is information needed to perform a task or job effectively. The match between the competencies of a

³⁸ John Mattone, *Powerful Succession Planning* (AMACOM, 2013), 166-169, Kindle.

³⁹ *Ibid.*, 91.

⁴⁰ Arnie Dahlke, *Business Succession for Dummies* (Hoboken, NJ: John Wiley and Sons, 2012), 130.

potential employee or leader and the competencies required for success in a particular job or task describes the primary role of every business manager. In the case of a board's search for a CEO, the importance of a close match at that level of the organization becomes its highest priority.

Other general competencies that are essential to potential leaders include integrity and honesty, interpersonal skills, oral and written communications, results orientation, business and financial acumen, technical knowledge, team builder, and change agent.⁴¹ Not every position will require each of these competencies at the same intensity level, but an effective leader possesses a measure of each of these components. "In a recent global study of 1,140 companies in 89 countries, the top five traits companies state they most value in their CEOs include strategic thinking, execution, decision making, technical competence, and teamwork."⁴² Other innate or acquired competencies might include learning pace, adaptability and flexibility, engagement, self-confidence, credibility, influence, conceptual thinking, knowledge transfer, empowerment, and respect.⁴³ To this list, Noel Tichy adds the need for candidates to

internalize knowledge in four areas: *self knowledge*, awareness of one's personal values, goals, and aspirations, *social network knowledge*, understanding of the personalities, skills, and judgment track records of those on your team, *organizational knowledge*, knowing how people in the organization will respond, adapt, and execute, and *contextual knowledge*, understanding based on relationships and interactions with stakeholders such as customers, suppliers, government, investors, competitors, or interest groups that may impact the outcome of a judgment.⁴⁴

⁴¹ Wanda Pina-Ramirez and Norma Davila, *Passing the Torch* (Alexandria, VA: ATD Press, 2015), 74.

⁴² Saporito and Winum, 132.

⁴³ Ramirez and Davila, 122.

⁴⁴ Tichy, 60.

The judgment Tichy refers to forms an important set of criteria in his writings. He notes three domains of judgment by which leaders can be assessed: “judgments about people, strategy, and those arrived at in periods of crisis (unexpected moments). Only with the right people on board can a leader set the right strategy, which in turn provides a guideline for decision making during the inevitable crises all leaders face.”⁴⁵

There is yet another category of judgment Tichy fails to mention that causes many leaders to stumble, often fatally—judgment about themselves. Character gaps such as “arrogance, self-indulgence, inflexibility, or a command and control style of leadership”⁴⁶ routinely blunt a leader’s effectiveness, curtailing any continued ability to assure employees or management’s trust and inspiration. Investor Warren Buffett blends his hiring criteria, his competency list to three categories of characteristics: “1) Intelligence, 2) Energy, and 3) Integrity. His fundamental belief is that if a person has two of these, the lack of the third can kill a business.”⁴⁷

Low integrity, high energy and high intelligence and you have a smart, fast moving thief. Low energy, high intelligence and integrity and you have a shopkeeper, not an engine of growth. Low intelligence, high energy and integrity and you have a strong functionary, but not a great problem solver or visionary.⁴⁸

Buffett contends that all three characteristics in equal measure form the definition of a high potential, high capacity leader.

⁴⁵ Tichy, 54.

⁴⁶ Saporito and Winum, 132.

⁴⁷ David Franzetta and Moss A. Jackson, *Changing Places* (Bloomington, IN: AuthorHouse, 2012), 64.

⁴⁸ *Ibid.*, 65.

A growing sense of conviction among observers of developing leaders is that individual competencies must be coupled with appraisals arising from team contribution in order for an accurate assessment of one's performance and potential. "As roles within organizations become increasingly interconnected, it becomes more and more difficult to separate out individual performance from the performance of the formal or informal teams in which people work."⁴⁹ Because leaders will have staff, direct reports, and peers their entire career, the ability to work in harmony with a team while leading with informed conviction and confidence must be clearly in evidence.

The Importance of Leadership Development

Implicit in a discussion of competencies and the resultant leadership development plan designed to build these competencies into future leaders is a bias toward internal candidates rather than external candidates. Although a blended list of desired competencies can be laid over an outside candidate's interviews, references, and observations, the advantage of direct, in depth observation over time offers far more clarity for evaluation. The following material presupposes an in-house development process. The overall goal of such a process is the creation and maintenance of leaders ready to step into roles that represent a forward step in their careers. This group of future leaders is variously called a bench, a pool, or a pipeline.

Whatever the title, the goal is the same "because the key bottleneck to growth is so often the quantity and quality of leadership available in the organization. People learn to lead on the job. Managers who have made a real commitment to individual leadership development give their employees a clear sense of their own

⁴⁹ Clutterbuck, 84.

potential in the organization, review how they are operating and stretching week to week, and help them develop plans for reaching farther.”⁵⁰

In that light, such a process of developing leaders begins with an understanding of the passages they move through, a concept espoused by Charan, Trotter, and Noel in their book, *The Leadership Pipeline*. The book describes six leadership passages that begin with the management of self and proceed through the management of increasingly larger, more complex organizational structures until they are leaders of far-flung enterprises. The most critical stage for every leader is the art of managing oneself. It is here that a person’s

learning involves planning, (so that work is completed on time), punctuality, content, quality, and reliability. The work values to be developed include acceptance of the company culture and adopting of professional standards. When people become skilled individual contributors who produce good results—especially when they demonstrate an ability to collaborate with others—they usually receive additional responsibilities.⁵¹

If people show themselves to be effective in managing themselves, they are often promoted to the first passage, the movement from managing oneself to managing others. At this level, the lessons learned “include planning work, filling jobs, assigning work, motivating, coaching, and measuring the work of others They must shift from ‘doing’ work to getting work done through others.”⁵²

As leaders grow and assignments grow with them, the passages present unique challenges of complexity and the need for further learning and adjustment. Central to the leadership development plan of a succession management system is the opportunity for

⁵⁰ Ronald Heifetz, Alexander Grashow, and Marty Linsky, *The Practice of Adaptive Leadership* (Boston: Harvard Business Press, 2009), 170.

⁵¹ Charan, Trotter, and Noel, 17.

⁵² Ibid.

observation, training, coaching, and assessing over time. Such close examination often emerges from the creation of an individual development plan (IDP). “Developing an IDP usually requires a systematic comparison of the individual’s present abilities (as indicated by competency requirements, work activities appearing on job descriptions, and current performance as measured by performance appraisals) and future capabilities (as revealed through individual potential assessment.”⁵³ The results of one’s IDP drive his or her unique leadership development program whose overall goal is to “close the gap between present work requirements and future work requirements/potential.”⁵⁴

Leadership development plans generally mix off-site and on-site learning, featuring both team and individual based venues. Opportunities for growth might include formal degree programs in colleges and universities, seminars sponsored by vendors or universities, planned and unplanned on-the-job training, mentoring and coaching relationships, stretch assignments, and job rotation programs. These and other components build a superstructure upon which a future leader builds strength in the needed competencies for future assignments. Another way to look at a leadership development plan appears below.

⁵³ Rothwell, 235.

⁵⁴ Ibid., 236.

Table 8. Alternative strategies for leadership development⁵⁵

<i>Who-Based Strategies</i>	Pair up leaders with individuals who have special talents worthy of emulation
<i>What-Based Strategies</i>	Give leaders exposure to specific types of experiences that require desired functions/skills
<i>When-Based Strategies</i>	Give leaders exposure to time pressure in task assignments
<i>Where-Based Strategies</i>	Give leaders exposure to special locations or cultures that broaden perspective
<i>Why-Based Strategies</i>	Give leaders exposure to mission-driven change efforts
<i>How-Based Strategies</i>	Furnish leaders with in depth knowledge of their specific growth arenas

Insiders vs. Outsiders

Based on the benefits of knowing internal candidates over time and assisting them to close the gaps between weaknesses and needed competencies, one might question the value of considering external candidates. Should an organization choose leaders who are insiders, those who have come up through the ranks of an organization, or outsiders, people chosen from another agency or organization? The relative value of insiders vs. outsiders is described below.

Both insider and outsider CEO's have strengths and weaknesses when they begin. Insiders know the company and its people but are often blind to the need for radical change—they've drunk the Kool-Aid. Outsiders see the need for a new approach but can't foster change because they don't know the company or industry sector well enough. What organizations need, then, is to find a way to nurture what I call *inside-outsiders*—that is, internal candidates who have outside perspective.⁵⁶

Directors often have a difficult time choosing between internal candidates whom they have a great deal of information about and familiarity with but can seem somewhat tainted and outsiders whom at times appear overly idealized. Laying the probable

⁵⁵ Rothwell, 244, 250-251.

⁵⁶ Joseph L. Bower, "Solve the Succession Crisis by Growing Inside-Outside Leaders," *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 155.

agendas of transitions for an insider and outsider side by side would create increased clarity for those responsible for the decision.

Table 9. Transition agendas between insiders and outsiders⁵⁷

<i>An Insiders Transition</i>	<i>An Outsiders Transition</i>
Learn about parts of the business that years near the top did not provide	Learn about the people
Develop a clear understanding of the corporate-level finances	Learn about the finances
Learn about the management of key constituencies, e.g., the board, sources of finance, etc.	Learn about the business
Establish him- or herself as the company's leader	
Develop an agenda that incorporates key judgments about what is urgent and what can gather dust	Develop an agenda that introduces oneself to the organization

A leadership process as described in *The Leadership Pipeline* assumes the ability to nurture, train, and observe people over time. However, “if they (an outsider) haven’t been assessed within the framework of the Leadership Pipeline model, it’s impossible to know whether they’re ready for this leadership challenge It’s unlikely that they can deliver exceptional performance at this level.”⁵⁸ Perhaps this disconnect from an organization’s root structure and culture has led to an ever increasing failure rate of CEOs. “During the period 2000 to 2010, external hires resulted in almost twice the CEO failure rate when compared to inside successors.”⁵⁹

Joseph Bower, in his book *The CEO Within*, coined the term “Inside Outsiders” to describe a blend of qualities within a leader that reflects both realities. Schein calls these blended leaders “hybrids ... members of the old culture who best represent the new

⁵⁷ Bower, *The CEO Within*, 157.

⁵⁸ Charan, Trotter, and Noel, 205.

⁵⁹ Saporito and Winum, 115.

assumptions that they want to enhance.”⁶⁰ Bower says, “The best leaders are people from inside the company who somehow have maintained enough detachment from the local traditions, ideology, and shibboleths that they have retained the objectivity of an outsider.”⁶¹

Finally, Noel Tichy weighs in with a forceful defense of insider CEO selection.

The insider knows the company, knows the industry, knows the people, knows the networks, knows the subtle and shifting alliances, knows the existing strategy and—for better or worse, knows where many of the existing flaws and faults lie and where all the skeletons are buried and where the dirt has been carefully swept under the rug. Most important, to employ another common but useful cliché, the insider is likely to be more sensitive to the cost of throwing the baby out with the bath water.⁶²

In the final analysis, outsider “selections and recruitments are riskier, costlier, and far more disruptive to the fabric of the organization than insider selections.”⁶³

The Apprenticeship Model

In 2008, Ram Charan, world renowned business adviser, prolific writer, and teacher, authored a book titled, *Leaders At All Levels*, subtitled, *Deepening Your Talent Pool to Solve the Succession Crisis*. The premise of the book captures many of the items mentioned in this study as critical components of a successful replacement plan and management system for succession. He calls his model apprenticeship.

Apprentices are people who learn from doing and that is precisely what the Apprenticeship Model provides: practice, feedback, corrections, and more practice The Apprenticeship Model vests huge responsibility in line leaders

⁶⁰ Edgar H Schein, *Organizational Culture and Leadership*, 3rd ed. (San Francisco: Jossey-Bass, 2004), 298.

⁶¹ Joseph L. Bower, *The CEO Within* (Boston: Harvard Business School Press, 2007), 8.

⁶² Tichy, 207.

⁶³ *Ibid.*, 202.

who supervise other leaders But developing leaders is not their task alone. It is a companywide priority. People throughout the organization create jobs, lend their observations, remove obstacles—whatever it takes to keep leaders growing.⁶⁴

The components of a succession plan best practices listed in Table 7 fit hand in glove with the apprenticeship model. However, Charan is careful to point out that apprenticeship takes years to develop and not months.⁶⁵ It also requires bosses to be committed to the advancement of high potential people in their employ. In other words, the plan is intentional and systematic, impossible to even consider given a sudden vacancy and the need to assess candidates within a brief period in order to vet one or two for a competitive showdown. In short, it describes a plan, process, and commitment to development over time. The model illustrates the great advantages of “an outgoing CEO (who) remains on for a brief transitional period after the announced succession and contributes to the success of the incoming CEO by orienting the new CEO to how the board operates and what pressing issues loom on the horizon.”⁶⁶ The vital transfer of knowledge and relational networks can take place during this type of succession model. According to this author, in almost every respect the Apprenticeship Model reflects the ultimate match of data and systems required to install and manage an effective, multilayered succession process.

Family Business Succession

Although some family businesses develop into large conglomerates whose leadership no longer feels the touch of the founder or extended family, the dynamics of

⁶⁴ Ram Charan, *Leaders at All Levels* (San Francisco: John Wiley and Sons, 2008), 2-3.

⁶⁵ *Ibid.*, 30.

⁶⁶ Saporito and Winum, 173.

smaller, family-run businesses display unique characteristics worthy of note. The intimacy of a family-run business displays some of the same characteristics of a church structure, especially in light of the theological underpinnings of familial references used in New Testament writings such as brother sister and even elder. Therefore, it seems correct to include certain characteristics of family business succession to the material heretofore presented. The following data surrounding family-owned businesses highlight their importance and prevalence around the world.

Table 10. Family business facts⁶⁷

• Family businesses define 90% of all business enterprises in North America—62% of total US employment
• 60% of current worldwide enterprises are family-owned, generating 40-60% of world GNP
• Only 30% of family businesses in America will pass the reins to the next generation—70% would like to.
• By the 3rd generation, only 12% of family businesses in the US are still viable; 3% survive to the 4th generation
• Innovation in family business improves when more generations of the family are involved
• Return on investment is greater in family businesses, averaging 6.65% greater return than nonfamily firms
• The average life span of a family business is 24 years.
• Between 10 and 15% of family firms are managed by nonfamily executives.
• 47.7% of all family owned businesses collapse due to the founder's death or in 29.8%, the owner's death. Only in 16.4% did the business fail in an orderly transition and only 6.1% in an owner's retirement.

The statistics above reveal the vast importance of the family businesses that populate our cities, towns, and villages. They also underline the pervasive truth that family-owned businesses rarely exist for the grandchildren to take over. This failure rate has become the fodder for similar statements in such far flung countries as Mexico, Brazil, China, Italy, and Scotland, where the locals remind us, “The father buys, the son builds, the grandchild sells, and his son begs.”⁶⁸ Yet the question asked of founders and

⁶⁷ Tichy, 236.

⁶⁸ Mitchell Kaneff, *Taking Over: Insider Tips from a Third Generation Leader* (New York: Ten Eagles Press, 2011), 1049, Kindle.

owners are the same question asked of large corporate entities, “How do we, the current generation of leaders, mentor, teach, coach and provide our potential successors with the right crucible experiences that will truly prepare them to make good business decisions in all three key judgment areas: people, strategy, and crisis?”⁶⁹

Family or Profit

The central issue for owners of family-owned businesses is the family/profit conundrum: “Should family dynamics be the compass point for decision making, or should the decision for leadership and future accountability be based on what the company culture, customer expectations, and family and business goals require?”⁷⁰ This tug of war between family and profit is a primary stressor for many family businesses. Andrew Keyt, Executive Director of the Family Business Center at Loyola University’s Quinlan School of Business states, “It is a rare leader in a family business who can both create a stronger business and nurture family relationship. But the most successful successors understand that a unified family is the foundation for a family business that can last for generations.”⁷¹ Seen from a slightly different angle is this statement.

The common mentality of leaders in the field of family business has been to protect the golden goose (the business) at all costs. But the golden goose isn’t the business; it’s the family. If a family leader protects the business at all costs, she often sacrifices the family relationships—and the legacy that can sustain it across generations.”⁷²

⁶⁹ Tichy, 241.

⁷⁰ Franzetta and Jackson, 40.

⁷¹ Andrew Keyt, *Myths and Mortal* (Hoboken, NJ: John Wiley and Sons, 2015), 104.

⁷² *Ibid.*, 105.

Contrary to a nonfamily, corporate entity, which derives its identity and personality from a CEO, a family-owned business “derives its identity from its history, drawing its strength from the unity of the family. It is forged not in the boardroom but around the family dinner table.”⁷³ Trust proves to be the “family currency.”⁷⁴ Yet family dynamics simmer with friction often because the lines are blurred repeatedly between the family relationships and the business. Silence rules the day: “Family members involved in a business tend to ignore questions about the purpose of their business ... they tend to avoid building and following strong business processes ... (and) they avoid discussing controversial decisions—all because they’re family.”⁷⁵

This dance between the family and the business, in many cases, revolves around survival. If blood is thicker than water, then family survival is paramount. Yet food on the table, property, and children’s educational needs clamor for attention. Two mouths must be fed. “The key to succession planning (in a family owned business) is to set up structures and processes that keep these two types of survival from leveraging each other for survival.”⁷⁶

Research by Pieper and Astrachan⁷⁷ has shown there are four main aspects to the sense of cohesion of the family that keep them together across generations:

⁷³ Keyt, 82.

⁷⁴ Ibid., 133.

⁷⁵ Michael A. Lobraico, Jonathan Isaacs and Mitchell Singer, *Succession Planning for Family Businesses* (New York: BPS Books, 2011), 21.

⁷⁶ Ibid., 43.

⁷⁷ Greg McCann, “Aligning With Values Helps Family Business Cohesion,” *Stetson University Today*, (March 13, 2015), accessed November 25, 2015, <http://www.stetson.edu/today/2015/03/aligning-with-values-helps-family-business-cohesion-success>.

business financial (the financial success of the business); family financial (the use of family financial resources to help each other); business emotional (the sense of pride, identity, and status that family members derive from being associated with the business) and family emotional (the basic sense of connection members have to each other).⁷⁸

The cohesion comes not from the financial elements alone, but primarily from the connection with other family members and the overall pride in the collective success of the business. Therefore, a successful leader of the business must foster high values not only in the economic metrics, but also the more elusive emotional metrics. When family cohesion goes breaks down and wounds fester, disaster is immanent.

Potential Pitfalls

New Englanders enjoyed front row seats in a family business train wreck named Market Basket, a family owned chain of seventy-one grocery stores scattered through the northeast. Although the fight did not center on succession issues, the battle lines were drawn over the shift in loyalty from one board member who traditionally supported the existing CEO, Arthur T. Demoulas, throwing her vote to the opposing faction on the board led by Arthur S. Demoulas. Arthur T. was replaced by nonfamily co-executives. The drama took on far greater substance when employees boycotted the stores and sixty-eight store managers said they would work for no one but the former CEO.⁷⁹ The Market Basket furor illustrates a “business that fell victim to the classic conflict between shareholders working in the business who want to reinvest profits in it and those not

⁷⁸ Keyt, 111.

⁷⁹ Tierney Sneed, “Power to the People: Market Basket Case a Rare Worker’s Win,” *U.S. News and World Report*, August 28, 2014, accessed November 17, 2015, <http://www.usnews.com/news/articles/2014/08/28/market-basket-case-a-rare-workers-win>.

working in the business who want liquidity and/or current income.”⁸⁰ Such squabbles can become even more heated when a long-term founder of a family enterprise approaches the matter of succession.

Keyt’s book titled *Myths and Mortals*, speaks to the legend that grows around a family business leader who finds success. With regards to succession,

the shadow the mythology creates makes the successor’s task seem almost impossible, and the predecessor’s success seemingly magical. The truth shows otherwise. The successes of the predecessors and of the family were the result of hard work and vision, combined with failure, doubts, the contributions and support of others, and even a bit of luck. Too often, the ego enjoys bathing in the glory of this myth, encouraging it to flourish.”⁸¹

In order for a successor to step out from under the shadow of such a legend, he or she must develop a strong sense of differentiation, “the ongoing work of developing a strong sense of self, and harnessing that strength for the growth of the family legacy.”⁸² The new leader must carefully and reverently separate fact from fiction in the predecessor’s life, but also engage in deep personal reflection about himself, becoming authentic to their own unique style of leadership while holding fast to the values that shaped the company before him or her.

Perhaps the most difficult aspect of family-run businesses is the specter of nepotism that hovers over succession planning.⁸³ A potential leader’s last name does

⁸⁰ Craig E. Aronoff, Stephen L. McClure, and John L. Ward, *Family Business Succession* (New York: Palgrave Macmillan, 2011), 854, Kindle.

⁸¹ Keyt, xxii.

⁸² *Ibid.*, xxvi.

⁸³ Other unique concerns within a family business that hover in the background are tax and inheritance issues, buy-sell agreements, and legal issues regarding equity agreements for those who work in the company and those who do not. For the sake of this study, each of these items stands outside the focus on succession.

matter, but often its importance is negative, not positive. Unless the principles of promotion are merit based and performance oriented, the opportunities for bitterness and rancor can hamstring business success, especially in governance pipelines that are a mixture of family and nonfamily management. Even in the best circumstances, it is often necessary for “family members to work harder than their nonfamily peers to succeed.”⁸⁴ Family members in line for promotion should not only have met acceptable educational standards, but they are often asked to work outside the company for a period of time in jobs that have real risks and real rewards, earning their stripes under another company’s logo. Upon reentry to their family firm, they will have achieved a higher level of acceptance, if grudgingly, from observers and peers. One place to address topics like criteria for advancement is a family forum

in which family members can address how the business impacts them as a family and how they as a family influence the business ... [It] provides a place for the family to educate and develop younger family members for their future roles as owners and leaders of the business. It also helps family members maintain unity and trust in the face of new challenges that come with the growth in size and complexity of both the family and the business.⁸⁵

Again, as stated earlier, the interwoven relationship dynamics of family-run businesses closely mirror the familial-like leadership structures of many local churches.

Church Leadership Succession

More Than Replacement Management

The publication in 2004 of Weese and Crabtree’s seminal work, *The Elephant in the Boardroom*, set the pace for an increasingly common publication of materials

⁸⁴ Rothwell, 251.

⁸⁵ Aronoff, McClure, and Ward, 751-758.

addressing church pastoral succession. Indeed, prior to that book’s release, the discussion of how to handle pastoral transitions could be described as ‘leave it to the professionals.’ Leave the decision of who the local church’s next pastor might be to a process led by a judicatory body or individual representing a group of churches that has the contacts and expertise to offer appropriate candidates to the now open congregation. As late as 2005, this was the suggestion of experienced leaders such as Loren Mead from the Alban Institute who made this recommendation for terminations after very long pastoral tenures.

If the former pastor has been around a relatively long time (sometimes as few as eight years, sometimes as many as 25), you can expect some issues to surface. There may be an effort to crown one of the associates with the senior pastor’s position. Don’t listen to stuff about Elijah’s mantle for Elisha—you can’t expect a fiery chariot to fix this one! This has been known to work, but it is almost always an unhappy choice, both for the person chosen and for the congregation.⁸⁶

Mead goes on to suggest the use of an interim pastor, saying that decision “is always preferable to choosing one of the associates.”⁸⁷ A growing cry from both national and international church leaders is that “succession is not about filling leadership vacancies; it’s about creating an organization’s future.”⁸⁸ More than that, it is about developing successive generations of leaders who will be equipped to step into influential places, lending their gifts and talents to the church’s growth and effectiveness. Indeed, “finding and grooming leaders for succession is one of the chief tasks of leadership.”⁸⁹

⁸⁶ Loren B. Mead, *A Change of Pastors...And How it Affects Change in the Congregation* (Herndon, VA: The Alban Institute, 2005), 25.

⁸⁷ Ibid.

⁸⁸ Chand and Bonner, 1.

⁸⁹ William Vanderbloemen and William Bird, *Next: Pastoral Succession That Works* (Grand Rapids, MI: Baker Books, 2014), 147.

Succession is Leadership Development

Jack Welch, former CEO of GE, carefully noted that the development of others is a necessary part of leadership. “Before you become a leader, success is all about growing yourself. After you become a leader, success is about growing others. Every leader has a responsibility to develop those who can move the organization forward.”⁹⁰ In the Christian context, the issue is one of legacy, not simply for the outgoing leader, but also for the local church—and more importantly, for the kingdom of God. “Succession in Christian leadership is essential to accomplish God’s grand design for human redemption. As the Father gives Jesus all power for the singular and ultimate purpose of bringing eternal life to all people, Christian leaders must never lose sight of the same goal.”⁹¹ David McKenna, a longtime college president, goes on to say, “We cannot lose sight of our primary task. It is to develop mature disciples who are ready to step into the role of leadership Our legacy will be written not in the good things that we have done as Christian leaders, but in the greater things that our successor will do.”⁹² This definition of legacy is reiterated in an oft-quoted statement by leadership guru, John Maxwell.

Of all the laws of leadership, the Law of Legacy is the one that the fewest leaders seem to learn. Achievement comes to someone when he is able to do great things for himself. Success comes when he empowers followers to do great things with him. Significance comes when he develops leaders to do great things for him. But a legacy is created only when a person puts his organization into the position to do great things without him.”⁹³

⁹⁰ Chand and Bonner, 63.

⁹¹ McKenna, 120.

⁹² McKenna, 121, 123.

⁹³ Gary L. Johnson, *Leadership Shift* (Indianapolis, IN: Moeller Printing, 2013), 169.

Such legacy management cannot hope to be accomplished through existing systems of pastoral transitions in which the outgoing pastor makes every effort to hide his or her move until a suitable relocation or retirement plan is in place, then leaves the choice of his or her successor to the hands of surprised and untrained lay leaders. These leaders

typically locate the new pastor with limited tools and methods to complete the search. All too often the new successor pastor is not a match for the church culture and does not relate well to the congregation or community. Moreover, relational conflicts often result between the incoming and transitioning pastor because they did not have the opportunity to work together on the church staff.⁹⁴

This is the pattern that has dominated the landscape of pastoral transitions. The recurring product of such a process is aptly described by long-term pastor Naomi Dowdy.

As soon as you leave and transition out of the church organization, a new leader will come in and “tear down” everything you have worked and sacrificed for and rebuild it from scratch, according to his/her personal vision. That is going to be hard for you and for the people. It can almost become years of wasted time, energy, money, and calling [It] is both hurtful and wasteful.⁹⁵

If raising a new generation of leaders is fundamental to the role of existing leaders and its neglect harmful to an organization, the question of resistance to succession begs to be addressed.

Facing the Reality of Transition

Perhaps no decision looms larger for a pastoral leader than when he or she is face to face with the final ministry transition. The table below is a compilation from several sources of sources of anxiety surrounding succession issues.

⁹⁴ Johnson, 67.

⁹⁵ Naomi Dowdy, *Moving On and Moving Up: from Succession to Significance* (Lake Mary, FL: Strang Publications, 2010), 19.

Table 11. Factors for resisting succession and transition

<i>Resistance Factors</i>	<i>Descriptions</i>
Insufficient Funds	Lack of necessary or perceived need for retirement funds
Lost Identity ⁹⁶	No clear understanding of place and purpose in retirement
Fear	Becoming a lame duck leader until leaving
Ignorance	Unsure about process or even where to start
Lost Momentum	Concern for church's welfare in and after a transition
Threat and Intimidation	Process seems personal and harmful to self and family
Anxiety ⁹⁷	Concern over loss of power, privileges, and status
Ownership	Considers the church and its success as one's own
Current Identity	The job defines the leader. "This is what I do, who I am."
Capacity	Strength remains to continue ministry
Pride ⁹⁸	Thinks no one can lead the church like he/she can
God's Sovereignty ⁹⁹	Any transition plan is a presumption on God's will

It is imperative for every leader to look into his or her soul and examine these resistance factors carefully in order to fully embrace a productive tomorrow. "If we cannot let go of the present and imagine a future beyond what we are currently doing, we will never be able to receive the new things that God has in store for us, nor envision a dramatically different future."¹⁰⁰ Dowdy adds to this optimistic view by reminding her readers that "perhaps everything you have been doing up until this present moment was actually practice and preparation for your real assignment from God. Could it be that your finest hour is yet ahead?"¹⁰¹ Although this admonition challenges the despair of certain leaders entering a succession process, few professions better prepare a retiring leader for continued impact on future generations like pastoral ministry.

⁹⁶ Johnson, 153.

⁹⁷ John Finkelde, *Next!* (Self published, 2014), 142-147, Kindle.

⁹⁸ Tom Mullins, *Passing the Leadership Baton* (Nashville, TN: Thomas Nelson, 2015), 38-46.

⁹⁹ Bob Russell and Bryan Bucher, *Transition Plan* (Louisville, KY: Minister's Plan, 2010), 18.

¹⁰⁰ *Ibid.*, 2.

¹⁰¹ *Ibid.*, 16.

Samuel Chand suggests one more factor that troubles many leaders—the inability to “face our own mortality. Too many business owners are married to their business As a result, they equate retirement with death.”¹⁰² Yet pastors must never lose sight of their organic roots—all living things have a shelf life.

A Leader’s Shelf Life

On February 28, 2013, the world witnessed a phenomenon that had not happened in six hundred years. The sitting Pope resigned, triggering a process of succession. Admitting that his health was in decline and staying in office would only hurt the Catholic Church, Pope Benedict left the papacy. Bob Russell says, “We don’t wait until a tire blows before buying new ones.”¹⁰³ Once the effectiveness of a leader begins to wane, it is time for change. Mandatory age limits were set in place even during Moses’ guidance of Israel in the desert. In Numbers 8:25, the Law required that Levites over fifty were no longer allowed to participate in carrying the items of the tabernacle.

A succession planning process records the season of organizational change from one leader to another. The reasons for such change should be obvious. As compared to the list in Table 20 describing resistance factors for transition within a leader, the following list describes factors that might support a change in leadership.

- Older leaders fail to inspire younger people.
- Older leaders lose energy and imagination as they age.
- A desire to retool and a thirst for learning begins to fade.
- A sense of urgency wanes and energy is depleted.

¹⁰² Chand, 20.

¹⁰³ Russell and Bucher, 25.

- Vision for a new future grows stale and dated.
- A willingness to change and adapt grow more difficult to achieve.¹⁰⁴

When organizations and their senior leaders fail to address these factors they can create a bottleneck, which prevents new leaders from advancing and the church or organization from taking advantage of new paradigms, technologies, and opportunities. A wise leader recognizes these factors and provides space for someone else to write the organization's next chapter. "If you really believe that pruning, seasons, and life cycles are as real as gravity, you will not have to be talked into them; and you will always be looking for them."¹⁰⁵ However, admitting succession is needed is only the first step in a senior leadership transition. "The senior pastor is the one to not only acknowledge that the time for change is approaching, but to also be the one to lead and champion the change emotionally and spiritually."¹⁰⁶ Every aspect of a succession rests in the hands of the outgoing leader, including the stages of identification, promotion, planning and implementation.

Succession Planning and Management

Once a leader determines that succession is a viable and desired future for himself or herself and the church, the need for a process becomes paramount. Table 7 highlights plans offered by two authors.

¹⁰⁴ Johnson, 23.

¹⁰⁵ Henry Cloud, *Necessary Endings* (New York: Harper Collins, 2010), 87.

¹⁰⁶ Jay Passavant, *Seamless Succession: Simplifying Church Leadership Transitions* (Xulon Press, 2015), 251-253, Kindle.

Table 12. Two succession plan templates

<i>Three Stage Plan</i> ¹⁰⁷	<i>Description</i>	<i>Four Stage Plan</i> ¹⁰⁸	<i>Description</i>
What needs to be in place?	Recognizing church identity	Inward	Outgoing pastor examines his future and needs of the church
Who will lead?	Gifts/Credentials/Calling	Outward	Discussion begins with leadership team and family
When/how will transition happen?	2 Models: Internal Apprenticeship, External Calling	Upward	Refine a plan in prayer
		Onward	Carry out the transition of outgoing and incoming leaders

John Finkelde adds another perspective with his four phases of succession: situation assessment, engagement, selection, and transition.¹⁰⁹ Leadership strategist Dick Daniels offers further wisdom about not only the steps of the process, but clarity regarding the order.

Review strategy before considering structure and decisions about staffing. This sequence is often done in reverse order which rarely works. Strategy answers the questions: “Where are we today? Where do we want to go? How will we get there?” Structure allows a review of the most effective configuration to align all resources in order to achieve the strategy. Staffing is the final piece of the puzzle identifying “who” is needed in light of the updated strategy and structure.¹¹⁰

Regardless of the process used to guide the transition, a clear framework is needed on which the timeline, flow of communication and stage ownership can be attached.

The Effects of Polity and Culture

Of course, the polity of the church and covering organization determines the stages and even possibility of succession. Lescalleet lists three forms of governance in his

¹⁰⁷ Lescalleet, 2351-2538, Kindle.

¹⁰⁸ Chand and Bonner, 10-11.

¹⁰⁹ Finkelde, 208-357, Kindle.

¹¹⁰ Dick Daniels, *Leadership Briefs: Shaping Organizational Culture to Stretch Leadership Capacity* (Minneapolis, MN: Beaver’s Pond, 2015), 1973-1977, Kindle.

project, information taken from Wayne Grudem’s book on systematic theology.¹¹¹ The Episcopalian form of government is a one-person decision making body, functioning over a church as a bishop or as the head of a church in the role of pastor. This form of government describes not only Anglican communities, but also many independent, Pentecostal and Charismatic churches. In the Presbyterian form of government, local church elders, both ruling and teaching elders, call a pastor. The final form of government described by Lescalleet is a Congregational structure in which the congregation makes the final say on major decisions such as pastoral selection. This form of government, however, includes many variations, offering in many cases a hybrid of the two previous forms along with congregational choice. Regardless of polity, Lescalleet concludes that “there does seem to be wisdom in allowing outside voices to speak into a local congregation through some kind of association. Even if that association is voluntary, outside counsel is always a good thing. This would seem especially helpful when working through pastoral transition.”¹¹²

Not only is the form of government critical in determining succession, but church culture must also be considered. “The culture of a church is a composite of the history, the traditions and the personality of a church congregation. It describes what it feels like to be part of a particular church and how things are done in that environment. Culture is often unspoken but it is very influential.”¹¹³ Vanderbloemen and Bird list four such church cultures, presenting them in a quadrant represented by a horizontal axis with the

¹¹¹ Wayne Grudem, *Systematic Theology* (Grand Rapids, MI: Zondervan, 1994).

¹¹² Lescalleet, 1834-1836.

¹¹³ Mark Conner, *Pass the Baton: Successful Leadership Transition* (Rowville, Australia: Conner Ministries, 2010), 6548, Kindle.

title Complexity to Simplicity and the vertical axis titled Group to Individual. Those four cultures are described as key administrator, chief of chiefs, executive, and king (or queen).¹¹⁴ The two axes describe the relative complexity of “programming that directly involved the church’s senior leadership [and the] location of power and decision making.”¹¹⁵

Ten years previous to this study, Weese and Crabtree included a similar four-quadrant church-culture diagram with two different lenses. Rather than using programming and power as their functional categories, Weese and Crabtree used personality and knowledge to describe the two axes that shape the four-quadrant characteristics. Those four cultures were described as a family culture, archival culture, icon culture, and replication culture.¹¹⁶ Whether using Vanderbloemen and Bird’s quadrant categories, or Weese and Crabtree, a succession plan will hinge on how the organization and its polity function. It is therefore imperative that pastors and church leaders identify their match of structure and decision making in determining next steps. Each culture has “their own vocabulary, an identifiable set of values, their own set of rewards and punishments ... [and] distinct role for the pastor.”¹¹⁷ The closer the culture aligns with the vision for the future, the better match will be made in choosing a successor. Indeed, the selection of a successor is the second most important part of any succession plan, lodged just behind the support and advocacy of the current leader.

¹¹⁴ Vanderbloemen and Bird, 73.

¹¹⁵ Ibid., 72.

¹¹⁶ Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom* (San Francisco: Jossey-Bass, 2004), 63.

¹¹⁷ Ibid., 62.

The Value of Internal Candidates

Most of the literature that is rapidly hitting the market regarding church succession espouses and records the choice of internal candidates—leaders who were part of the organization prior to discussions of succession.

Resumes, degrees, interviews, ordination papers, references, and trial sermons may tell us some things about a potential candidate for the ministry. But when it comes to really understanding that candidate—his character, work habits, personality traits, and family relationships—there is no substitute for working alongside that person over a period of time.¹¹⁸

Tom Mullins and others refer to these as spiritual sons and daughters. “Regardless of whether or not you have a biological son ready to take the baton, you need to be intentional about raising spiritual sons.”¹¹⁹ Naomi Dowdy, who trained and chose a member of our staff as her successor, says the best successor is someone who is the product of a process that is “intentional and homegrown.”¹²⁰ The benefits are many.

Advantages of internal candidates are that you both already have a sense that the chemistry is a good fit. They already understand a bit about your church’s DNA and your community. They have already developed some degree of trust and respect among the congregation. They know the family and the systems that run it, and their transplanting into the body will have a much higher probability of being a good “tissue match.”¹²¹

One of the preferred models used by many large church pastors who have successfully passed the leadership baton to a successor is relay succession, “a process of succession

¹¹⁸ Russell and Bucher, 52.

¹¹⁹ Mullins, 93.

¹²⁰ Dowdy, 28.

¹²¹ Vanderbloemen and Bird, 149.

where the incumbent and successor run in tandem for a period of time.”¹²² Weese and Crabtree call this process an overlapped transitional scheme.¹²³ Robert McCready studied this somewhat rare model in Church of God congregations and concluded that “while not all churches can or should utilize a relay succession, for those scenarios where one is warranted, it can provide a positive experience for the incumbent, successor, and congregation.”¹²⁴

*The Imperative of Pervasive
Leadership Development*

Indeed, the atmosphere or context conducive to internal candidates often requires long-term pastorates, adequate financial resources, as well as a senior leader who believes in a culture of continual leadership development. Perhaps the most glaring sticking point of the three is not the lack of resources to support two leaders for a period of time, but the philosophy of the senior leader. A self-absorbed leader “will generally restrain himself from training, empowering, or trusting any up and coming leaders within the organization ... because such a person is seen as a threat and might ‘outshine’ him.”¹²⁵ This one-man show mentality is deadly to any organization, but especially to churches, where the nature of relationships is described as a body (1 Cor. 12; Rom. 12). Leaders must insist on duplicating themselves. A quote attributed to D. L. Moody says, “It is better to train a

¹²² Robert C. McCready, “Relay Succession in the Senior Pastorate: A Multiple Case Study Method” (PhD diss., Southern Baptist Theological Seminary, 2011), 6.

¹²³ Weese and Crabtree, 140.

¹²⁴ McCready, 153.

¹²⁵ Al M. Reimer, *Transitions—Stepping Into the Shoes of a Predecessor: Mastering the Art of Taking Over from Someone Ahead of You* (Friesen Press, 2014), 7919-7922, Kindle.

hundred men than to do the work of a hundred men.”¹²⁶ The importance of raising new leaders cannot be overstated. “Organizations live and die on the basis of their flow of new leadership talent.”¹²⁷

At the heart of gospel transmission is passing on not only the truth but also truth in action to successive generations, one person at a time. Yet building capacity at all levels of a church is also critically important and vital to its continued growth and health.

If we are going to make the transition from acquiring great leaders to developing great leaders, then we must adopt a different view of the people in our churches. Ultimately, leadership development is as simple and organic as one person believing in another and building into his or her life. To do so, one must have the heart of a developer. We have to view people much differently from the way we naturally would. We must put on the eyeglasses of potential.¹²⁸

Churches need “strategic thinkers and planners ... marketing and communication experts ... people with skills in personnel recruitment, management and coaching ... who understand financial management ... [and] psychologists and counselors ... [and] professional artists.”¹²⁹ Together, these members of a local body create momentum, especially if given the opportunity to build seamlessly on the efforts and wisdom of predecessors. But this leadership capacity should not only be focused on one church, but also on what Weese and Crabtree describe as a wider “global leadership bench,”¹³⁰ providing leaders for other churches and parachurch organizations apart from their own.

¹²⁶ Chand and Bonner, 25.

¹²⁷ Hans Finzel, *The Top Ten Leadership Commandments* (Colorado Springs, CO: David C. Cook, 2012), 197.

¹²⁸ Rowland Forman, Jeff Jones, and Bruce Miller, *The Leadership Baton: An Intentional Strategy for Developing Leaders in Your Church* (Grand Rapids, MI: Zondervan, 2004), 337-340, Kindle.

¹²⁹ Weese and Crabtree, 24.

¹³⁰ *Ibid.*, 38.

In fact, such leader generators become teaching hospitals for surrounding organizations that might not have an internal candidate from which to choose.

Competencies of High Capacity Leaders

Competencies needed for such high capacity leaders include not only Bill Hybels's three hiring mandates—competence, character, and chemistry—but also other vitally important characteristics for success.¹³¹ Mullins adds that leaders must be team builders and must be gifted and skilled especially in communication. They must practice good organizational management, be fruit bearing, and, as stated earlier, be DNA carriers.¹³² In providing training experiences and mentoring, current leaders should strengthen a future leader's problem-solving skills through cross-training (learning multiple roles and responsibilities) and stretch assignments (work assignments that push one's limits) in real life situations with real consequences. Greg Johnson boils his preferred successor profile down to three characteristics: spiritual vitality, professional ability, and personal stability.¹³³ He rightly unpacks spiritual vitality by listing qualities such as compassion for broken and unbelieving people, transparency, an authentic call to ministry, a commitment to lifelong learning and a sheer love for people.¹³⁴ Regardless of the list of competencies observed, tested, and assessed, the crucible for such a compilation of information is real life situations found in everyday congregational

¹³¹ Vanderbloemen and Bird, 155.

¹³² Mullins, 80-86.

¹³³ Johnson, 177.

¹³⁴ *Ibid.*, 87.

settings over time. The opportunity for such assessment is impossible through external or outside recruitment processes.

Managing Change

Three Models

“With a succession plan in place, an organization is ... primed to take advantage of change.”¹³⁵ And therein lies the dilemma for many outgoing pastors. The organization might be ready but this type of shift in identity and responsibility and even sometimes location yet for the leader, such a transition often catches them unprepared. Two authors are commonly quoted in discussions of change and transition. William Bridges wrote a seminal work called *Managing Transitions* in which he describes the three phases of transition.

1. Letting go—of the old reality and the old identity. Transition starts with an ending.
2. The Neutral Zone—an uncomfortable stage where repatterning and adjustments are needed
3. The New Beginning—a new identity is developed, leading to new energy and a sense of purpose.¹³⁶

Both the congregation and the exiting pastor go through the transition, but each interprets the journey from different perspectives. The congregation asks about the forward movement of the church, what will shift and how it will affect their comfort and opportunities. The pastor experiences the pain of inevitably leaving one stage of life and entering another. Bridge’s model of transition helps a leader identify and better understand the current stage in which he’s found.

¹³⁵ Chand and Bonner, 7.

¹³⁶ William Bridges, *Managing Transitions*, 3rd ed. (Philadelphia: Da Capo Press, 2009), 4-9.

On the other hand, John Kotter's eight-stage model provides a congregational plan of moving forward through the process of change.¹³⁷ A blend of Kotter's steps with an application to succession is instructive.

1. Establishing a sense of urgency. There is no greater urgency than entering the unknown waters of personal and corporate leadership transitions, especially if the exiting leader is moving into another profession or retirement.
2. Creating the guiding coalition. The wise pastor surrounds him- or herself not only with a trusted board, but also a family who is fully informed and an outside consultant or coach that not only listens to the participants, but also helps guide the process.
3. Developing a vision and strategy. This is the heart of succession—the succession plan. It includes the timeline, successor's developmental plan, benchmarks, and expectations for the handoff. It also should include an integration plan for the new leader's first one hundred days in his or her new role.
4. Communicating the change vision. Who knows what when. The ripple effect of family, executive board, staff, ministry leaders and eventually the entire church should be carefully orchestrated to answer questions in the proper timing to achieve maximum buy in and clarity.
5. Empowering broad based action. This stage allows for hard choices, new initiatives, and fresh approaches to ministry agreed to by both incoming and outgoing leaders that protects the new leader from the need for immediate changes.
6. Generating short-term wins. Shared preaching schedules, shifts in board management, staff leadership, vision and mission tweaks, and ministry staffing adjustments all fall into these incremental changes taking place before handoff.
7. Consolidating gains and producing more change. The adjustments become larger as one leader increases and the other decreases.
8. Anchoring new approaches in the culture. All changes should be accomplished many weeks ahead of the actual transfer of leadership in order to set the stage for a grand celebration of the predecessor and the inauguration of his or her successor.

Esther Cameron and Mike Green suggest reshaping Kotter's model to a “continuous cycle rather than as a linear progression”¹³⁸ and criticize the seeming lack of

¹³⁷ John P. Kotter, *Leading Change* (Boston: Harvard Business Press, 1996), 21.

¹³⁸ Esther Cameron and Mike Green, *Making Sense of Change Management* (Sterling, VA: Kogan Page, 2004), 101.

“forceful concepts”¹³⁹ in steps 7 and 8. However, the need for change should rightfully diminish during the final stages of a leadership transition as well as during the initial stages of integration for the new leader.

Alan Deutschman suggests three keys to change that can help create a pathway for the future.

- | | |
|---------|--|
| Relate | You form a new, emotional relationship with a person or community that inspires and sustains hope. |
| Repeat | The new relationship helps you learn, practice, and master the new habits and skills that you’ll need. |
| Reframe | The new relationship helps you learn new ways of thinking about your situation and your life. ¹⁴⁰ |

These three keys focus on relationships, people around us who bring hope, new skills, and new ways of thinking. A coaching relationship can help fill this relational need and, along with the Holy Spirit’s direction, provide the path to a meaningful final season of life. “A coach provides a partnership to help others improve their quality of life, discover their passions, find their purpose for living, and get free from their limitations, fears, and other obstacles so they can achieve their goals and life dreams.”¹⁴¹ Especially as the need to recalibrate and find new uses for strengths and gifts that once found expression in pastoring, a leader in transition must find someone who will walk with them through the changes. “For many leaders, the expression ‘It’s lonely at the top’ rings true. They are hungry for a neutral advisor dedicated to understanding their special challenges—

¹³⁹ Cameron and Green, 101.

¹⁴⁰ Alan Desutschman, *Change or Die* (New York: Regan, 2007), 14-15.

¹⁴¹ Gary R. Collins, *Christian Coaching*, 2nd ed. (Colorado Springs, CO: NavPress, 2009), 238.

someone who can offer wise advice that enables them to optimize both their performance and career growth.”¹⁴²

Beyond the Final Bow

Perhaps the greatest truth an outgoing leader can be helped to understand is that there is life beyond the final bow. There can be an encore. “The Encore stage ... is characterized by confluence over reinvention, by the weaving together of accumulated skills, insights, perspective, and experiences into a new amalgam The end result promises to be a windfall of talent.”¹⁴³ Marci Alboher, in her book *The Encore Career Handbook*, describes the value that accrues as people age. “The latest neuroscience research shows that some things improve as we pack on the years. We become more empathic, we get better at synthesizing ideas, making connections between disparate ideas and solving complex problems ... we may forget where we put the keys, but we may be able to settle a major labor dispute.”¹⁴⁴ Although directed to CEOs in succession mode, executive coach Marshall Goldsmith’s observation rings true for outgoing pastors.

If you leave the CEO role in your sixties (most do), you may well have twenty or more “good years” ahead of you. Today, when people, like you, have the ambition, drive, and energy to achieve great success in any field, it is very unlikely that your ambition, drive and energy will just stop when you change jobs I have an important suggestion: use this time to start planning something exciting to do for the rest of your life.¹⁴⁵

¹⁴² William C. Byham, Audrey B. Smith, and Matthew J. Paese, *Grow Your Own Leaders* (New York: Prentice Hall, 2002), 242.

¹⁴³ Marc Freedman, *The Big Shift* (New York: Public Affairs, 2011), 170.

¹⁴⁴ Marci Alboher, *The Encore Career Handbook* (New York: Workman, 2013), 3.

¹⁴⁵ Marshall Goldsmith, *Succession: Are You Ready?* (Boston: Harvard Business Press, 2009), 8, 10.

Bob Buford, former cable television entrepreneur turned author, calls this encore stage halftime. His first book of the same name was published in 1995 with the subtitle *Moving from Success to Significance*. The primary aim was to ask marketplace leaders to leverage their skills, passion, networks, and most importantly, their faith, to move from keeping score externally (money, fame, power) to keeping score internally. In his own words, “I define [significance] as ‘using your knowledge and experience to serve others’; and by serving others, you serve God. Peter Drucker defines the ‘end results’ of a nonprofit or ministry as ‘changed lives’: Its product is a changed human being.”¹⁴⁶ Buford’s ministry, which can be found at www.halftimeinstitute.org, has developed into a thriving seminar, coaching, and recruitment center for high capacity leaders who are willing to move into church, para-church, and non-profit entities. Ministers can also benefit from the resources of this unique organization.

Conclusion

The goal of this literature review was to compare the extant sources on leadership succession in two primary areas: corporate succession and church succession. A brief description of topics covered in select material concerning family business succession was also noted. In each of the three areas surveyed, the topic of leadership succession is of great contemporary interest, characterized by a great number of recent works on the subject. In corporate America, William Rothwell’s seminal work *Effective Succession Planning* underwent its fourth edition. Noel Tichy published another significant work simply titled *Succession*. And Ram Charan continues to publish articles and books on the

¹⁴⁶ Bob Buford, *Beyond Halftime* (Grand Rapids, MI: Zondervan, 2008), 31.

topic from various perspectives. The overall theme that emerges from these and other noted sources in the corporate setting, highlights the great importance of having internal leadership development in place at all levels of an organization as well as the consequent value to be placed on internal candidates for leadership positions.

Literature on family business succession turns the lens slightly and focuses instead on the caution of family members being chosen regardless of their business acumen and competence to lead. Andrew Keyt's work *Myths and Mortals* deals with the careful dance of successors who follow a strong founder or family predecessor. Family quarrels, financial agreements, and the need for continual forums and clear avenues of communication characterize the arena of family businesses, which represent the largest number of companies not only in America but around the world.

The topic of church leadership succession changed dramatically with the publication of *Next* by William Vanderbloemen and Warren Bird in 2014. Statistics and stories dominate the work with an added focus on megachurch successions. At the same time, other books describing succession stories emerged in the past two years (Finkelde, Johnson, Lescalleet, Moss, Mullins, Passavant, Reimer). In most of these works and others published around 2010 (Conner, Russell/Bucher, Dowdy), the succession story emerged from large church settings. And while these examples, combined with Vanderbloemen and Bird's work, make huge strides in adding to an understanding of church successions, there is little for smaller church pastors to apply directly. Most of these sources cite *The Elephant in the Board Room*, published in 2004, as one of the primary works that first informed their grasp of the issues surrounding church leadership succession.

Together, these three distinct literature reviews on a similar subject create a common language for future application and research, a discussion visited in chapter 5 of this project.

CHAPTER 4: DESCRIPTION OF FIELD PROJECT

Introduction

The hypothesis regarding the establishment of an intentional succession plan in local churches of select pastors is simple. Through knowledge, combined with group learning dynamics, facilitated by an experienced coach, intentionality can be proven to increase dramatically. The groundwork for knowledge is first established in chapter 2 where biblical leaders throughout Scripture cooperated with God's calling to appoint their successors. Such knowledge is further enhanced by examining recent and current succession practices in corporate and church settings in chapter 3.

Chapter 4 provides a roadmap for the six-hour group seminar in which such knowledge was not only introduced, but also synthesized and applied to specific ministries, all with the aid of myself as an experienced coach who initiated a successful transition in my last pastorate. Marked change in both attitude and commitment to act, on the part of seminar participants, is illustrated in statistically significant results from pre- and post-seminar surveys. This chapter will include a description of the survey and the seminar, as well as the processes of presenting both through the stages of preparation, execution, and the results. Finally, the project's contribution to ministry will be carefully explained.

Preparation of the Project

Article II, Assemblies, Section D, General Council Affiliated Assemblies, Letter D, Privileges, Number 2, of the Southern New England District Bylaws states, "In the

event of pastoral change, it is recommended that these assemblies seek the advice and assistance of the superintendent to safeguard both pastors and assemblies.”¹ This statement appears in the governing document for the district in which the leaders who are the focus of this project serve. It clearly describes the culture of not only this three state jurisdiction, but also the overall culture practiced by Assemblies of God districts across the nation. This project attempts to suggest an alternative process to the above recommendation based on two primary factors (1) no one knows the local church culture, history, and people better than the current long-term pastor and (2) choosing a successor who possesses knowledge of the local culture, history, and people better ensures future success and less momentum loss than an external candidate.

Based on the overall objective of the project outlined above, I began to collect simple statements organized by four primary areas of succession inquiry: succession awareness, succession preparation, change readiness, and the presence of a future plan. Additionally, I asked one question specific to the generally assumed Assemblies of God polity noted above. These questions formed the twenty-five question survey. Material to be used in the six-session seminar also was collected, collated, and placed within the booklet to be presented to each seminar participant.

Finally, such participants for both the survey and seminar needed to be identified, which required the acquisition of age related statistics provided by the General Secretary’s office in the Assemblies of God National Leadership and Resource Center in

¹ Bylaws, Adopted by Southern New England District of the Assemblies of God, Inc., updated June 2014, accessed October 19, 2015, http://www.snministrynetwork.org/images/stories/pdf/BYLAWS_0614.pdf.

Springfield, Missouri. That list provided sixty-three names, which ultimately served as the project pool.

Execution of the Project

Survey Development

The first draft of the survey was created the last week of July 2015. On July 29, I e-mailed the first draft of the survey along with the approved project design prospectus to Dr. Jeff Fulks, Director of Adult and Graduate Studies at Evangel University in Springfield, Missouri. Dr. Fulks assists in the statistical analysis for D.Min. students of the seminary. In rapid succession we traded e-mails and iterations of the survey on the same day, pledging to inquire about the possibility of a national distribution of the survey due to the importance of the topic. On July 30, we established the final form of the twenty-five primary questions and changed the responses to a uniform five-point Likert Scale, ranging from strongly agree to strongly disagree.

The following day, Dr. Fulks suggested that a pilot group of leaders be asked to take the survey in order to test its veracity and clarity. Two questions allowing short essay responses were added to the survey for the pilot group to expose possible problem areas or unclear statements. The first pool of pilot group participants was solicited from a Midwest district based upon a mutual relationship in the AGTS coaching cohort. This contact failed to produce a pool of participants, so an e-mail inquiry was sent on August 11 to Dr. Jim Bradford, General Secretary of the Assemblies of God, asking for contact information from at least ten leaders he could recommend to take the pilot survey. In the meantime, Dr. Fulks provided access to Evangel's account with Qualtrics.com in order to create an online version of the survey instrument.

Dr. Bradford readily provided a list of ten participants on August 13, to which I added him as well. The participants included three national executive team leaders, a Bible school professor, two superintendents, a recently retired pastor who completed a succession process, and an existing large church pastor who was a successor to one of the national leaders. Two other men, both of whom serve in advisory and consulting capacities within the national AG offices, rounded out the list. Of the eleven surveys sent to the pilot group on August 19, eight were completed.

SNEMN Survey/Seminar Participants Solicited

A list of all senior pastors over fifty-five years old was solicited from the Southern New England District Secretary/Treasurer. The secretary provided this list on September 16, including not only the target group, but also all ordained ministers in the district. The segment of the larger list that comprised the target group was identified and contact information for this subgroup was acquired. The final version of the survey came under the scrutiny of Dr. Fulks as well as the final version of the project's subjects by the district secretary. On October 2, the survey invitation was sent to fifty-nine SNEMN pastors. Two additional leaders received subsequent invitations on October 6. Five e-mail invitations bounced back, which required further investigation of working e-mail addresses. On October 6, these corrected e-mail recipients were sent the final group of invitations.

In order to perhaps provide results from a national distribution, Dr. Bradford was asked by e-mail for just such a distribution through the national office. His initial response was that permission for the use of senior pastors' e-mail contacts was rarely given, although exceptions had been made on occasion. I responded with a request to

reconsider that opinion based on the importance of the topic. In response, he placed the matter on the agenda of the Executive Leadership Team (ELT) for their October 6 meeting. In this communication stream, I requested national statistics on the ages of senior leaders in American congregations. The list provided² on September 23, displayed not only national statistics, but also statistics by region and by district. Categories covered in the statistics included ages of senior pastors in each of three credentialing categories (certified, licensed, and ordained ministers) by district and nationally, as well as age ranges of senior pastors in both district and national groupings. The report also listed the median and average age of senior pastors as well, again both on the district and national levels. The summary statistics also examined these findings in various regions of the country as established by the national office. With regard to the national distribution of the survey, the October ELT meeting results concluded that no additional exception could be made to the policy prohibiting the use of the e-mail list for the survey.

Final Surveys Received

The initial momentum for survey completion in the distributions completed the first week of October was disappointing, and the suspicion grew that some of these e-mails sent from an obscure evangel.edu address found their way to junk mail folders. Therefore, on October 14, I sent an additional two e-mails from a personal account to distinct recipients from the aggregate distribution list. The first group received expressions of thanks for completing the survey along with an invitation to a seminar event entitled “A Coach Approach to Leadership Succession.” The second group received

² The report was entitled, 2014 Lead Pastors.docx and was generated by the General Secretary’s office. Accessed September 22, 2015. Three excerpts of the full report are found in Appendix A, AG Lead Pastors Reports.

an admonition to complete the survey as well as an invitation to attend the seminar, dated November 5, 2015. Results began to pick up momentum, and eleven people responded positively to the seminar invitation. The goal for the seminar group was at least ten.

Seminar Conducted and Survey Repeated

Prior to the seminar, the survey completion process was closed. A total of twenty-nine respondents completed the twenty-five item survey, 49.7 percent of qualified participants contacted for the project. An additional seven statements were added to the original survey in order to ascertain the relative success of the seminar components in the view of the seminar participants. In addition, an essay box was created with the title “Additional Comments” to capture anecdotal reactions or suggestions.

The seminar was held at Christ Revolution Church in Lexington, Massachusetts, on Thursday, November 5. Eight senior leaders attended. Demographic information was collected during verbal introductions as part of the initial stage of the seminar. Those results are shown in figure 1 below.

Table 13. Demographic information of seminar attendees

<i>Seminar Attendees</i>	<i>Age</i>	<i>Years in current church</i>	<i>Rank Order in Current Church</i>
J. Richards	65	25	2nd
J. Gibson	59	12.5	founder
J. Quaresimo	68	14	5th
G. Collette	53	23	founder
S. Smith	64	29	2nd
B. Tilley	56	25	founder
H. Renker	70	10	2nd
J. Williams	58	25	5th

Instructions at the end of the seminar underlined the importance of completing the original survey and the additional questions. All seminar attendees completed the post-seminar survey within twenty-four hours. Dr. Fulks was immediately contacted and pledged to complete the data analysis in a timely fashion.

Results of the Project

As previously noted, the survey questions clustered around four concepts regarding succession: succession awareness, succession preparation, change readiness, and the presence of a future plan. Below is a chart listing the questions under each category.

Table 14. Survey statements per category

<i>Succession Category</i>	<i>Related Questions</i>
Awareness	(1) I have thought about leadership succession in my church or organization.
	(2) I have a complete understanding of leadership succession.
	(5) I believe the leadership of our church would be open to my guidance in identifying a successor for our church.
	(8) I would like to learn more about leadership succession.
	(22) I have read articles and/or books about leadership succession.
Preparation	(4) The leaders in the church I serve have talked about succession with me.
	(6) I am confident of the steps necessary in selecting, training, and installing a successor.
	(14) I have someone in mind for a possible successor in the church I now serve.
	(17) I have spoken with my spouse about leaving the pastorate and what that might mean for our future.
	(20) I would consider developing a succession plan for my current role given the aid of an experienced guide, consultant, or coach.
	(21) I have talked with my peers about leadership succession in the church.
Change Readiness	(7) I am fearful that any discussion of leadership succession will cause the leaders of our church to hasten my departure.
	(10) I would be willing to take a lesser responsibility in another ministry following the completion of a succession plan.
	(13) I feel confident about my financial plan for retirement.
	(15) A vocational change from the pastorate to another occupation is almost impossible to consider.
	(19) I readily embrace change when given enough facts to support it.
	(25) If the right “next chapter” opportunity appeared, I would readily embrace change.
Future Plan	(3) I am interested in identifying the next leader of the church I serve.
	(11) I would want to stay engaged in the church I currently serve following a succession.
	(12) I have a hobby or interest outside the pastorate that I would love to pursue if I was freed from responsibilities at the church.
	(16) Planning for my future is a frequent practice.
	(18) I would be happy serving another pastor in a staff role.
	(24) I have a plan for my life after I step down from pastoral responsibilities.

The only statement that stood apart from any of these categories related to Assemblies of God polity regarding succession and pastoral transitions. Item 9 states, “Our system of governance in the Assemblies of God discourages pastoral succession led by the sitting pastor.” Because the project’s participants lead AG churches and hold credentials from the national Assemblies of God organization, this item was designed to tap the matter of permission regarding succession for each pastor. In other words, do I have the right or ability to think through and plan a succession process in light of my cooperative status with the denomination? Nineteen of the respondents agreed or strongly disagreed. Two leaders were neutral and six disagreed. In the post-seminar survey responses from the eight seminar participants, these ratios were almost exactly the same.

Table 15 records the responses from each survey participant on each of the twenty-five items. Table 2 records the responses on each of the same items from only the seminar participants following their seminar participation. The data provided from the larger group will be addressed in narrative form per category listed in Figure 2 following the table.

Pre-seminar Survey Results

Table 15. Distribution of responses for pretest assessment on attitudes toward retirement and succession planning (29 participants)

Item	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	Std. Dev.
Item 1	0	1	0	11	17	1.48	.688
Item 2	0	8	10	7	4	2.76	1.023
Item 3	2	1	4	14	8	3.86	1.093
Item 4	5	13	3	6	2	2.55	1.213
Item 5	0	1	2	18	8	4.14	.693
Item 6	0	9	8	10	2	3.17	.966

Item	Strongly		Neither		Strongly		Mean	Std. dev.
	disagree	Disagree	disagree	Agree	agree	agree		
Item 7	9	11	4	2	1	2.07	1.072	
Item 8	1	2	4	16	4	3.74	.944	
Item 9	0	6	2	12	7	3.74	1.095	
Item 10	0	1	7	15	4	3.81	.736	
Item 11	5	8	7	6	1	2.63	1.149	
Item 12	1	7	2	11	6	3.52	1.221	
Item 13	2	11	5	7	2	2.85	1.134	
Item 14	2	13	3	8	1	2.74	1.095	
Item 15	5	7	4	3	5 - 6/3	3.19	1.711	
Item 16	0	4	6	14	2	3.54	.859	
Item 17	2	4	1	14	6	3.67	1.209	
Item 18	0	4	6	13	4	3.63	.926	
Item 19	0	0	0	17	10	4.37	.492	
Item 20	0	4	6	13	4	3.63	.926	
Item 21	2	6	8	6	5	3.22	1.219	
Item 22	3	8	4	11	1	2.96	1.160	
Item 23	1	2	6	13	5	3.70	.993	
Item 24	1	5	3	16	2	3.48	1.014	
Item 25	0	4	4	10	9	3.89	1.050	

In the category of awareness, survey participants had thought about succession in their contexts, but eighteen of the participants were either neutral or disagreed with the statement regarding their complete understanding of the topic. With only three exceptions, respondents believed their church leadership team would be open to guidance regarding succession. Twenty participants wanted to learn more about succession and only twelve had read either articles or books on the subject to that point.

Regarding the topic of preparation, only eight had conversations with their leaders about succession. Confidence with respect to the steps necessary for succession was lacking in seventeen respondents. Nine indicated they had successors in mind, and all but seven had spoken with their spouses about the topic. Seventeen of the participants would consider using a coach or consultant for help in developing a plan, yet almost that same number had not talked to a peer about the subject of succession.

In the area of change readiness, fear regarding the discussion of succession among the board was very low. As for a willingness to take a lesser role in ministry, all but one respondent either agreed with that approach or were undecided (seven). Financial confidence in retirement was lacking for thirteen and either neutral or high for the remainder. The impossibility of considering life after a senior pastor role proved accurate for over half the participants, yet two related questions that included the words “embrace” and “change,” revealing that with only a small minority (four), all were ready to accept it if given the right opportunity and information.

Finally, in terms of the presence or development of a future plan, twenty-two respondents agreed they would like to identify their successors. Only seven wanted to stay in the church they currently serve after succession. Seventeen had a hobby or interest they would “love to pursue” upon leaving their churches. Planning for the future was a frequent practice for sixteen participants and all but four had a post senior pastor role plan in place. For seventeen leaders, the future could include a staff position in a church.

Post-seminar Survey Results

Eight senior leaders chose to respond to the invitation to attend the seminar, resulting in a small sample size for a pre-seminar survey comparison. However, the

results were consistent with the larger group responses noted above across the four large categories with one notable exception mentioned in the results from the t-test results recorded in Table 17.

Table 16. Distribution of responses for posttest assessment on attitudes toward retirement and succession planning (8 participants)

Item	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	Std. Dev.
Item 1	0	0	0	3	5	1.38	.518
Item 2	0	2	0	6	0	2.50	.926
Item 3	0	0	2	4	2	4.00	.756
Item 4	4	3	0	1	0	1.75	1.035
Item 5	0	0	1	4	3	4.25	.707
Item 6	0	2	0	5	1	3.63	1.061
Item 7	3	3	1	1	0	2.00	1.069
Item 8	1	2	1	4	1	3.38	1.302
Item 9	0	2	1	4	1	3.50	1.069
Item 10	0	0	1	5	2	4.13	.641
Item 11	1	2	4	1	0	2.63	.916
Item 12	1	3	2	1	1	2.75	1.282
Item 13	2	1	2	2	1	2.88	1.458
Item 14	1	4	0	3	0	2.63	1.188
Item 15	1	1	0	3	2 6/1	3.88	1.642
Item 16	0	2	2	3	1	3.38	1.061
Item 17	1	0	0	4	3	4.00	1.309
Item 18	0	0	1	5	2	4.13	.641
Item 19	0	0	0	7	1	4.13	.354
Item 20	0	0	3	4	1	3.75	.707
Item 21	0	2	0	3	3	3.87	1.246
Item 22	0	4	0	3	1	3.13	1.246
Item 23	0	0	1	4	3	4.25	.707

Item	Strongly Disagree		Neither Agree nor Disagree		Strongly Agree		Mean	Std. Dev.
	Disagree	Disagree	Disagree	Agree	Agree	Agree		
Item 24	1	3	1	2	1		2.88	1.356
Item 25	0	0	0	6	2		4.25	.463

Pre- and Post-seminar Survey Comparisons

Comparisons were made for the eight participants in the seminar who took both the pretest and the posttest using a paired-samples t-test. Of the twenty-five items, there was a statistically significant difference on item 6, with a mean difference of $M = .875$ and $t(7) = 2.966, p = .021$. This change is particularly meaningful with this group as it directly addressed one of the goals of the seminar. The item stated, “I am confident of the steps necessary in selecting, training, and installing a successor.”

Table 17. Comparisons between pretest and posttest responses using a paired-samples t-test

Paired Items	Mean	N	Std. Deviation	Std. Error Mean
Pair 1 Q1	1.38 ^a	8	.518	.183
PostQ1	1.38 ^a	8	.518	.183
Pair 2 Q2	3.00	8	.926	.327
PostQ2	2.50	8	.926	.327
Pair 3 Q3	3.88	8	.354	.125
PostQ3	4.00	8	.756	.267
Pair 4 Q4	2.50	8	.926	.327
PostQ4	1.75	8	1.035	.366
Pair 5 Q5	4.25	8	.463	.164
PostQ5	4.25	8	.707	.250
Pair 6 Q6	2.75	8	.886	.313
PostQ6	3.63	8	1.061	.375
Pair 7 Q7	2.13	8	1.356	.479
PostQ7	2.00	8	1.069	.378
Pair 8 Q8	4.00	8	.756	.267
PostQ8	3.38	8	1.302	.460

Paired Items	Mean	N	Std. Deviation	Std. Error Mean
Pair 9 Q9	3.50	8	1.309	.463
PostQ9	3.50	8	1.069	.378
Pair 10 Q10	4.00	8	.535	.189
PostQ10	4.13	8	.641	.227
Pair 11 Q11	2.50	8	.756	.267
PostQ11	2.63	8	.916	.324
Pair 12 Q12	3.00	8	1.195	.423
PostQ12	2.75	8	1.282	.453
Pair 13 Q13	3.13	8	1.356	.479
PostQ13	2.88	8	1.458	.515
Pair 14 Q14	2.63	8	.916	.324
PostQ14	2.63	8	1.188	.420
Pair 15 Q15	3.50	8	1.195	.423
PostQ15	3.88	8	1.642	.581
Pair 16 Q16	3.43	7	1.272	.481
PostQ16	3.29	7	1.113	.421
Pair 17 Q17	4.00	8	.926	.327
PostQ17	4.00	8	1.309	.463
Pair 18 Q18	4.13	8	.641	.227
PostQ18	4.13	8	.641	.227
Pair 19 Q19	4.25	8	.463	.164
PostQ19	4.13	8	.354	.125
Pair 20 Q20	4.00	8	.756	.267
PostQ20	3.75	8	.707	.250
Pair 21 Q21	3.63	8	1.408	.498
PostQ21	3.88	8	1.246	.441
Pair 22 Q22	3.25	8	1.035	.366
PostQ22	3.13	8	1.246	.441
Pair 23 Q23	3.75	8	.886	.313
PostQ23	4.25	8	.707	.250
Pair 24 Q24	3.25	8	1.165	.412
PostQ24	2.88	8	1.356	.479
Pair 25 Q25	4.13	8	.641	.227
PostQ25	4.25	8	.463	.164

Seminar Assessment Survey Results

The overall arc of the seminar was designed to follow the preponderance of coaching competencies described by the International Coach Federation (ICF).³ As a means to simplifying the eleven core competencies into a more manageable set of seminar purposes, four readily achievable categories were promoted at the beginning of the seminar: relational, informational, motivational, and practical.

Table 18. Seminar assessment survey items by purpose and ICF competencies⁴

Purpose of seminar component/core competency	Related item from the seminar assessment survey
Relational or establishing trust and coaching presence	(38) I felt valued and “heard” by the facilitator.
	(39) I experienced a collegial atmosphere in the seminar.
Informational or creating awareness, direct communication	(40) The information provided met or exceeded my expectations.
	(41) I left the seminar with a great deal of usable information.
Motivational or designing actions, planning, and goal setting	(42) The seminar reinforced the importance of considering succession in my situation.
	(43) I will take concrete steps in developing a succession plan in my current church.
Practical or managing progress and accountability	(44) I believe there is a productive role for me after I leave my current assignment.

The agenda of the seminar serviced each of the purposes over the course of the day. An hourglass served as the guiding metaphor and structure of the seminar in light of the outlined purposes noted above. Usually, this metaphor is used to describe a coaching conversation having the following characteristics.

³ ICF exists to lead the global advancement of the coaching profession. ICF serves the coaching profession by developing core competencies, establishing a code of ethics and standards, creating a credentialing program, setting training guidelines, and providing focused discussion forums.

⁴ ICF core competencies can be found at <http://www.coachfederation.org/credential/landing.cfm?ItemNumber=2206&navItemNumber=576>.



Establishing trust and intimacy

Exploring topics for consideration through listening, questions, and direct communication

Creating awareness once a focus for the conversation is identified

Designing actions

Planning and goal setting

Figure 1: the seminar as a coaching conversation

By examining the respondents' ratings below, the following narrative description accurately reflects their assessment of the seminar.

Table 19: Distribution of responses for seminar assessment items (8 participants)

Item	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean	Std. Dev.
Item 38	1	0	0	3	4	4.13	1.356
Item 39	1	0	0	2	5	9.25	1.389
Item 40	0	0	0	3	5	9.63	.518
Item 41	0	0	0	4	4	9.50	.535
Item 42	0	0	0	3	5	9.63	.518
Item 43	0	0	0	5	3	9.38	.518
Item 44	0	0	0	4	4	9.50	.535

All but one seminar attendee felt valued and heard by the facilitator and felt a sense of collegiality among the other participants. One attendee strongly disagreed with both statements. All respondents agreed that the information provided was both usable and met or exceeded their expectations. All respondents also agreed that the seminar reinforced the importance of their own succession and they were determined to take concrete steps to develop a plan. Finally, all respondents agreed they would have productive roles in life or leadership upon leaving their current church assignments. In

addition to the survey results, the following unstructured comments were recorded in an essay box at the end of the survey.

Anecdotal Comments Regarding the Seminar

Item 45 in the post-seminar survey simply asked for additional comments from the seminar attendees. Their responses are noted below.

1. I was very thankful for the seminar. It exceeded expectations. I had been working on succession planning. This seminar filled in many gaps, reinforced my thinking and exposed the shortcomings of certain approaches. It also exposed my fears about the future and made me understand the need to include better planning for my own role and identity in “retirement.” That may be more difficult than determining and grooming a successor.
2. Thank you for a great day! Clearly you have a firm grasp on this material. This is a vital topic.
3. The information was insightful and thought provoking. I have served a number of ministries and developed and implemented succession plans in 2 of them successfully. Yet the seminar offered me information, concerns and directions new and useful.
4. This seminar should be offered in every section so more pastors can be involved. The last few hours were rushed since people were concerned about Boston area traffic. Also, this is an important topic for all pastors over 45. Most of the group were over 55 and it is getting a little late to start making plans for the future.

The Project’s Contribution to Ministry

Three streams of research converged in this project on intentional leadership succession: studies in biblical succession, corporate succession, and church succession. The results identify certain key factors common to each research focus.

First, a system of leadership development should be in place within the organization to provide a pool of trained individuals from which assignments for future leadership can be made.

Second, a set of skills, experiences, and character qualities should be used as standards against which future leaders can be compared. As a result of such comparisons, certain gaps in candidates can be identified and, rather than treated punitively, can form the basis for training in order to close the gaps to improve behaviors and performances.

Third, future leaders, internal to the organization, should be paired with the current leader in the form of apprenticeship for a period of time, allowing the transfer of knowledge, culture, and network relationships.

Fourth, successful leadership transitions rest on the efforts and guidance of current leaders. These leaders should champion both the process and person from the earliest days of a succession through the handoff and, if possible, into the near future of the new leader's tenure.

Fifth, succession should be intentional, planned, and managed carefully from start to finish.

In a ministry context, however, there is one more factor that must be part of each transition plan—the guidance and presence of the Holy Spirit. As in numerous examples of successful leadership transitions in Scripture, God chose the person who would follow the current leader. This divine appointment process began in Abraham's family, continued through Joshua to David and many of his descendants. Jesus appointed many to follow Him. Paul did the same. God continues to ask future leaders to steward His

work, whether that stewardship is an extended family, a nation, or an international church.

David McKenna calls such stewardship “The Succession Principle”: A leader builds upon the past, gives momentum to the present, and leaves the promise of greater things to come.⁵ He further clarifies the tripartite principle by adding, “We are inheritors of the past, guardians in the present, and benefactors for the future.”⁶ Christian leaders are not only purveyors of gospel truth, they are representatives and ambassadors of an eternal God whose work extends into the next generations. A leader’s current assignment is only a brief expression of what God intends to do in a given location among a neighborhood, village, or city. Tending the Master’s business means not only faithfulness in the present, but also a careful preparation for the future. This preparation is defined as discipleship, and out of discipleship emerges leaders in the making. These new leaders should be trained to pick up the mantle of leadership with minimal disruption in order to continue the Master’s work in their context.

Conclusion

Henry Venn and Rufus Anderson, two missionary statesmen from the nineteenth century, “articulated the now-famous three-self formula to describe an indigenous church: self-governing, self-supporting, and self-propagating.”⁷ This three-self principle validates the New Testament pattern of planting churches through the training of local

⁵ David L. McKenna, *The Leader’s Legacy* (Newberg, OR: Barclay Press, 2006), 6.

⁶ *Ibid.*, 8.

⁷ John L. Easter, “The Indigenous Church: Advancing Our Missions strategy for the Next 100 Years,” *Enrichment Journal* (Fall 2014): 92-97, accessed November 19, 2015, http://enrichmentjournal.ag.org/201404/201404_086_Indigenous_Church.cfm.

leaders who reproduce themselves, a practice commended to Timothy by Paul in 2 Timothy 2:2. Yet that principle lies inert when laid over many church transitions in the United States. In many cases, the transition process reverts back to an older approach in which missions specialists (judiciary personnel) bring in a series of outsiders to lead the work in cultures not their own.

Intentional leadership succession provides the possibility of a robust culture of self-propagation that sees the progress of the past as a stepping stone for the future led by one trained to take full advantage of the opportunity provided by a humble predecessor.

CHAPTER 5: PROJECT SUMMARY

Introduction

The origins of this project are found in the often tangled root system of a thirty-five-year pastoral journey that spanned six states, eleven churches, and thirteen senior pastors. The relative fruitfulness of such a pastoral career is difficult to quantify. There are projects in binders, sermons in digital and paper form, reams and megabytes of correspondence, and calendars stuffed with dates, times, and deadlines. However, the truest form of remaining fruit rests in Christ-incarnated disciples. Further, to be truly considered a fruit-bearing leader, one must be able to count a healthy number of such disciples as leaders, spawned through direct influence. Leadership succession is best defined as disciples turned leaders, prepared and released to continue the stewardship of influence for another generation. This project attempted to explore and inspire the adoption of such ongoing influence among a select number of working pastors.

This summary includes (1) evaluation of the project, (2) implications of the project, (3) project's contribution to ministry, (4) recommendations for denominational leaders, and (5) recommendations for future study.

Evaluation of the Project

Keys to Project Effectiveness

The publication of the book *Next* by William Vanderbloemen and Warren Bird in 2014 provided a sea of change to church ministry leaders with regard to succession. Until that moment, the topic rested upon a 2004 work by Carolyn Weese and J. Russell

Crabtree entitled *The Elephant in the Boardroom*. For many leaders and churches, the reality of that title continued unabated, especially in smaller churches. However, the work of Leadership Network amidst the burgeoning number of megachurches in the United States provided the necessary statistical heft combined with a growing number of succession narratives to move the topic from the shadows into the full light of day. Quickly, a great number of books filled the vacuum created by years of silence, tumbling over each other in describing the succession process and plans brought to fruition in locations around the world. Most were large church situations, and all of them featured an insider chosen as the successor.

Another landmark publication appeared in a related field of study in 2014. Noel M. Tichy, professor at the Ross School of Business at the University of Michigan, published a book simply titled *Succession*. Tichy worked for over thirty years conducting research, doing countless interviews, and advising corporations and their CEOs around the world regarding the topic of leadership development and succession. His formative concepts were developed in part through his work with Jack Welch in his tenure at GE, where Tichy transformed GE's Leadership Development Center into a standard for building future leaders. Additionally, the work of William Rothwell in his book *Effective Succession Planning*, now in its fourth edition, continues to inform corporate leaders through his careful, systematic approach to succession. The publication's subtitle reveals Rothwell's bias: *Ensuring Leadership Continuity and Building Talent from Within*.

Together, these publications formed the backbone for the robust nature of this project's research phase. In addition, a fine grain examination of biblical succession teased out a fuller expression of what intentional leadership transitions looked like under

God's direction. Conversely, the biblical study included in the project exposed what transition disaster ensued when God's influence was absent.

The field project yielded smaller results than anticipated. However, 49.7 percent of senior pastors over fifty-five in the Southern New England Network participated by completing a twenty-five item survey. The timing of their participation was not optimal, occurring during the fall buildup of activities and new emphasis rollouts common to the season. However, the number of respondents to the survey indicates at least more than a passing interest in the topic of leadership succession. Eight leaders joined together for a six-hour seminar on a Thursday, presenting a challenge for each of them related to the common buildup of study required to give a weekly sermon in their local contexts. Yet they came together. Perhaps twenty-three years of leadership in the district as a senior leader, a presbyter, and a departmental director created a baseline of credibility needed to populate the seminar. In addition, because the facilitator and author of the seminar materials now functions outside the judicatory structure of the network, seminar attendees might have felt more comfortable studying the topic.

Keys to Project Improvement

As stated in chapter 4, a request to expand the survey results across the nation among AG senior pastors over fifty-five was pursued and ultimately failed. This larger pool of responses would have provided a much greater degree of knowledge to the various streams of inquiry than was collected. A topic of this importance and impact on the future of not only the AG network of churches but also many others deserves a wider audience for consideration and discussion.

Additionally, the overall project suffered from time compression as it drew to the field intervention stage, creating an awkward seasonal impact on the final number of seminar participants. A church's calendar reflects two primary seasons for new beginnings—September and January. This project was drawing upon pastoral participation at precisely the same time many of these leaders were engaged in the various levels of post-summer engagement with their congregational priorities. The number of initial survey participants was encouraging. However, when these participants were invited to attend an all-day training and coaching event, the numbers dropped precipitously.

Survey respondents who accepted the invitation to attend the seminar self-selected such participation. It is therefore assumed that those who attended were predisposed to have a higher interest and greater agreement with the possibility of succession in their local contexts. A truly randomized selection of senior leaders might have given a truer picture of opinions than was provided. However, the odds of gathering a group of experienced leaders for a six-hour event without their high interest in the topic would seem to be very low.

A tug of war developed in the seminar design and implementation. Because of the glut of information available and the desire to provide as much information as possible to the seminar participants, time spent in relationship building and narrative sharing at the beginning of the seminar resulted in a loss of momentum for the remainder of the agenda. The highly engaging atmosphere fostered at the beginning of the seminar was sacrificed at the conclusion of the day at the exact stage in the study when a personal plan was expected to be developed by each participant. Sandwiched between those reflective

activities laid layer after layer of information drawn from biblical, corporate, and church succession applications. As the seminar is retrofitted for a wider, nonacademic purpose, the time for relational sharing gained through application of coaching skills will be balanced with a reduced number of examples, lists, and definitions to provide a less hurried agenda. The length of the seminar will, of necessity, be expanded as well.

Implications of the Project

Senior leaders want a safe place to discuss what comes next; for themselves, their churches, and their families. They would like to see their work of building people, organizations, and systems survive their exit and, instead of being abandoned, serve as the foundation of future success for the church in the community. Senior leaders want to know what other people are doing. They want to explore creative funding sources for interns and associate pastors. They hope to develop better systems of identifying potential leaders earlier, a system that rests on a structured process of disciple making. This factor alone discourages the possibility of true apprenticeships to occur.

Not all pastoral transitions can benefit from an intentional succession plan. As stated in *Next*, the average tenure of most US Protestant senior pastors is still only eight years.¹ This number goes up according to the size of the church. However, regardless of the size of congregation, if the tenure of the current pastor accompanies the development of a healthy leadership team who shares a hunger for continued community effectiveness, succession can become the best path to long-term cohesion that yields greater community impact. The current senior pastor is always the key. The priority of the leader must be

¹ Vanderbloemen and Bird, 62.

larger than his or her own career goals. The posture of the leader must embrace the larger future of the church one serves. The plan of the leader must include his or her eventual submission to another who is ready to lead the next chapter of the church's work in the world, hence, the secret to effective and intentional succession. There must be a commitment to leadership identification, engagement, and development.

Again, there must be a safe place to talk about what's next. There must be a system in place to foster and train new leaders. There must be submission on the part of the current leader to promote and make room for the next leader of one's current assignment. Finally, there must be support. Too often, judicatory leaders see a leadership vacancy as a chance to bring in a fresh perspective in order to accomplish goals that might be separate from the church's preferences. Succession plans build around a long-term view through the sponsorship of an existing pastor, thereby shortening the often lengthy period of renegotiation between existing leadership and a new senior pastor. That process is best served through the eyes of an outside consultant, coach, or fellow pastor.

The one statistically significant item from the eight seminar attendee's pre- and post-seminar responses was this: I am confident of the steps necessary in selecting, training, and installing a successor. Prior to an open discussion about what's next, who might fit that definition, and strategies to address succession, this small group of senior leaders lacked confidence. Given the opportunity to discuss various topics openly, that confidence rose to a higher level. The central value of this project could simply be the permission to speak freely.

Recommendations for Denominational Leaders

In my position as a presbyter for over a decade, I have observed that the prevailing work of judicatory officials is crisis management. Pastoral transitions often fall into that category, and certain transitions will always be classified accordingly. However, a broader discussion of the benefits of intentional succession could provide a healthy alternative for many elective transitions. In fact, there is a quantum shift in thinking between a pastor looking for a preaching venue and one who is preparing the church for long-term community impact. Intentional succession is part of that larger vision for local ministry. Frank, open dialogue about intentional plans for succession should be highly leveraged calendar events in annual district planning. However, such dialogue should be conducted by outside agencies or leaders, who have no vested interests in providing new leadership to existing situations.

One of the prevailing concerns for aging pastors is the increasingly gray population of the churches they serve. The question, how do we attract young people, dominates the agendas of board meetings across America. For some churches that have the ability to afford a youth or children's staff pastor, the hope is that the residual effect of such a hire will be the building of a younger following. However, for many congregations, these staff positions do not represent a true commitment to generational handoffs in terms of authority, responsibility, and cultural change. A few more young couples will not be nearly enough foundation to build a new contextual communication with the world around them. Systems, structure, and cultural shifts must accompany the desire for a younger church. Discussions about multigenerational ministry must be routine at every level of national and local leadership. A 2008 publication entitled *We're*

*In This Boat Together*² by Camille Bishop is both an entertaining and informative study of how four generations can work together given the right motivation, desire, and commitment.

There must be a redefinition of staff pastors and interns from transactional hirelings to transformational partners. Too often, younger leaders are given tasks to perform and groups to lead, but they are prevented from the relational warmth and dedication depicted in the interaction of a master with an apprentice. Whether the current pastor is seventy or thirty, every generation that is fifteen to twenty years removed from one's own should become a recruitment and training ground for leadership development and ultimately replacement. A commitment to this multigenerational approach to apprenticeship should be reflected at the highest levels of the movement, not only in isolated tokenism, but also in a pervasive commitment to shared authority.

The work of Vanderbloemen and Bird is largely focused on megachurches. However, the vast majority of churches across the world are small fellowships of committed people struggling to influence their community. Intentional succession can work there as well, but the pool of potential successors must often be found elsewhere. The AG has a long commitment to higher education and to minister development. Perhaps older students or second career students can be identified who would be willing to establish a relationship with a church leadership team and current leader. District schools of ministry are producing an increasingly effective team of trained leaders, often trained in other disciplines, who can use their newfound biblical knowledge to begin a formal internship with a current leader. Another potential pool of possible successors

² Camille F. Bishop, *We're in This Boat Together* (Colorado Springs, CO: Authentic Press, 2008).

might emerge from large churches functioning in the same role as a teaching hospital. Students sign up for a two year paid internship that exposes each of them to mentors, coaches, and ministry opportunities designed to spill them out into profitable ministry at the conclusion of their journey. If a current leader could partner with such a leader in training a year before transition, the results would increase the possibility of a much stronger DNA transfer and smooth organizational handoff.

Finally, the metrics of church success should shift away from nickels, noses, and noise to a simple inquiry regarding the presence or absence of an intentional system of making disciples. Leaders emerge as a subset of the larger pool of disciples. Therefore, a commitment to discipleship must prevail in every local church in order to provide the raw material for future leaders. Jesus typified such a disciple to leader pathway in Luke 22:29-30, “And I confer on you a kingdom, just as my Father conferred one on me, so that you may eat and drink at my table in my kingdom and sit on thrones, judging the twelve tribes of Israel.”

Recommendations for Future Study

One of the casualties of the seminar was the lack of exploration of post-pastoral options. Although three primary works were cited and limited quotations were drawn from each source, an untapped topic of discussion and research should focus on what a pastor does beyond the senior pastor role. The greatest loss of this generational handoff of the Boomers to those who follow them is the vast number of experiences in danger of languishing unexpressed. Tremendous worth could accompany the appropriate partnership between the outgoing and incoming leader. Whether research is done in the form of case studies of recently retired leaders or surveys distributed to all senior

ministers in the AG and other fellowships, the knowledge of how ministry continues or other hobbies are pursued should be codified. Perhaps a district could adopt the goal of capturing this knowledge and serving this population in a more intentional manner, designating a leader and funding the ministry.

Another important area of study rests in identifying the structure and success of various leadership training endeavors that function outside the traditional college and university systems. Programs such as AG district school of missions, Master's Commissions, and others have developed both within and alongside local church ministries. Mining the data of longitudinal effectiveness and placement would be of great value to determine their use as feeders for succession, especially in smaller churches.

Related to this topic, an examination of churches over one thousand in average attendance that might be interested in a more regional impact on smaller churches could yield significant cooperation, again aiding the smooth transition of smaller congregations. The key to such collaborations would be the lack of financial responsibility for the successor while at the same time enjoying a period of shared transfer between the outgoing pastor and the pastor in training. Because both leaders would be in generally the same vicinity, such a relationship would move the familiarity and cultural absorption rate to a much higher point than a more traditional gap between senior leaders. The act of turning an outsider into an insider over the course of six to twelve months while receiving valuable training and support through a sister church could prove invaluable.

Finally, a survey of district and national leaders regarding their attitudes and practices regarding succession topics would serve as an important platform for future actions. A survey of elective church transitions in one or more districts, not related to

forced emergency or morality issues, could also provide much needed data for a more actionable set of recommendations. Conclusions from each of these projects would greatly aid denominational leaders and current church pastors in their quest for best practices.

Conclusion

John the Baptist explained his role as forerunner for Jesus by remarking to a crowd around him, “The friend who attends the bridegroom waits and listens for him, and is full of joy when he hears the bridegroom’s voice. That joy is mine, and it is now complete. He must become greater; I must become less” (John 3:29b-30). Leaders who have “fought the good fight ... finished the race ... kept the faith” (2 Timothy 4:7) are not quite ready to move to their reward. There is yet one more step for them to take. While strength remains, grasp the baton of your leadership and extend it behind you to a new leader, holding on together to that common task until the other’s grip is secure. Then step off the track and cheer your successor to victory.

APPENDIX A: AG LEAD PASTORS REPORTS

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AG CREDENTIALLED LEAD PASTORS BY AGE REPORT 2014
National Totals

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Age	Ordained	Licensed	Certified Ministers	Total
64	240	44	23	307
65	232	43	15	290
66	187	32	23	242
67	181	23	12	216
68	159	31	9	199
69	117	27	11	155
70	122	19	15	156
71	98	26	7	131
72	90	21	5	116
73	88	20	4	112
74	63	14	9	86
75	63	12	5	80
76	40	8	6	54
77	45	7	3	55
78	29	7	3	39
79	35	3	1	39
80	27	4	1	32
81	19	5	2	26
82	19	4	1	24
83	11	3		14
84	22	4		26
85	7	2		9
86	4	2		6
87	6	2		8
88	5	1		6
89	2			2
90	3		1	4
91		1		1
93	1			1
101	1			1
Totals	7,575	2,169	1,251	10,995
Ministers Average Age			54	
Ministers Median Age			55	
Ordained Ministers Average Age			56	
Licensed Ministers Average Age			51	
Certified Ministers Average Age			50	
Ordained Ministers Median Age			56	
Licensed Ministers Median Age			51	
Certified Ministers Median Age			50	

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General Secretary's Office, Statistics

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AG CREDENTIALLED LEAD PASTORS BY AGE REPORT 2014
National Totals

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Age	Ordained	Licensed	Certified Ministers	Total
23		2	1	3
24		3	1	4
25	5	2	3	10
26	1	6	4	11
27	1	11	6	18
28	7	19	9	35
29	15	19	6	40
30	17	16	13	46
31	24	25	6	55
32	28	27	18	73
33	46	41	22	109
34	61	27	14	102
35	65	45	24	134
36	78	49	31	158
37	71	43	26	140
38	82	42	31	155
39	88	49	23	160
40	118	54	24	196
41	105	51	39	195
42	145	60	33	238
43	138	62	37	237
44	150	46	33	229
45	160	62	50	272
46	160	54	43	257
47	164	58	42	264
48	167	43	40	250
49	180	61	39	280
50	221	60	40	321
51	252	69	41	362
52	257	50	38	345
53	251	68	41	360
54	242	52	39	333
55	276	64	43	383
56	257	50	28	335
57	292	77	35	404
58	268	72	39	379
59	260	69	38	367
60	261	59	24	344
61	274	46	30	350
62	238	49	29	316
63	234	42	12	288

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General Secretary's Office, Statistics

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AG LEAD PASTORS BY AGE GROUP 2014
National Totals

Page 178

Age	Ordained	Licensed	Certified Ministers	Total	Percent Of Total
65 And Older	1,676	321	133	2,130	19.4
60 Through 64	1,247	240	118	1,605	14.6
55 Through 59	1,353	332	183	1,868	17.0
50 Through 54	1,223	299	199	1,721	15.7
45 Through 49	831	278	214	1,323	12.0
40 Through 44	656	273	166	1,095	10.0
35 Through 39	384	228	135	747	6.8
30 Through 34	176	136	73	385	3.5
25 Through 29	29	57	28	114	1.0
20 Through 24		5	2	7	.1
19 And Under					
Birthdates Unavail.					
Totals	7,575	2,169	1,251	10,995	

Note: Percentage may not total 100.0 due to rounding.

APPENDIX B: LEADERSHIP SUCCESSION SURVEY

This survey is being presented to you as an instrument in a study addressing attitudes and work for pastoral succession. The study is being done as a portion of the capstone project in a doctoral program at the Assemblies of God Theological Seminary regarding pastoral leadership. The survey participants will be involved in professional church ministry, serving in the role of senior pastor. Your responses will be anonymous, and your participation will only take about fifteen minutes. Thank you in advance for your assistance.

Q1 I have thought about leadership succession in my church or organization.

- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q2 I have a complete understanding of leadership succession.

- Strongly Agree (1)
- Agree (2)
- Neither Agree nor Disagree (3)
- Disagree (4)
- Strongly Disagree (5)

Q3 I am interested in identifying the next leader of the church I serve.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q4 The leaders in the church I serve (elders, deacons, trustees) have talked about succession with me.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q5 I believe the leadership of our church would be open to my guidance in identifying a successor for our church.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q6 I am confident of the steps necessary in selecting, training, and installing a successor.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q7 I am fearful that any discussion of leadership succession will cause the leaders of our church to hasten my departure.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q8 I would like to learn more about leadership succession.

- Strongly Disagree (1)
- Disagree (2)

- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q9 Our system of governance in the Assemblies of God discourages pastoral succession led by the sitting pastor.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q10 I would be willing to take a lesser responsibility in another ministry following the completion of a succession plan.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q11 I would want to stay engaged in the church I currently serve following a succession process.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q12 I have a hobby or interest outside the pastorate that I would love to pursue if I was freed from responsibilities in the church.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q13 I feel confident about my financial plan for retirement.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q14 I have someone in mind for a possible successor in the church I now serve.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q15 A vocational change from the pastorate to another occupation is almost impossible to consider.

- Strongly Disagree (1)
- Disagree (2)
- Somewhat Disagree (3)
- Somewhat Agree (4)
- Agree (5)
- Strongly Agree (6)

Q16 Planning for my future is a frequent practice.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q17 I have spoken with my spouse about leaving the pastorate and what that might mean for our future.

- Strongly Disagree (1)
- Disagree (2)

- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)
- Not Applicable (6)

Q18 I would be happy serving another pastor in a staff role.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q19 I readily embrace change when given enough facts to support it.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q20 I would consider developing a succession plan for my current role given the aid of an experienced guide, consultant, or coach.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q21 I have talked with my peers about leadership succession in the church.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q22 I have read articles and/or books about leadership succession.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q23 I believe it is important to identify the next pastoral leader of the church I serve.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q24 I have a plan for my life after I step down from pastoral responsibilities.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

Q25 If the right “next chapter” opportunity appeared, I would readily embrace change.

- Strongly Disagree (1)
- Disagree (2)
- Neither Agree nor Disagree (3)
- Agree (4)
- Strongly Agree (5)

APPENDIX C: LEADERSHIP SUCCESSION

SURVEY E-MAIL INVITATION

Friday, October 2, 2015 at 4:36:51 PM Eastern Daylight Time

Subject: Southern New England Senior Pastors
Date: Friday, October 2, 2015 at 4:20:08 PM Eastern Daylight Time
From: Randal Smith
To: Randal Smith
Category: Junk

Good Afternoon:

Most of us have met over the past 23 years of ministry here in SNEMN. I served alongside you as a senior leader for 22 of those years in Lynn. I also served as a Presbyter for the NEM section for 10 years. All of that came to a close following a succession process concluding with a transition of leadership at Lifepoint Church (now Grace City Church). I am now a leadership coach for pastors and ministries in a business called Clearpoint Coaching as well as an Executive Coach of CEO's in the Boston area for Convene Corporation.

You have received this email because of your, ahem, age, but also because you serve as a senior pastor in our fellowship. Maybe some of you have thought about who will be next in the church you now pastor but for many of us, that thought really is not considered. The reasons are varied. And I would like to talk to you about some of those reasons. But first, the ask.

The email you have in your inbox is the result of a DMin study at AGTS in Leadership Succession that I am completing. I need your help. First, would you use the link below to take the survey? There are 25 multiple choice questions on various aspects of the topic and I anticipate completion of the survey to be less than 15 minutes. (Several leaders around the country took the survey in a pilot group setting so it has been vetted.)

The second level of help might not be for all of you but I'm hoping a significant amount of you will consider joining me for a six hour meeting with the topic, "A Coach Approach to Leadership Succession." I would like to conduct this meeting on either Thursday, October 15 or 22. We will meet in one of the churches in the north shore of Boston.

Please email me at your earliest convenience about the meeting @ rsmith@clearpointcoaching.com and let me know which Thursday would be optimal for you.

Thank you for participating in the survey below.

Follow this link to the Survey:

[Take the Survey](#)

Or copy and paste the URL below into your internet browser:

https://evangeluniversity.co1.qualtrics.com/SE?SID=SV_d5PC7TqmFqmuCKF&Q_CHL=email&Preview=Survey

Follow the link to opt out of future emails:

[Click here to unsubscribe](#)

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APPENDIX D: LEADERSHIP SUCCESSION

SURVEY FOLLOW-UP EMAIL

Wednesday, October 21, 2015 at 6:54:44 PM Eastern Daylight Time

Subject: Succession Survey and Seminar

Date: Wednesday, October 14, 2015 at 3:39:41 PM Eastern Daylight Time

From: Randal Smith

To: pastorcabral@cox.net

Charles:

Once again, I want to thank you for (almost) completing the survey sent from my evangel.edu account on Leadership Succession. I trust it opened a few areas of thought and prompted some measure of reflection.

As I mentioned in my first emails (and a couple reminders), I am looking for 10 senior leaders who would commit to spend a six hour day in a group coaching and instructional format around the topic of succession. I have a great deal of material to share but I also want to draw from your experiences and observations. Additionally, It will be a time of reflection on your own journey and perhaps an opportunity to ask questions regarding your future. We tried to put together an event for this week, but participation was too limited.

I have carved out two days the first week of November, either Tuesday, November 3 or Thursday, November 5, for this special meeting. It will be held at Christ Revolution Church in Lexington at 451 Lowell Street. We will meet at 8:30 and conclude at 2:30. I will also provide a continental breakfast and lunch.

As a gift for coming to the seminar, I would like to give you a copy of the book, *Next: Pastoral Succession that Works* by William Vanderbloemen and Warren Bird (2014). I will also provide a Starbucks gift card, good for at least a couple beverage runs.

Please consider these opportunities and let me know if you can come to either of the two seminar days.

Thanks, Charles.

Randal E. Smith | Leadership Coach
Powerful Questions | Quality Decisions | Clear Direction



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Visit our website: <http://www.clearpointcoaching.com>

APPENDIX E: LEADERSHIP SUCCESSION

SEMINAR PHILOSOPHY



Establishing trust and intimacy

Exploring topics for consideration through listening, questions, and direct communication

Creating awareness once a focus for the conversation is identified

Designing actions

Planning and goal setting

APPENDIX F: LEADERSHIP SUCCESSION SEMINAR

A COACH APPROACH TO
LEADERSHIP SUCCESSION

Presented in Partial Fulfillment
of the
Doctor of Ministry Degree
from the
Assemblies of God Theological Seminary

by
Randal E. Smith
Thursday, November 5, 2015

Christ Revolution Church
451 Lowell St
Lexington, MA
Pastor Brent Maracle

Meeting Agenda

- 8:30 am **Refreshments, Greetings, and Prayer**
- Distribute gifts
- 9:00 **Who We Are and Why We're Here**
- Purpose of the meeting
 - Participants' introductions
 - Participants' succession stories
- 10:00 **Succession in General and Specifics**
- Defining the terms
 - Four types of succession
 - Reasons for resistance to succession
 - How do we know it's time?
- 10:15 Break
- 10:30 **Biblical Succession**
- A brief survey
 - Three prominent biblical examples of leadership succession
 - Common biblical themes of succession
- 11:30 **Corporate Succession**
- Competencies and values
 - Insider vs. outsider
- 12:00 pm Lunch Break
- 12:30 **Church Models of Succession**
- Internal candidates
 - The need for pervasive leadership development
 - Competencies
- 1:30 **Succession and You**
- Two models of change management
 - Your encore life ... halftime ... third third
 - A third third journey
 - The big finish
- 2:20 **Final Steps**
- Complete online survey 2.0 (remember to fill in the second block of 7 questions below the first 25!)
 - Introduce Clearpoint Coaching
 - Thanks and benediction

Purposes of the Meeting

To hear one another's stories and encourage one another

To gather facts, best practices, and strategies for succession

To give permission to adopt succession in one's personal setting

To provide the tools to dream a preferred, detailed future

Participants' Introductions

Our Stories, Round One

Please make a note of the following information in your verbal introduction. 4 minutes!

Age (do not lie - much) _____

Family _____

Years in ministry/where/doing what _____

Sketch of current ministry

Participants' Succession Stories

Our Stories, Round Two

Describe succession events you have observed or participated in (if applicable).

As a senior pastor

As an associate pastor

As a board member

Describe your predecessor in your current assignment (if applicable).

What brings you here today? What do you want to achieve today?

Defining the Terms

Apostolic succession, Royal succession, Presidential succession

CEO succession: "the process that helps ensure the stability of tenure of personnel ... that helps ensure the continued effective performance of an organization ... by making

provision for the development, replacement, and strategic application of key people over time,”¹

“a structured process involving the identification and preparation of a potential successor to assume a new role,”² or

“a dynamic process of aligning employee aspirations and talents with the constantly evolving needs of the organization and of providing employees with the resources and support they need to grow into new roles.”³

Pastoral succession: “A healthy pastoral transition is one that 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.”⁴

Q What are the key thoughts in definition 1?

Pastoral succession “is the intentional process of the transfer of leadership, power, and authority from one directional leader to another.”⁵

Q What are the key thoughts in definition 2?

Beer truck test: What happens if your current pastor is hit by a beer truck?

Envelope in the drawer: Usually reserved for a successor from his predecessor, but also used for a name suggested by the leader lying on the street after a beer truck drives by.

Replacement Planning: When a senior leader announces he/she is leaving or a board decides to ask for a resignation or a firing occurs, an exit plan is developed, help is solicited, names and resumes are collected, interviews conducted, and a candidate or candidates try out.

Q What is the difference between replacement planning and succession planning?

Q How many of us have been part of replacements? Successions? From an initial vantage point which has more advantages for a church?

¹ William J. Rothwell, *Effective Succession Planning*, 3rd ed. (New York: AMACOM, 2005), 5.

² Andrew Garman, and Jeremy Glawe, “Succession Planning,” *Consulting Psychology Journal: Practice and Research*, 56, no. 2 (Spring 2004): 119

³ David Clutterbuck, *The Talent Wave* (Philadelphia: KoganPage, 2012), 11.

⁴ Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom* (San Francisco: Jossey-Bass, 2004), 41.

⁵ William Vanderbloemen, and Warren Bird, *Next* (Grand Rapids, MI: Baker Books, 2014), 10.

Four Types of Succession

On page 12 of *Next*, three types of succession are listed.

1. _____ :
death, health issues, crises
2. _____ :
moral failure, doctrinal heresy, disability
3. _____ :
terminations
4. _____ :
transitions (successions), rotation, retirement

Reasons for Resistance to Succession

Table 20: Factors for resisting succession or transition

<i>Resistance Factors</i>	<i>Descriptions</i>
Insufficient funds	Lack of necessary or perceived need for retirement funds
Lost identity ⁶	No clear understanding of place and purpose in retirement
Fear	Becoming a lame duck leader until one leaves
Ignorance	Unsure about process or even where to start
Lost momentum	Concern for church's welfare in and after a transition
Threat and intimidation	Process seems personal and harmful to self and family
Anxiety ⁷	Concern over loss of power, privileges, and status
Ownership	Considers the church and its success, mine
Current identity	The job defines the leader, "This is what I do, who I am."
Capacity	Strength remains to continue ministry
Pride ⁸	Thinks no one can lead the church like he or she can
God's sovereignty ⁹	Any transition plan is a presumption on God's will

⁶ Gary L. Johnson, *LeaderShift* (Self published, 2013), 153.

⁷ John Finkelde, *Next!* (Self published, 2014), 142-147, Kindle.

⁸ Tom Mullins, *Passing the Leadership Baton* (Nashville, TN: Thomas Nelson, 2015), 38-46.

⁹ Bob Russell, and Bryan Bucher, *Transition Plan* (Louisville, KY: Minister's Plan, 2010), 18.

Q List your three top reservations to succession. Care to share?

How Do We Know It's Time?

- Older leaders fail to inspire younger people.
- Older leaders lose energy and imagination as they age.
- A desire to retool and a thirst for learning begins to fade.
- A sense of urgency wanes and energy is depleted.
- Vision for a new future grows stale and dated.
- A willingness to change and adapt grow more difficult to achieve.¹⁰

Biblical Succession

Q What is the difference between discipleship and succession?
Matthew 28:19-20 vs. 2 Timothy 2:2; John 17

Q What qualities do they share?

Q How accurate is the oft quoted phrase, "Everything rises and falls on leadership"?

A Brief Survey

As we proceed through these passages and stories from Scripture, the constant question we must ask ourselves is, how does this apply to our contemporary context?

Q What did succession look like in the days of the patriarchs? What was the overarching impact of Abraham's influence supposed to be? (Should our churches have this kind of overarching impact that is bigger than the current leader and generation?)

Q Is there a lesson somewhere tucked away in the fact Joseph led from the second chair? This is the lesson of Nehemiah as well. (Is it possible to exert influence from this chair for us in the future?)

Q In the time of Judges, what was the predominant form of succession? What Scripture gives us a clue about the reasons for failure to sustain leadership hand offs? (How does doing our own thing extend to local boards, pastors, and district officials?)

Q What are the similarities regarding succession in the lives of Eli, Samuel, and Saul? (Generational influence does not just apply to our kids, but our kids in the faith. What is our track record of success in this arena?)

The history of the monarchs in Israel following Solomon is coarsely divided into two differing practices regarding succession. In Judah, David's line relied on 2 Samuel 7:16. *"Your house and your kingdom will endure forever before me; your throne will be*

¹⁰ Johnson, 23.

established forever.” In Israel, more often than not, assassination was used as a blunt instrument against sustained royal succession with a few notable exceptions. (How much like an assassination is the act of starting over with every new pastor that is voted into our churches?)

Q What unique learning can we take away from the limited verses related to the handoff from Elijah to Elisha in 1 Kings 19:16-21 and 2 Kings 2:1-11?

Q As we think about Jesus’ choice of the disciples, His influence in their lives, and His early departure, what was His purpose in developing this cadre of men (and women)?

Q What lessons about succession are evident in Peter, Phillip, John, and James that we can apply? What do you think they understood their mandate to be based on the limited scriptural evidence we have in the book of Acts? (This question takes us back to the differences between discipleship and leadership at the beginning of this biblical review.)

Three Prominent Biblical Examples of Leadership Succession

Group Activity: Using the following biblical passages and categories, describe the succession elements in each relationship. In each story, attempt to address the following topics. *God’s role, what was being transferred, length of relationship, learning assignments of successor, symbols of transfer, public ceremonies/activities, special charges to the successor.*

MOSES AND JOSHUA

Joshua’s various roles in Israel: Exodus 17; 24:13; 32:17; 33:11; Numbers 11:28-29; 13

Joshua’s appointment and commissioning: Num. 27:15-23; Deut. 3:21-22; 28; 31:1-29

DAVID AND SOLOMON

Succession story One: 1 Kings 1

Succession story Two: 1 Chronicles 28-29

PAUL AND TIMOTHY

Timothy in the book of Acts: 16:1-3; 17:14-15; 18:5; 19:22; 20:4

Timothy referred to as a son: Phil. 2:22; 1 Tim. 1:2, 19; 2 Tim. 1:2; 2:1; 3:10-11

Paul sends Timothy to four cities: 1 Thess. 2:17-3:10; 1 Cor. 4:16-17; 16:10-11; Phil. 2:19-24; Ephesus in 1 Timothy

Succession Mandates: Guard 1 Tim. 6:20; Entrust 2 Tim. 2:2; Handle 2 Tim. 2:15; Courage 2 Tim. 1:6-8; Endure 2 Tim. 2:3+; Embody 1 Tim. 4:12; Summary: 2 Tim. 4:2-5

Common Biblical Themes of Succession

1. Each outgoing leader received a _____ to leadership.
2. Each relationship between outgoing and incoming was _____
3. Each leader shared a strong _____ with God.
4. Each successor was _____ publicly.
5. The word _____ describes at least two relationships.
6. The qualities of _____ and _____ defined God's charge to each.
7. _____
8. _____
9. _____

Corporate Succession

In medium to large corporations that feature a board of directors and CEO, what value could that structure provide in an examination of church leadership structure as it relates to succession?

In family run businesses, what value could that structure provide in an examination of church leadership structure as it relates to succession?

In a non-profit (501C3), what value could that structure provide in an examination of church leadership structure as it relates to succession?

Surprisingly, CEO succession, although highly studied, is not working.

The CEO Succession process is broken. Many companies have no meaningful succession plans and few of the ones that do are happy with them. CEO tenure is shrinking, in fact, two out of five CEO's fail in their first 18 months. It isn't just that more CEO's are being replaced; it's that they're being replaced badly. The problems extend to every aspect of CEO succession: internal development programs, board supervision, and outside recruitment."¹¹

Further, in three separate surveys, one conducted by a conference board of general counsels, another by an executive search firm, and a third by the National Association of Directors, the results reflected the above observations. One study found that _____ percent of companies surveyed had no formal succession plan in place, another _____ percent, and the third recorded that only _____ percent disclosed the existence of an existing plan.¹²

Three humorous models used in many firms:

1. The test tube process of succession.

2. The blindfold parking process.

3. The horse race process.

Ideally, "a CEO transition involves far more than the transfer of power and responsibility from one CEO to the next. It is rather a systematic, pivotal inflection point in the history of the organization that involves three interrelated domains including the *individual*, the *organization*, and the *senior management team*—each requiring a thorough, well planned, and integrated approach ... with the intent of ensuring business continuity and organizational success."¹³

¹¹ Ram Charan, "Ending the CEO Succession Crisis," *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 125.

¹² Tichy, 30.

¹³ *Ibid.*, 182.

Table 21. A blended list of best practices with descriptors¹⁴

<i>Best Practice</i>	<i>Descriptor</i>
	Determine the current viability and descriptions of each leadership position
	Match both general and specific competencies to those positions
	Find high performing, high capacity candidates by using consistent, objective criteria
	Assess each candidate's strengths and weaknesses compared to the org.'s needs
	Design individual development plans for each candidate to narrow competency gaps
	Provide coaching, varied tasks/roles, and training opportunities to close gaps
	Measure progress through interviews, 360's, performance criteria, and self reports

Competencies and Values

“It is just not enough to make people good performers. They must be ethical as well and possess a moral dimension that is consistent with the image the organization wishes to purvey. Lacking values, high potentials cannot be successful in the long term and cannot bring credit to the organization.¹⁵

One author suggested the acronym, T.A.S.K. to describe the range of competencies needed.

_____	innate abilities that someone performs naturally and easily
_____	natural talents that require further development and training to completely flourish
_____	learned behaviors developed over time with experience
_____	information needed to perform a task or job effectively

Other general competencies that are essential to potential leaders include integrity and honesty, interpersonal skills, oral and written communications, results orientation, business and financial acumen, technical knowledge, team builder, and change agent.¹⁶

Warren Buffett blends his hiring criteria into just three categories:

1. _____
2. _____
3. _____

¹⁴ Rothwell, 31-32.

¹⁵ Ibid., 91.

¹⁶ Wanda Pina-Ramirez and Norma Davila, *Passing the Torch* (Alexandria, VA: ATD Press, 2015), 74.

Implicit in a discussion of competencies and the resultant leadership development plan designed to build these competencies into future leaders is a bias toward internal candidates rather than external candidates. Although a blended list of desired competencies can be laid over an outside candidate's interviews, references, and observations, nothing replaces the in-depth knowledge of such competencies present or absent in a member of one's organization.

The literature defines these groups of internal candidates as _____, _____, or a _____.

Central to the leadership development plan of a succession management system is the opportunity for observation, training, coaching, and assessing over time. Such close examination often emerges from the creation of an individual development plan (IDP).

Table 22. Alternative strategies for leadership development¹⁷

Who-Based Strategies	Pair up leaders with individuals who have special talents worthy of emulation
What-Based Strategies	Give leaders exposure to specific types of experiences that require desired functions/skills
When-Based Strategies	Give leaders exposure to time pressure in task assignments
Where-Based Strategies	Give leaders exposure to special locations or cultures that broaden perspective
Why-Based Strategies	Give leaders exposure to mission-driven change efforts
How-Based Strategies	Furnish leaders with in depth knowledge of their specific growth arenas

Insider vs. Outside

What is the value of choosing a successor from within an organization?

What would be reasons to choose someone from outside an organization?

Both insider and outsider CEOs have strengths and weaknesses when they begin. Insiders know the company and its people, but are often blind to the need for radical change—they've drunk the Kool-Aid. Outsiders see the need for a new approach, but can't foster change because they don't know the company or industry sector well enough. What organizations need, then, is to find a way to nurture what I call *inside-outsiders*—that is, internal candidates who have outside perspective.¹⁸

How could these preferences be applied to our churches? What are the barriers to doing so?

¹⁷ Rothwell, 244, 250-251.

¹⁸ Joseph L. Bower, "Solve the Succession Crisis by Growing Inside-Outside Leaders," *Harvard Business Review on CEO Succession* (Boston: Harvard Business Review, 2009), 155.

Summary

What are your primary takeaways from this brief study of corporate succession?

How can these be applied to church leadership succession? Should they?

Church Models of Succession

Jack Welch said, “Before you become a leader, success is all about growing yourself. After you become a leader, success is about growing others. Every leader has a responsibility to develop those who can move the organization forward.”¹⁹

Do you disagree or agree? Why?

Similar sentiments

David McKenna (former Christian college president): “We cannot lose sight of our primary task. It is to develop mature disciples who are ready to step into the role of leadership Our legacy will be written not in the good things that we have done as Christian leaders, but in the greater things that our successor will do.”²⁰

John Maxwell: “Of all the laws of leadership, the Law of Legacy is the one that the fewest leaders seem to learn. Achievement comes to someone when he is able to do great things for himself. Success comes when he empowers followers to do great things with him. Significance comes when he develops leaders to do great things for him. But a legacy is created only when a person puts his organization into the position to do great things without him.”²¹

How do you look at your legacy in your current situation?

¹⁹ Chand and Bonner, 63.

²⁰ McKenna, 121, 123.

²¹ Gary L. Johnson, *Leadership Shift* (self-published, 2013), 169.

Table 23: Two succession plan templates

<i>Three Stage Plan</i> ²²	<i>Description</i>	<i>Four Stage Plan</i> ²³	<i>Description</i>
What needs to be in place?	Recognizing church identity		Outgoing pastor examines his future and needs of the church
Who will lead?	Gifts/credentials/calling		Discussion begins with leadership team and family
When and how will transition happen?	2 models: internal apprenticeship, external calling		Refine a plan in prayer
			Carry out the transition of outgoing and incoming leaders

What is your role in the church?

Vanderbloemen and Bird list four types of leaders based on two axes. Look at page 73 of your book.

Which culture does your church most resemble?

Internal Candidates

Resumes, degrees, interviews, ordination papers, references, and trial sermons may tell us some things about a potential candidate for the ministry. But when it comes to really understanding that candidate—his character, work habits, personality traits, and family relationships—there is no substitute for working alongside that person over a period of time.²⁴

Tom Mullins calls this, “raising spiritual sons (and daughters).”²⁵

Naomi Dowdy says the best successor is someone that is the product of a process that is “intentional and homegrown.”²⁶

Advantages of internal candidates are that you both already have a sense that the chemistry is a good fit. They already understand a bit about your church’s DNA and your community. They have already developed some degree of trust and respect among the

²² Lescalleet, 2351-2538, Kindle.

²³ Chand and Bonner, 10-11.

²⁴ Russell and Bucher, 52.

²⁵ Mullins, 93.

²⁶ Dowdy, 28.

congregation. They know the family and the systems that run it, and their transplanting into the body will have a much higher probability of being a good “tissue match.”²⁷

As you consider your past associations, are there people who most clearly fit the definition of a successor?

The Need for Pervasive Leadership Development

Three Requirements

1. Long

2. Adequate

3. A senior leader who

What has been your practice in leadership development?

What barriers or obstacles have or do prevent you from installing such a process in your church’s culture?

Competencies

As illustrated in the section on CEO succession practices, church leaders have their own suggested lists.

Bill Hybels:

Tom Mullins adds:

Greg Johnson:

²⁷ Vanderbloemen and Bird, 149.

How often do we use these kinds of competencies in talking with potential leaders? Why or why not?

How the book *Next* can help you.

Succession and You

Two Models of Change Management

William Bridges wrote a seminal work called *Managing Transitions* in which he describes the three phases of transition.

- _____ —of the old reality and the old identity.
Transition starts with an ending.
- _____ —an uncomfortable stage where repatterning and
adjustments are needed
- _____ —a new identity is developed, leading to new
energy and a sense of purpose²⁸

How ready are you for the changes required in an intentional succession process and plan?

Who have you talked to about the future of the congregation you serve in light of your own future?

John Kotter lists eight steps in his change model. I have blended a church succession process together with his stages.

9. Establishing a sense of

There is no greater urgency than entering the unknown waters of personal and corporate leadership transitions, especially if the exiting leader is moving into another profession or retirement.

10. Creating the guiding

The wise pastor surrounds him- or herself not only with a trusted board, but also a family who is fully informed and an outside consultant or coach who not only listens to the participants, but also helps guide the process.

11. Developing a vision and

This is the heart of succession—the succession plan. It includes the timeline, successor's developmental plan, benchmarks, and expectations for the handoff. It also

²⁸ William Bridges, *Managing Transitions*, 3rd ed. (Philadelphia: Da Capo Press, 2009), 4-9.

should include an integration plan for the new leader's first one hundred days in his or her new role.

12. Communicating the change

Who knows what when. The ripple effect of family, executive board, staff, ministry leaders, and eventually the entire church should be carefully orchestrated to answer questions in the proper timing to achieve maximum buy in and clarity.

13. Empowering broad based

This stage allows for hard choices, new initiatives, and fresh approaches to ministry agreed to by both incoming and outgoing leaders that protects the new leader from the need for immediate changes.

14. Generating short-term

Shared preaching schedules, shifts in board management, staff leadership, vision and mission tweaks, and ministry staffing adjustments all fall into these incremental changes taking place before handoff.

15. Consolidating _____ and producing more

The adjustments become larger as one leader increases and the other decreases.

16. Anchoring new approaches in the _____

All changes should be accomplished many weeks ahead of the actual transfer of leadership in order to set the stage for a grand celebration of the predecessor and the inauguration of his or her successor.

Vanderbloemen and Bird suggest the following process, their ten commandments of succession on pages 33-36.

1. Read the book with others
2. Set a healthy pace for the long run
3. Prepare an emergency envelope (the beer truck test)
4. Develop a plan for a nonemergency but unforeseen departure
5. Anticipate your (eventual) retirement
6. Annually evaluate the state of your succession plan
7. Create a broad culture of leadership development
8. Share the teaching
9. Share the leading
10. Look beyond the baton pass

Your Encore Life ... Halftime ... Third Third

“The Encore stage ... is characterized by confluence over reinvention, by the weaving together of accumulated skills, insights, perspective, and experiences into a new amalgam The end result promises to be a windfall of talent.”²⁹

“The latest neuroscience research shows that some things improve as we pack on the years. We become more empathic, we get better at synthesizing ideas, making connections between disparate ideas and solving complex problems ... we may forget where we put the keys, but we may be able to settle a major labor dispute.”³⁰

How much time and effort have you spent on what’s next?

Bob Buford, author of several books using the phrase “halftime,” talks about these years in terms of moving from success to significance. The score card is no longer money, fame, power, (church attendance or income). Instead it’s about internal scoring such as satisfaction and influence—the ability to make an impact on others through service.

A Third Third Journey

Looking Back...

At our experiences that shaped us

At the people that influenced us

At the roles we’ve played

At the gifts, passions, and values that have weathered time

Shape these items in a brief reflective paragraph

What have you enjoyed most in your career? Least?

What do you look forward to when you get out of bed in the morning? What gives you energy?

How has this changed over the years?

Is there a passion, skill, hobby, or special interest that you have thought about turning into a new career?

²⁹ Marc Freedman, *The Big Shift* (New York: Public Affairs, 2011), 170.

³⁰ Marci Alboher, *The Encore Career Handbook* (New York: Workman, 2013), 3.

What are the causes of fear and anxiety as you think of the transition ahead of you? How have you seen God address similar concerns in your past?

What dreams continue to push through your everyday life that might be calling for attention? How long have you experienced the same themes?

Who is part of your social network or family network? Is there anyone that you would like to work with in the future? Live around? Work for? Has there been any conversation with them about the possibilities?

How important are family and friends in this third third?

If you are married, what is your spouse's plans and dreams for his or her next stage in life? Where do the two plans intersect or diverge?

Encore careers may be full-time or part-time, paid or volunteer. They may be in organized endeavors or entrepreneurial initiatives. They may utilize accumulated experience or emerge from new learning. The key is passion—the meaning that gets us up in the morning and defines our day, the energy that demonstrates life and communicates love. Encore careers are about calling and contribution. They may generate income, but their worth is measured by satisfaction and significance.³¹

Who is now looking to you as a mentor, a teacher, an encourager?

The Big Finish

Based on the topics we have covered in this seminar and your reflections in the last section, address the question of succession and the next stage of your life in the following space. Give yourself permission to dream, make assumptions, think bigger than anyone around you would dare to allow. Use “I will” and “We will” rather than “if the stars align just right”. Answer some or all of the following questions:

When could a succession plan start to take shape?

What are the first few steps?

Who might be in my past or present sphere of influence that could follow me?

Who can I talk to about people that would fit in our church when I begin to consider succession?

What are the financial ramifications?

What would you do after leaving?

Where would that happen?

Who would you work with or for?

What would be your dream encore career and why?

³¹ Walter C. Wright, *The Third Third of Life* (Downers Grove, IL: IVP, 2012), 75.

APPENDIX G: SUPPLEMENTAL LEADERSHIP

SUCCESSION SURVEY QUESTIONS

Q37 Seminar Assessment. In this final section, we would like your assessment of the seminar and its impact on your thinking about succession and succession planning.

Q38 I felt valued and heard by the facilitator.

- Strong Disagree (1)
- Disagree (2)
- Neither Disagree or Agree (3)
- Agree (4)
- Strongly Agree (5)

Q39 I experienced a collegial atmosphere in the seminar.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q40 The information provided met or exceeded my expectations.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q41 I left the seminar with a great deal of usable information.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q42 The seminar reinforced the importance of considering succession in my situation.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q43 I will take concrete steps in developing a succession plan in my current church.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q44 I believe there is a productive role for me after I leave my current assignment.

- Strongly Disagree (6)
- Disagree (7)
- Neither Agree nor Disagree (8)
- Agree (9)
- Strongly Agree (10)

Q45 Additional Comments?

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