

***OVERVIEW OF PASTORAL
TRANSITION PROCESS
FOR CONGREGATIONS***

***GREATER NJ ANNUAL CONFERENCE
OF
THE UNITED METHODIST CHURCH***

2014

Table of Contents

Cover	
Table of Contents	1
Transition Workshop Discoveries	2
Agenda	3 - 4
Pastoral Transition Process for Congregations	5
Steps In The Transition Process	6 - 9
Six Stages in Engaging the Transition	10 - 11
Transitioning Out	12 - 13
Leave Taking	14 - 15
Start up (New Pastor)	16 - 17
Entering Into a New Ministry (Bishop Schol)	18 - 19
List of Resources	20
Appointment Quarterly Evaluation	21 -22
INFO-PAK	23
Pastoral Transition Audit	24 - 25
Chat Topics	26
A History Sharing Experience	27
Special Services	28

Greater New Jersey Annual Conference
The United Methodist Church
2014 Transition Workshop

1. What particularly helpful information and insights have you gained in the workshop?
 - a. From the handout:
 - b. From the speakers:
 - c. From our table discussion:
 - d. From your own reflection:

2. What do I commit to share in my local church?
 - a. In our transition team:
 - b. In the larger congregation:
 - c. With my current pastor:
 - d. With our incoming pastor:

Greater New Jersey Annual Conference
Transition Workshop Agenda
April 7, 2014 / May 3, 2014

- 9:30 AM Registration & Fellowship
- 10:00 AM Welcome & Opening Prayer Bishop John Schol
- 10:05 AM Outline of the Day & Necessary Information
- 10:10 AM Effective Transition
 Theology and Philosophy of Change vs. Transition
 Transition in the Itinerant System
 Reflection and Planning Facilitate Effective Transitions
- 11:10 AM “Transition Is A Team Effort –Engaged in 6 Stages”
 Transition begins with the appointment process
 The Role of the Team
- 11:30 AM Planning For Effective Transition Out
 Departing Pastor’s Role (Leave Taking)
 Congregation’s Role (Grace-filled send-off)
 Saying Goodbye (Coming to closure, preparing for the future)
 Practices (For returning to a previous appointment)
- 12:00 PM Lunch and *Team Discussion (church team and current pastor)*
 What will your team do to prepare for an effective transition?
 What church issues need to be followed closely during the transition?
 (financial, concerns, legal issues, congregational needs)
 Are there parsonage issues to be addressed prior to the new pastor’s arrival?
 Are there church office or pastor’s office issues that need to be addressed?
- 1:00 Entering Into a new ministry Bishop John R. Schol
 Identifying and understanding expectations
 Clarifying appropriate expectations
 One to one meetings
 Small group house meetings
 Periodic Check-ins
 Team Discussion with church and new pastor
 Who are the key elected leaders and perceived leaders that the pastor
 should meet with?
 Who will arrange for the small group house meetings?
 How many one to one meetings are appropriate for your church?

Pastoral Transition Process for Congregations

Introduction

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

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

The Cabinet is requesting all congregations that will have a change of pastors in 2014 to participate in a Pastoral Transition Process in order to:

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

Developing a Transition Team

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

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

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

Steps in the Transition

1. Consultation Process with the SPRC

The transition began last fall when your church submitted its Church Profile for Ministry. That profile should be updated every year. This process continues when the D. S. meets with the SPRC and visits for the Church Conference. This process may include an opportunity for the congregation to provide feedback to the PPRC.

2. Introduction Process For A Transition Into a New Appointment

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

11. The DS asks the incoming pastor to close the process with prayer.
- k. The D. S. texts or emails the bishop to inform him/her of the results of the meeting.
- l. The D. S. sends the SPRC Chair the announcement to be shared with the church.
- m. An Appointment Memo and Missional Appointment Letter are sent to the pastor and SPRC Chair, documenting details of the change of appointment.
- n. D. S. submits a Change of Appointment form.
- o. An announcement is made on the conference website announcing the appointment.

3. **Exiting Process**

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

4. **Pastoral Transition Workshop for the Team**

This workshop will introduce the team and incoming pastor to phases of a pastoral transition, assist the team to develop an appropriate strategy, introduce resources that can be used to implement that strategy, and begin to develop benchmarks, a time line, responsibilities and an evaluation process. The Transition Workshops will be April 7 and May 3, 2014 at St. John's UMC in Hazlet, NJ

5. **Transition Planning**

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

6. **Exit Interview with Departing Pastor**

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

7. **Preparation for Entry / Startup with Incoming Pastor**

It is recommended that the team meet with the incoming pastor in the spring. This is a time to share transition plans that involve the new pastor, begin a team building process, identify the congregation's priorities for pastoral leadership during the early months, introduce a ministry planning and review process for assessing ongoing needs and

leadership roles. Establish benchmarks for ministry and a time-line for reaching them. A variety of startup options for use by the team will be shared during the training.

8. Upgrading Pastoral Leadership Skills

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

9. Upgrading Congregational Skills

The SPRC, Incoming Pastor and D. S. consult regarding needed training that will enhance the congregations skills in order to achieve the benchmarks of ministry that have been established. A plan to develop clergy excellence will be formulated.

Establishing a Ministry Covenant

A covenant shall be established by mutual agreement of the Church, the Incoming Pastor and the District Superintendent as soon as possible after the appointment is announced, and in all cases prior to Annual Conference. The Ministry Covenant includes:

- a. The District Superintendent's expectations of the pastor and church
- b. Defined benchmarks for achieving specific priority goals
- c. Timelines for achieving said goals
- d. Expectations of the church and pastor for developing a greater level of skills to empower achievement of the stated goals
- e. A plan for developing pastoral and congregational skills
- f. A timeline for evaluating the activities of the pastor and the church
- g. Assistance that will be provided through the office of the District Superintendent. The discussion starting point is the Appointment Memo

Note: The District Superintendent shall approve a process whereby details of Memo and any Ministry Covenants are worked out, as soon as is practical after the appointment is announced. There will be a 3, 6, 9, 12, 18 month evaluation of the ministry.

10. The Appointment Memo Is a Valuable Tool

An Appointment Memo and Appointment Letter are created by the District Superintendent and it is delivered to the Church and the Pastor. It will include:

- a. Identification of the specific appointment
- b. The starting date of the appointment
- c. The complete compensation package, including insurance, pension, expense allotments, fringe benefits, reimbursable expenses and other details
- d. Housing arrangements
- e. Vacation policies
- f. Moving dates, expenses and policies
- g. Expectations regarding availability and condition of any parsonages
- h. Specific appointment expectations are in the written Memo and Appointment letter

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

An opportunity is provided for evaluation, to focus on a feedback process that assesses the accomplishments of the benchmarks in relation to established timelines. The evaluation is based on an assessment regarding meeting the expectations stated in the Appointment Memo. The evaluation identifies current issues that should be addressed by the lay and clergy leadership.

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

Six Stages In Engaging Transition

- 1. Leave**
 - a. Saying goodbye
 - b. Coming to closure
- 2. Entry**
 - a. Arrival of new pastor
 - b. Physical move
 - c. Psychological move
 - d. Becoming part of the church
- 3. Start-up**
 - a. Learning the system
 - b. Understanding roles
- 4. Mutual Testing**
 - a. Working to develop trust
- 5. Mutual Acceptance**
 - a. Crossing the inclusion barrier
- 6. Job/Role Planning**
 - a. A ministry of partnership begins at this point

1 - Leave Taking (exiting Pastor):

To provide for change in pastoral leadership in ways which strengthen the local church and provide an open and accepting climate.

1. Prepare to disengage and let go.
2. Acknowledge and work through grief
3. Prepare for a successor
4. Help successor enter (with a minimum of surprises)
5. Help the church prepare for a new pastor
6. Celebrate the continuity of the church and its ministry

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

2 - Entry (new Pastor):

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

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

3 - Start-up:

Help the new pastor to locate his/her place in the church and clarify initial problems needing attention.

1. Select an appropriate and compatible management style among a range of options
2. Define initial responsibilities
3. Select management procedures
4. Identify major issues
5. Make the transition from the former pastor
6. Allow time for input

4 - Mutual Testing:

Learn to work effectively in the new pastoral relationship.

1. Mastering job basics in the new situation
2. Building mutually supportive relationships
3. Building a new frame of reference
4. Mapping the players and the networks
5. Locating ourselves in the networks
6. Learning the vernacular
7. Accessing organizational functioning

5 - Mutual Acceptance:

Pastor and congregation will move toward the realization of shared ministry and common life.

1. Crossing the inclusion boundary
2. Crossing the authority boundary
3. Accepting the congregation, quirks and all – Accepting the pastor quirks and all
4. Negotiate, evaluate, and re-negotiate mutual expectations
5. Dealing with resistance

6 - Job/Role Planning:

Develop the local church as a vital and effective instrument of ministry and mission.

1. Building a common vision of a desired future for this local church
2. Clarifying work responsibilities
3. Selecting the key result areas, including benchmarks and timelines
4. Clarifying priorities
5. Building a plan of operation
6. Providing for strategic Planning
7. Building support systems around innovators

Bold Thoughts In Planning For Effective Transitioning Out

Leave Taking:

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

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

- a. Exhibiting hospitality and a welcoming spirit in receiving your successor
- b. Gathering all the materials needed for a new pastor's entry into the church
- c. Take the initiative to set up the transition meetings
- d. Helping to introduce the new pastor to key leaders in the church
- e. Working out move dates and other calendar issues cooperatively
- f. Sharing knowledge regarding the congregation and the community
- g. Uplifting the positive aspects of the pastoral change
- h. Leading in prayer for the new pastor

Grace-filled Sendoff:

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

- a. Provide appropriate appreciation for the ministry of your current pastor
- b. Provide a festive atmosphere for a farewell celebration
- c. Mend fences – let go of differences that might have caused undue friction
- d. Help make the moving process smooth
- e. Cooperate in working on issues in the parsonage
- f. Help in gathering the materials needed for the new pastor's entry
- g. Uplift the positive aspects of the pastoral change
- h. Begin to pray for the exiting and entering pastor and their families

Saying Goodbye and Coming to Closure:

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

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

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

Returning to a Previous Appointment.

1. As of the effective date of a new appointment, a pastor shall immediately cease all pastoral counseling and pastoral visitation with members or member families in the previous appointment. Since appointments are generally announced at least several weeks in advance, each pastor has adequate time in which to affect closure and make appropriate referral to another for the pastoral care of members.

2. Pastors shall have a clear understanding with former congregations that they will not return to officiate at baptisms, weddings, and funerals, or do pastoral counseling or pastoral visitation in that parish. Pastors, active or retired, shall respectfully decline to participate in such duties when invited by members of a former congregation. Declining all such invitations is the responsibility of the previous pastor.

3. The District Superintendent must be consulted by the previous pastor in advance of any return for pastoral functions. Such visits to former churches shall require the advance approval of the District Superintendent. The present pastor should never be under any pressure to invite the previous pastor. Pressure to involve the previous pastors should not be generated by either the congregation or the previous pastor.

4. Several weeks prior to concluding a pastoral appointment, a pastor shall inform all members of the church of this policy by printing sections 1, 2 and 3 verbatim in either a pastoral letter that is to be sent to each member, or a church newsletter which can be mailed or emailed to the congregation.

Leave Taking (Exiting Pastor)

Overview

- 1. Exit interview**
- 2. Parsonage issues**
- 3. Coming to closure – How do we help the pastor to say goodbye?**
- 4. Administrative matters – All issues are open for discussion**
- 5. Pastoral care / Status of congregation**
- 6. The results of any recent self-assessment programs**
- 7. Moving plan for exiting pastor**
- 8. PPRC responsibilities – should communicate boundaries regarding outgoing pastor**

1 - Exit Interview:

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

Who participates in the exit interview?

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

When should the interview take place?

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

What should the setting be?

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

What is the format for the exit interview?

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

The agenda might include:

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

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

2 - Parsonage Issues:

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

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

- a. Identifying who needs personal contact
- b. Coming to closure with key groups
- c. Letting go of grudges
- d. Communicate the new role of the exiting pastor to that pastor and the congregation

4 - Administrative Matters – All issues are open for discussion

- a. PPRC may want to help exiting pastor with these tasks
 - Review of membership lists
 - Review of ongoing agendas
 - Making summaries of status of boards and committees
 - Preparing a notebook containing minutes of meetings for the past year
 - Updating calendar for the church
 - Cleaning out the files

5 - Pastoral Care / Status of Congregation

- a. Assist the exiting pastor in preparing notes for pastoral care needs
 - Counseling
 - Life transitions
 - People who need to be looked after
 -

6 – Results of any recent self-assessments & Preparation of the Transition Audit

7 - Moving Plan for Exiting Pastor

- a. Assist in planning for the move, set dates, budgets, movers, etc.

8 - PPRC responsibilities – should communicate boundaries of the exiting pastor

- a. Communicate clearly to the congregation the new role of the exiting pastor
- b. Emphasize the importance of keeping boundaries

Entry To The Congregation & Startup (new pastor)

Overview

1. Preparing for new Pastor
2. Planning for the Move In
3. Welcome
4. Introductions to Congregation
5. Introductions to Community
6. Team Building Process

1. Preparing for new Pastor

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

2. Planning for the Move In

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

3. Welcome

- Plan worship for first Sunday
 - a. New Pastor and his/her family is introduced
 - b. New Pastor is freed from leading worship on first Sunday
 - c. New Pastor should be part of the planning of this service, i.e., who will preach, issues around communion, etc.
- Welcome reception
- Church tour
 - a. How things work
 - b. Where things are
 - c. Who to contact
 - d. Basic understandings
- Orientation to office and church records
 - a. Giving out keys, reviewing codes, passwords, etc.
 - b. Learning about the building, equipment and computer systems

4. Introductions to Congregation

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

5. Introductions to Community

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

6. Team Building Process

- Plan monthly PPRC meetings
 - a. Feedback and continuous evaluation are important
 - b. Role negotiation
 - c. Goal setting for ministry objectives, with review of benchmarks and timelines
- September Congregation Gathering to tell church's story (History Sharing Experience).
 - a. Plan a time when you can have a meal and about three hours to work together. Provide childcare for the youngest after the meal. Work together on the history of the congregation. Invite someone outside the congregation to be the facilitator so that the pastor and laity can be full participants. Refer to worksheet on History Sharing Experience.
- Continue to use the Evaluation Process at 3, 6, 9, 12 month intervals – etc.

Entering Into a New Ministry – Bishop John Schol

Identifying, understanding and clarifying expectations

- 1. What is an expectation?** A strong belief that something will happen

- 2. One to one meetings.** Pastors hold one to one meetings with key leaders (elected leaders and perceived leaders) to:
 - a. Establish healthy relationships – I would like to know more about you. Tell me about yourself. What are you most passionate about in life? What uniqueness do you bring to the ministry of the congregation? What do you need to serve well in leadership?
 - b. Understanding the congregation – What are the gifts and strengths of the congregation? What do people appreciate about the congregation? What are your hopes for the congregation? Do you have any concerns about the congregation? Where would you like to see the congregation in five years?
 - c. Understanding expectations – What do I need to understand to serve well in the congregation? What are 3-5 things you would like to see me do in the first year of my ministry with the congregation?

- 3. Small group house meetings** – an opportunity to get to know a broad segment of the congregation in an informal setting. These gatherings are usually held in a church member's home with 10-18 people gathered. Begin by going around the circle and asking each person to introduce himself or herself to you by sharing their name, how long they have been associated with the congregation, and what is one thing they appreciate about the congregation. Then ask the full group the following:
 - a. Share a hope you have for the congregation?
 - b. Share one concern you have?
 - c. What is the next important step we should take to fulfill our mission?
 - d. What are your expectations for our ministry together?
 - e. What questions do you have for me?

- 4. Identify your first six month goals** and share them with the staff parish relations committee and the superintendent and invite their feedback

- 5. Identify your 2014 goals**, following your one to one and small group meetings, and share them with the staff parish relations committee and the superintendent.

- 6. Periodic Check-ins** – During the first year, the pastor and the staff parish relations committee are to meet quarterly to:
- a. Provide updates on ministry
 - b. Identify what is going well and why
 - c. Identify challenges and how the challenges are being addressed
 - d. Clarify and establish reasonable expectations

Quarterly the pastor and Staff Parish Relations Chair person are to complete a quarterly update and email it to the superintendent.

- 7. Table discussion with church and new pastor**
- a. Who are the key elected leaders and perceived leaders that the pastor should meet with?
 - b. Who will arrange for the small group house meetings?
 - c. How many one to one meetings are appropriate for your church?
 - d. How many house meetings are appropriate for a congregation your size?

Some Resources For Use By Your Transition Team

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

Included are:

Appointment Quarterly Evaluation	pp. 20 – 21
INFO-PAK	p. 22
Pastoral Transition Audit	pp. 23 – 24
Chat Topics	p. 25
A History Sharing Experience	p. 26
Special Services	p. 27

Appointment Quarterly Evaluation

Place the number that appropriately corresponds with your view
 Ratings - **Strongly Agree (1); Agree (2); Disagree (3); Strongly Disagree (4)**

Evaluation Periods

Evaluation Area	9/30/14	12/30/14	3/30/15	6/30/15	9/30/15	12/30/15	3/30/16
Understanding and Relationship Building							
A sufficient number of small group meetings have been held with laity							
The pastor has conducted 1 to 1 meetings with key church leaders							
The pastor is connecting well with the congregation (s)							
Expectations							
Fruitful conversations with the SPRC and Church Council have been held about expectations							
The pastor understands the expectations of the congregation							
The pastor is meeting the church's expectations							
Initial objectives were set and are being worked on or are completed							

12 month goals have been set for the calendar year							
Evaluations have been completed in a timely manner							
Fruitfulness							
Worship attendance is growing							
We are seeing more visitors							
More people are attending small groups and Bible studies							
More people are engaged in community ministry							
Giving has increased							

Comments

Pastor and SPRC will complete separate Quarterly Check-Ins. Pastors, please submit your Quarterly Check- In on 10-1-2014 and each quarter thereafter. Please be sure that the SPRC Check- In is also submitted each quarter beginning 10-1-2014.

INFO-PAK

(Information for the Pastor's Action Kit)

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

Church Documents:

The alphabetical membership roles with address, phone, and email information.
The updated 2014 Directory of Officials, (with contact information and updates of most recent elections)
The 2012 and 2013 Church Conference Reports
The 2012 and 2013 Year End Statistical Reports
The 2012, 2013 and 2014 Budgets & Treasurer's Report & 2014 to date (Later updated to June 30)
The 2013 Detailed Attendance & Stewardship records & 2014 to date (Later updated to June 30th)
A summary of attendance and stewardship records for the last 5 years.
The 2012 and 2013 Financial Audits & Complete Current list of all accounts and liabilities
The 2012 and 2013 Worker's Compensation Audits
The Pastoral Transition Audit

Pastoral Contact Information

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

Information for Conducting Church Business

Detailed staff information (people, hours, job descriptions, etc.)
A complete set of labeled keys, combinations, codes
All codes and passwords (fire, alarms, computers, etc.)
Equipment & Supplies information
A list of services supplied to church and parsonage (with contact information) & all church contracts
Church petty cash, church accounts, discretionary accounts and charge cards information
Church calendar – with special emphasis on previously planned events
2013 & 2014 Bulletins (typical, communion, holidays, special Sundays) (guest & emergency preachers)
2013 & 2014 Church newsletters, congregational mailings and eblasts.

Helpful Neighborhood Information

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

Church Name: _____

Pastoral Transition Audit

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

1. Average worship attendance reported in the statistical report submitted to the conference for 2013 ()
2. Average worship attendance for the first six months of the present year ()
3. How often did the Staff Parish Relations Committee meet during 2013 ().
How many times has it met since July 1, 2014 ()
4. How often did the Church Council meet in 2013 ().
How many times has it met since July 1, 2014 ()
5. Does the pastor have a discretionary account ___ yes ___ no? If yes was there an internal audit by the Staff Parish Relations and Finance Chairpersons of the accounting at the time of the pastoral transition ___ yes ___ no? If not an audit is to be conducted immediately.
6. What percentage of shared ministry was paid from January 1 to June 30 ()?
7. What percentage of direct bills (pension, health and property insurance) was paid from January 1 to June 30 ()?
8. What percentage of shared ministry and direct bills are anticipated to be paid by the end of the year ()?
9. Are there any financial concerns within the congregation ___ yes ___ no? If yes please describe
10. All healthy congregations engage in appropriate disagreement that has some level of conflict. It is not unusual to experience level one and even level two conflict. Read the statements of conflict below and indicate the level within the congregation. My assessment is that the church is a level _____ conflict.

Definitions:

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

Level Two: The focus shifts from solving the problem to caring for myself. People feel, we've got a problem to fix, but I don't want to be associated with it. I'm going to be cautious, armor myself, plan before I talk to the pastor. I'll talk with other people, but not share fully all I know about the situation. People are nervous, which you can tell because they generalize everything: "We're not communicating. There seems to be low trust around here. There are some difficulties with the choir." But they don't describe the problem specifically. The role of the pastor, then, is to get people talking.

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

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

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

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

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

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

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

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

Name of Church:

Date Submitted:

Name of pastor reviewing the form:

If there is an associate pastor, has the form been reviewed with the associate pastor? ___ yes ___
no

Names of church leaders who have reviewed the form:

Some Interesting “Chat Topics” For Church Groups

(Some Things Your Church & All New Pastors Will Want To Discover)

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

A. What is the context of our ministry?

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

B. Identity

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

C. Program / Ministry

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

D. Process

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

E. Helpful Information

1. What do the census studies say about our ministry opportunities?
2. Church data – who really “knows” and how is information shared?
3. What are the programs of our church and who makes it happen?
4. What are Our Stories?
5. Interviews with community leaders – Who do they say that we are?
6. Do we have an inventory of present and potential leadership (a talent bank)?

A History Sharing Experience

An interesting experience in a congregation that has received a new pastor is a time for history sharing. It is a time for persons in the congregation to gather, to share stories of their life together, and to reflect on what it means for the congregation at this time. It makes a great fellowship activity.

Such an experience can be helpful to the church and the new pastor in several ways:

- a. It assists the inclusion process. The pastor becomes one of us when he/she knows our stories.
- b. Key events in the life of the church are shared.
- c. Insights into past successes and failures are gained.
- d. One learns who are the pastors of the past and who in particular is the one by whom the current pastor will be judged.
- e. Assists the new pastor and leaders to assess what the meaning of all of this is for the congregation.

Arrangements:

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

Process:

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

Special Services

Farewell Service:

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

Installation Service:

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

Re-Appointment Service:

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

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

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