

Strategic Planning With a Church in Transition

The Reverend Ronald D. Pogue

Fieldwork Project
The Intentional Transitional Minister
Interim Ministry Network
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Introduction

This project is undertaken in preparation for my first interim assignment and, therefore, is not the actual experience of guiding the process. I have guided the visioning/strategic planning process in congregations with a settled pastor. My purpose in this project is to explore ways the visioning/strategic planning process is different in congregations that are in transition between pastors.

Guiding Principles for Strategic Planning

1. Strategic planning involves discernment of a vision for the congregation.

“Where there is no vision, the people perish” – Proverbs 29:18 KJV

“The soul never thinks without a picture.” - Aristotle

The vision of the apostles was to become fishers of people.

A vision statement paints a picture of the reality into which we believe God wants us to live. It is a statement about *being*. With the vision statement in place, actions can be taken and assets linked in new ways to close the gap between present reality and the vision of a preferred future. I have led each congregation I have served in a process of visioning and strategic planning because:

- We cannot become what God wants us to be simply by remembering what we have been or perpetuating what we now are;
- A vision must be in place before people will leave the past and let change happen; and
- The leader must diligently uphold the vision for the corporate body.

2. Strategic planning clarifies the congregation’s mission in pursuit of its vision.

“A small body of determined spirits fired by an unquenchable faith in their mission can alter the course of history.” – Mohandas Gandhi

The mission of the apostles was to follow Jesus.

A mission statement defines in a paragraph or so the congregation's reason for existence. It embodies its core values, goals, ambitions, and mores. A congregation that attempts to operate without a mission statement runs the risk of wandering through the world without having the ability to verify that it is on its intended course. It is a statement about *doing*. The mission statement is important because:

- It describes the intentional action that will be necessary in pursuit of the vision God has inspired so that the vision is more than wishful thinking;
- It clarifies the core values that will guide the congregation in making decisions about deployment of people and allocation of resources;
- It provides the leaders with standards of the congregation that will be useful in providing oversight in helping the congregation advance in pursuit of the vision.

3. A strategic plan supports the mission of the congregation.

A good strategic plan begins with a commitment to the vision and mission of the congregation as set forth in the statements that have been drafted and agreed upon. The plan is “strategic” because it is developed from a viewpoint that encompasses the entire congregation and the mission field it is committed to serve. It provides specific goals, objectives, roles, responsibilities, timeframes, and accountabilities with sufficient detail to be useful to people at all levels of congregational life – leaders, congregants, and staff.

4. Strategic planning is different for congregations that are between pastors.

The strategic planning process is different for congregations that are between pastors. The imprint of the former pastor will likely affect certain aspects of an existing strategic plan. The new pastor has not yet arrived. The time of transition is an ideal opportunity for a congregation to study its past, assess its present situation, and consider its future. It is also a time to make strategic changes in leadership, reconnect with the denomination, and prepare a profile that will be useful to those who are under consideration as the next pastor.

I have drawn upon the work of Alice Mann, Gil Rendle, Roy Oswald, and others in their approach to strategic planning as “holy conversation” and as “spiritual practice” for congregations. The book, *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations*, by Gil Rendle and Alice Mann is an excellent resource for strategic planning in any congregation and is described as “the Alban Institute approach.” Excerpts from the text of *Holy Conversations*, from the *Holy Conversations* website (<http://www.holyconversations.org/>) and adaptations of their writings that are displayed on the Alban Institute website (<http://www.alban.org/bookdetails.aspx?id=696>) are included in my description of the following summary of the process I have developed for use with churches that are in transition.

“Planning is a conversation. For congregations, it starts with the question: ‘What work would be most helpful for this holy conversation?’ While the roadmap to the full planning process appears linear, like any good conversation, it will have its own natural flow. [Leaders ask] ‘Where should we be giving most of our attention

at this time?’ Leaders should also ask what type of structured conversations are people willing and able to have now. Those will become entry points into other parts of the planning process.”ⁱ

I also invited several experienced, trained, intentional interim ministers working in Episcopal Churches to respond to a set of six questions:

- How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?
- What aspects of planning in a transitional setting are helpful in the search process?
- What aspects of planning in a transitional setting are helpful to the new pastor?
- How have the roles of the governing body, transition committee, planning committee, and search committee been defined?
- What elements of the interim minister’s role are particularly important in planning?
- How have you related the developmental tasks to the planning process?

Their responses are contained in Appendix I and I have quoted them throughout this description of the planning process.

The process I propose has eight phases. The first four phases are organizational and facilitate the gathering and analysis of information. The last four phases involve discernment, decision making, and communication. How extensive the planning process will be and when to begin must be determined in light of the circumstances of each congregation in transition. The process I am describing is intended to be used to develop short-term goals so that after a new pastor is called he or she will be able to join the congregational system and work with them in developing new plans in which his or her ministry finds expression. Because many transitional congregations have high degrees of conflict, it is important to avoid thinking that the planning process will resolve the conflict. The degree of conflict that is present will also affect both the timing and the extent of the planning process.

The following description also presupposes that the interim is the person who shepherds the congregation and its leaders through the planning process. This does not preclude the use of other consultants and I’ve attempted to describe how, when, and where other consultants might be engaged.

“The leader is not responsible for discovering the perfect solution or for creating a perfect planning process to get people to arrive at a perfect plan. Instead, the task of the leader is to help the people have a purposeful and meaningful conversation about who they are and what they believe is important to do. It is a conversation that can, and often does, result in a written plan.”ⁱⁱ

The Strategic Planning Process

Rendle and Mann provide a good operational definition of the strategic planning process:

“Our operational definition of strategic planning is a structured conversation about what a group of people believe God calls them to be or to do. The goal of the planning process is to structure the conversation people need in order to shape agreement and enthusiasm to pursue what they believe God calls them to be or do.”ⁱⁱⁱ

Phase 1: Obtaining authorization to proceed - “The planning process must belong from the outset to those who will approve and implement it. The consultant’s role is to advise, support, and facilitate, not to manage the process or direct its outcome.”^{iv}

There should always be agreement with the leadership that a shared vision, purpose, and plan are desirable for the congregation. Even if vision, purpose, and plan are in place, it is necessary to revisit because a change in pastoral leadership is underway. The need for a process of visioning and strategic planning should be carefully discussed with judicatory and congregation leadership prior to entering the interim relationship.

Gary Goldacker considers planning during transition a necessary element of preparing for the call of a new pastor.

“I believe that a congregation must have a vision and a strategic plan against which to evaluate rector candidates. How can you know what kind of priest to call if you don't know where you are going?!”^v

How the process will serve the governing body and the search process should be clarified and mutually agreeable to all parties. If the visioning and strategic planning process is to assist the search committee in its task, care must be taken to leave some points of flexibility in it so that the new pastor, when called, can be allowed to provide input. At a later time, the settled pastor will provide leadership as the congregation looks beyond the plans established during the time of transition.

Important insights into the congregational system will be gained during this phase. The interim will have opportunities to begin to hear stories about the congregation’s history, determine the degree of clarity that exists about the congregation’s identity, assess the congregation’s leadership, understand the congregation’s relatedness to the judicatory and denomination, and explore the readiness of the congregation for the changes that will be necessary in order to commit to a new ministry. The interim will begin to introduce the five developmental tasks.

Evelyn Hornaday has a slightly different perspective on what’s different about planning in a transition.

“I haven't found the visioning/planning process itself to be any different than at any other time. However, as an interim rector *I* am different than when I've been in my

own parish -- as an interim, the planning process must be about the church and the church only, and not about my dreams/ideas/hopes for them.”^{vi}

Phase 2: Forming the Team - “The key to the process is a strong planning team composed of persons who are open to discern what the congregation is called to be and do; who understand the political realities; and who understand the value of open deliberations and the need for a redundant system for keeping the membership informed.”^{vii}

When recruiting and training a team to share in guiding the process, it is desirable to include people of different viewpoints, ages, ethnicity, gender, socioeconomic status, theological perspective, and people from outside the congregation. At this stage, the roles and responsibilities of the interim, governing body, planning team, search committee, transition team, and judicatory should be carefully spelled out. If additional consultants are to be employed to assist with the process, that decision should be made prior to recruiting leadership from within the congregation.

There may be circumstances in which the planning team and the search committee are one and the same. There may also be circumstances where the transition team and the search committee are one and the same. And, there may be circumstances where the roles of planning, search, and transition are carried out by one group. The circumstances that determine when the roles of the various committees may be combined must be established ahead of time in light of congregational needs and concerns, availability of leadership, judicatory policies, and the extent of the work to be accomplished. The rationale for decisions about combining or not combining roles and responsibilities should be carefully worked out and expressed in writing. There is a strong consensus of opinion favoring a distinctive role for the governing body. The governing body should not do the work of the planning, search, or transition committees. Adhering to this principle allows the governing body to engage in best practices, lead rather than manage the other committees, and to concentrate on its own unique work in the congregational system. This also allows the transition team to work more freely in regard to the developmental task involving potential changes in leadership. The frequency with which reports to the governing body and the judicatory should be established and communicated in advance.

Accountabilities should be spelled out and everyone who is asked to participate in the process, leaders and other members of the congregation should be asked to agree to mutual accountability. My preference is to refer to accountability as “watching over one another in love.”

It is likely that new leadership will emerge during this phase of the process, so the interim should be observant, watching for good leadership traits among those who are entrusted with the task of guiding the planning process. How the governing body goes about determining who is “in” and who is “out” is a key to how it will handle future decisions about leadership.

Phase 3: Conducting a Self-Study – “Early in the process, the planning team identifies a group of “driving questions” and presents them to the governing Board for endorsement. It is essential that the leadership feel a sense of urgency about addressing the driving questions. . . Data

collection should be focused on data that will help to answer the driving questions, and designed to make collection and interpretation manageable.”^{viii}

These driving questions are described in *Holy Conversations*. Excerpts of the description may be read online at <http://www.alban.org/bookstore.aspx?id=5686>.

In preparing the congregation to examine itself and its mission, it is important to provide a definition of vision, explain why vision is necessary, and look at how vision is different from mission. (A vision statement addresses “Why,” and a mission statement emphasizes “How.”)

The interim and other leadership should engage in a period of biblical and theological study and discussion in order to ground the process in core values. The interim and other leaders should jointly engage the rest of the congregation in a similar study as the beginning point for congregational self-study. Material from the biblical and theological process should be tied to the remainder of the process. In this phase of the process, the congregation links its story to the stories of the faith and of the tradition to which it belongs.

The widest possible participation can be accomplished through home meetings, focus groups, surveys, and other means of input, keeping the focus on what people appreciate. It is important to consider the views of those outside the Church, current and reliable demographic studies, and identified community concerns.

“Data collection should be focused on data that will help to answer the driving questions, and designed to make collection and interpretation manageable. Both internal and external data should be gathered. Internal data includes feedback from the membership considered both as ‘consumers’ and ‘producers.’ External data includes information about the local community and the larger social and religious context.”^{ix}

Evelyn Hornaday cautions that the participation of the parish in the process is essential to the integrity of the final results and relates directly to the search for a new pastor.

“The most important piece of planning related to the search process is this: does the parish, not just the Vestry, know what their identity is and live into it? If the planning work is just an exercise for and by the Vestry and Search Committee in order to “get on with it,” the new rector will get a rude awakening when he/she arrives to find the people having a different self-understanding.”^x

This will probably be the most lengthy phase of the process and will be the one during which the five developmental tasks are most fully engaged. The interim should take care to see that there are redundant opportunities for narrative work as well as obtaining data and other input through questionnaires and surveys. All participants in the process should be encouraged to tell their stories and listen to the stories of others during these “holy conversations.” What are the stories that express the hopes of the founders, stories that might explain the hurts of the congregation, stories where redemption is involved, stories about pastors coming and leaving, stories about cooperation with the denomination and other congregations, and stories that suggest hopes

for the future? There are numerous techniques for drawing out the stories and the details. Some people will respond more positively to one process than another, so several different kinds of opportunities should be offered.

John Goddard finds the stories people tell to be a very important aspect of this phase of the process:

“I have found some of the jewels of a parish sharing an appreciative inquiry tool, which is to ask one member at each meeting to share one event at parish X that stands out in their mind as significant in their life. My experience has been that the first person approaches this assignment with hesitation, but by the next meeting a flood of events will come out and holding those until some one else has shared builds the passion for the life of the history of the parish. From this we have a base to build on for a vision for the future.”^{xi}

Phase 4: Analyzing the Self-Study - “Strategic Planning requires both wide participation and deep integrative thought. This tension is best maintained by a cohesive Planning Team that reaches out several times during the planning to keep the membership contributing to and learning from the process.”^{xii}

The team reviews the responses to identify priorities, patterns, and themes. Look for metaphors and descriptive words and phrases. Particular attention should be given to insights that clearly relate to the core values and to insights into patterns of congregational life that have continued to be sources of difficulty or signs of health. The information that has been obtained should be examined in light of the five developmental tasks. What does this tell us about our history? What does this tell us about who we are? How does that compare with who we think we are and who we want to be? What does this tell us about our leadership? What does this tell us about our relationship with the denomination and other churches? What does this tell us about new directions? At what points is change called for and are we willing to pay the price of the change?

Steve Rottgers developed a process called *Ripe for the Harvest* for surveying and analyzing congregational systems. He has used this process in forty different congregations and has found it helpful in identifying the traits of their next leader.

“*Ripe for the Harvest* sets a biblical standard from the Great Commandment and Great Commission, but also allows flexibility and change to occur. The *Ripe for the Harvest* process helps . . . inform a parish of what areas are being done well, what needs to be corrected, and where do they want to go. All of this helps form an understanding of what kind of leader do they want.”^{xiii}

A cautionary note about the next steps in the process - Dan Hotchkiss offers some sound advice that is pertinent in a transitional setting. He advises that continuity of leadership is important in an extensive planning process. “If a congregation is in the midst of a major leadership transition,” says Hotchkiss, “it should focus on short-term plans and goals that will provide a 'vision of ministry' for the next one to three years rather than undertake a more extensive

strategic planning process.” He also offers caution related to the level of conflict that is present. Although some congregations think they can deal with conflict by doing planning, Hotchkiss does not think such an approach is helpful. “Planning may feel like a more comfortable frame because people think it will allow them not to deal with important differences of opinion,” he says. “But conflict is not a good basis for doing planning. In such situations, it’s a mistake to call the next step planning and doing so often will taint the idea of planning in the future.”^{xiv}

This is also the phase of the process when a congregational profile and a profile of the next pastor begin to take shape. The planning team should take great care from this point on to present their analysis and the draft of the profiles to the governing body. The governing body may ask the planning team to make adjustments or editorial changes to what they have prepared. Therefore, while the planning process is not conflict management, the interim, the governing body, and the planning team need to be prepared for some healthy conflict resolution alongside the process as it moves forward. For example, the planning team may feel that the congregation and its leaders are not in agreement and may be unwilling to make any or all the modifications that the governing body is requesting. Or, the governing body may discern that there are too many things on the list or that more time or funds will be needed to accomplish some of the things that are being proposed. The skills of the interim in managing conflict may be tested at this point. If agreement to bring in someone else to manage conflict has been obtained in the beginning stages of the process, this would be the time to execute that decision. To use an outside mediator is not an indication that the conflict management skills of the interim are inadequate. Rather, it is an acknowledgement that the interim has joined the system. Someone outside the system who is neutral may be more effective in guiding the process along at this point in order to reach agreement on what is about to be presented to the congregation and to potential candidates in the search for a new pastor.

Phase 5: Catching the Vision - “Shaping the future can come in the form of a unique defining statement about the congregation in terms of mission and/or vision.”^{xv}

The interim leads the planning team in a study of the data that has been gathered in light of scripture, church documents, and other materials to help them appreciate the vision God has for the congregation. It is important to know the vision of the judicatory and the denomination because each member congregation shares in that vision as well as a vision that is uniquely its own. The planning team should test for alignment of vision on both the local level and the level of the larger church. Insights gained are synthesized with insights from the self-study. A captivating vision will begin to emerge.

Phase 6: Expressing the Vision - “The planning process is an effort to help the congregation tell its story. Biblical theologian Walter Wink suggests that every congregation has its own angel with two voices: the voice of personality and the voice of vocation. The voice of personality speaks to the congregation’s past, the people who have left their imprint, commitments made, and risks taken. The voice of vocation, however, is the voice of the future. It talks of commitments and values to be lived out, hopes to be realized, and costs to be paid willingly for the greater purpose. The result of the holy conversation is the naming, claiming, and committing to a vocation. It is the first step on a path of faith and calling.”^{xvi}

The planning team prepares the final draft of a statement that clarifies the vision of the possibilities God is offering. It paints a picture for the church, which leadership will diligently hold up. The vision statement is submitted to the governing body for approval.

Phase 7: Developing a Mission Statement - “Institutional health requires a clear understanding of the mission and common covenants about behavior. Ordinarily the best time to attempt to clarify these is after the internal and external data gathering are complete. Statements of mission and covenant should be richly informed by the faith tradition.”^{xvii}

The mission statement expresses the key ministry objectives of the Church in pursuit of its vision. For example, the vision of the disciples was to become fishers of people. Their mission was to follow Jesus. As with the vision statement, the planning team should ensure that the mission statement is aligned with the mission of the larger church. The mission statement is presented to the governing body for approval.

Phase 8: Developing the Strategic Plan - “Once the uniqueness of the congregation and its future has been shaped in descriptive statements, the next stage is to move toward workable plans. Objectives are what the congregation must do or be to shape its future. Goals state how the congregation will accomplish those objectives. They are often expressed as programs, events, or strategies. Formulating objectives, goals, and recommendations can lead to clear plans for action that shape the congregation’s future. . . A written plan with specific recommendations or action steps is one important outcome of the planning process. At least as important is the process itself—the Planning Team’s success at getting the membership to feel urgency about the Driving Questions and to grapple seriously with them.”^{xviii}

The comprehensive plan that emerges should be consistent with the vision and mission statements. The plan contains details of the actions that will be taken in performance of the mission and in pursuit of the vision. It should include responsibilities, covenants of conduct, and accountabilities during a reasonable timeframe. Rapidly changing economic and population dynamics in the mission field at our doorstep necessitate ongoing review and revision about every three to five years. Since this is a church in transition between pastors, some flexibility will need to be built in to the plan to allow the new pastor to provide some input that will enhance his or her ability to be most effective.

For example, the plan might include events and procedures intended to welcome the new pastor over the course of the first year. It might offer several options that have emerged from the congregation, such as the reception after the service of installation, gatherings in homes, media releases, and invitations to various community organizations. The new pastor’s preferences should be taken into consideration before executing any of these plans. Perhaps the search committee would find a way to intentionally discuss these or other aspects of the plan during the interviews with finalists for the position.

The strategic plan is presented to the governing body for approval. This approval is an element of commitment to a new ministry and the governing body should be conscious of the implications. With the full support of the governing body, the results are communicated to the congregation in a variety of ways to foster the broadest possible understanding and participation.

The responsibility for dissemination is assigned at the beginning of the process. It may be the work of the governing body, the planning team, the transition committee, or the search committee. In any case, it is important that those who are identified as the congregation's leaders give their full support.

George Martin points out benefits of having a plan in place when the new pastor arrives.

“The lack of planning that infects many congregations leads to sloppiness and a casualness that hardly represents the best we have to offer. Good planning raises the water level, as it were, and many things in a parish will improve along the way. All of this will greatly assist the new pastor.”^{xix}

Implementing the plan - “A good plan will suggest things the institution should not be or do. Unless a plan provides a basis for selecting a short list of priorities and setting others aside, it will not affect the institution's future.”^{xx}

With the vision and mission statements and the strategic plan in place, the profile of the congregation and the profile of qualities, gifts, and characteristics the congregation seeks in its new pastor can now be developed and ready for use in the search for a new pastor. Anchored in a vision, driven by a mission, the plan will be executed under supervision of the new pastor and key leaders of the church.

What's often missing?

George Martin reminds us of one final and essential task.

“What's often missing? It's evaluation. It helps if there is an evaluation process set up for the interim and the board. It's there in most contracts these days. We just need to extend this idea to everything we do asking “Did this work? Why? How? Why not?” The evaluation needs to be done in light of our sense of mission and especially whom we are serving, and how what we do best represents the God we serve. Then notes need to be taken after an event so that we don't repeat the same mistakes over and over again. Evaluation needs to include staff members in a way of mutual ministry as we seek to ask how we're doing in ministry. We also need to welcome input from others. We live in a meritocracy where everyone already has an opinion, where they are talking to their neighbors, and where they talk with their feet when they walk out on us.”^{xxi}

Appendix I

Interim Clergy Responses

In addition to studying the text, *Holy Conversations*, I asked several experienced and trained intentional interim clergy, serving Episcopal churches, to share their responses to six questions via email:

1. How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?
2. What aspects of planning in a transitional setting are helpful in the search process?
3. What aspects of planning in a transitional setting are helpful to the new pastor?
4. How have the roles of the governing body, transition committee, planning committee, and search committee been defined?
5. What elements of the interim minister's role are particularly important in planning?
6. How have you related the developmental tasks to the planning process?

I have included the complete responses from five of these colleagues whom I have quoted in the report. With the names of the locations they were serving at the time of their response, they are:

- The Rev. John Goddard
Interim Rector, St. Margaret's Episcopal Church
Lawrence, Kansas
- The Rev. Evelyn Hornaday
Interim Rector, All Saints' Episcopal Church
Stafford, Texas
- The Rev. Gary Goldacker
Interim Rector, Good Shepherd Episcopal Church
Wichita, Kansas
- The Rev. Steve Rottgers
Interim Rector, Grace Episcopal Church
Georgetown, Texas
- The Reverend George Martin
Interim Rector, St. Margaret's Episcopal Church
Palm Desert, California

**Response of The Rev. John Goddard
Interim Rector, St. Margaret's Episcopal Church
Lawrence, Kansas**

From: jgodd6@gmail.com
Sent: Saturday, June 27, 2009 2:52 PM
To: ronpogue@sbcglobal.net
Subject: Re: My IMN Fieldwork Project

1. How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?

I have found the need for redefining the mission and vision of the parish very helpful in all situations for interim ministry. Why? Even if a rector or pastor has only been with the congregation a short time, clear definition of parish identity gives ownership for the next phases of life. This also allows the parish to come to terms with their history as they work through this redefining process.

2. What aspects of planning in a transitional setting are helpful in the search process?

Being able to state that the mission and vision of the parish has been updated, reviewed and renewed gives the search team a good starting point for the profile of the parish.

3. What aspects of planning in a transitional setting are helpful to the new pastor?

The same above, with knowledge to start the discussion of where the parish is going now that they have come together as priest, or pastor and congregation.

4. How have the roles of the governing body, transition committee, planning committee, and search committee been defined?

This defining is needed for the process but also for the life of the parish during the transition time. The governing board will have certain situations arise that will require their undivided attention. The transition team is a great way get a broad view of the vision of ordinary members that have a history with the parish. I have found some of the jewels of a parish sharing an appreciative inquiry tool, which is to ask one member at each meeting to share one event at parish X that stands out in their mind as significant in their life. My experience has been that the first person approaches this assignment with hesitation, but by the next meeting a flood of events will come out and holding those until some one else has shared builds the passion for the life of the history of the parish. From this we have a base to build on for a vision for the future.

5. What elements of the interim minister's role are particularly important in planning?

Keep the tasks before you and even when resistance is put forth that we don't need to look back only forward. The interim can carefully build a trust relationship with the leaders and the parish

for examining the past, identifying the special nature of the parish as you move toward the transfer of leadership to the new pastor.

6. How have you related the developmental tasks to the planning process?

Well I think all of the above speaks to this question. Keep reminding leaders and the congregation as a whole about why you are there and what this time is about. Make sure when you change leaders on the governing board that all receive a copy of you letter of agreement and understand the roles each play in the transition time. Each of the developmental issues are key to re-visioning and looking to the future life of the congregation.

**Response of The Rev. Evelyn Hornaday
Interim Rector, All Saints' Episcopal Church
Stafford, Texas**

From: Evelyn Hornaday [ehornaday@comcast.net]
Sent: Tuesday, June 30, 2009 5:46 PM
To: Ronald D. Pogue
Subject: Your IMN Fieldwork Project

1. How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?

I haven't found the visioning/planning process itself to be any different than at any other time. However, as an interim rector *I* am different than when I've been in my own parish -- as an interim, the planning process must be about the church and the church only, and not about my dreams/ideas/hopes for them. In the Diocese of Texas Mary MacGregor is the planning guru, so my role has been one of support and coordination on her behalf. After the parish has done the work, then I find I am most useful by asking them the kinds of questions that help them confirm what they have said about themselves -- "This is what you said; is that what you meant?"

Other dioceses expect different things and processes in planning, so elsewhere I have been able to use my corporate experience with strategic work very directly, with no particular expectations of proscribed processes/procedures from the bishops.

My advice on this: know what the diocesan expectations are about this and work accordingly. Don't be offended if your considerable experience isn't used the way you think it should be!

2. What aspects of planning in a transitional setting are helpful in the search process?

The most important piece of planning related to the search process is this: does the parish, not just the Vestry, know what their identity is and live into it? If the planning work is just an exercise for and by the Vestry and Search Committee in order to "get on with it," the new rector will get a rude awakening when he/she arrives to find the people having a different self-understanding.

3. What aspects of planning in a transitional setting are helpful to the new pastor?

My experience tells me that identity, resolution of conflicts/healing, and understanding/accepting change as being a positive attribute are what's critical to a new rector. Identity I've already mentioned. Next, no interim rector should leave a parish with critical issues or conflicts unidentified and resolved fully, if possible. (It isn't always possible, but healing should have begun and been recognized as important by the leadership. Sometimes just naming the issues goes a long way toward healing.) This includes whatever personnel problems, paid or volunteer, are present -- they must be dealt with prior to the new rector coming, so that his/her short-term responsibilities revolve around getting to know the people and becoming part of the fabric of their lives, not firing the whom-ever.

Finally, the most obvious discomfort for an interim is the changes we're there to make. "Things just aren't the way they used to be" -- "Fr./Mtr. So and So never did it that way" -- "We've never done it that way before" -- and then, "Why can't things be the way they always have been?" I have found this to be a real teaching opportunity about flexibility, doing things differently in liturgy, and always tying it to the new person to come: he/she will also do things differently, this is your opportunity to try out some different things. I always say they don't have to love it, it doesn't have to be set in stone for all time to come; but having explored new ways of being together as the Body of Christ will be a great gift they can give their new rector. The most discomfort arises in liturgical style. Just be true to yourself and help the people come along. Change things often enough to "shake them up " a bit, but not so often they feel like they're on a roller coaster.

4. How have the roles of the governing body, transition committee, planning committee, and search committee been defined?

The roles of the various committees you mentioned are no different than in a settled relationship. It is the interim rector that is different! How the committees are used is a variable based on the relationship between the interim and the leadership. I've never had a transition committee -- that's always been the Vestry. I suppose it would be of use in a large parish, but it dilutes the relationship between the Vestry and interim, I think. But as I said, I've never had one, nor have I thought another layer of bureaucracy was necessary!

Just be sure the Search Committee understands that its role is to find the one right person to be called, the one that God calls to a particular place -- they don't do the negotiating, the calling, the "business" of getting someone into the new position. That's the Vestry's job -- and no one else's. The Sr. Warden will work with the Canon to the Ordinary/ Deployment Officer on this, but the Search Committee's work is done when a recommendation has been made to and accepted by both the Vestry and the priest.

5. What elements of the interim minister's role are particularly important in planning?

I think it's important to understand completely that the role of the interim rector is to ferret out whatever needs to be addressed, so that a parish can be restored to health. And no matter what the circumstances were around the departure of the previous rector, there are things needing to be looked at and addressed. I find that just my presence and my experience brings these things out - - I don't hunt for problems, but I do know there always are things that have been hidden away and need to see the light of day. If I just wait, they'll surface. Better me than the new rector!

In the Diocese of Arkansas I was the one who set the pace for addressing the health of the parishes and working with the Vestry and others to become what they wanted to be, before the search ever was allowed to enter the minds of anyone. Thus, my tenures there were relatively lengthy and rich, although not everything was accomplished I would have liked. At least the new rectors had vitality, energy and vision awaiting them when they arrived! Everything else was easy enough to take care of.

In this diocese, the visioning/planning/search work often begins without a real assessment of the health and identity of a parish. Thus, the work is built on the past, and not on the potential found in the present and looking forward. I have found that inhibiting and limiting at times, because intentional interim training prepared me to put this particular skill set to work. But again, it's critical to know the expectations before going in. If you do, everything will be fine. It has been for me.

6. *How have you related the developmental tasks to the planning process?*

The developmental tasks are for the interim rector, basically, and used as markers for helping the parish get ready to call their new priest. Some parishes don't need to build/rebuild their relationship with their diocese, for instance, so check that one off the list! That doesn't mean you shouldn't be attentive to that task, and be sure that it is in good shape. Use these five tasks for yourself; I seldom talk about them, except maybe to the Sr. Warden. (They are, after all, lingo, and nobody really cares!) Unless, of course, one has arisen as an obvious and critical need.

**Response of The Rev. Gary Goldacker
Interim Rector, Good Shepherd Episcopal Church
Wichita, Kansas**

From: goldackerg@aol.com
Sent: Thursday, September 3, 2009 11:52 AM
To: "Ronpogue@Sbcglobal. Net" <ronpogue@sbcglobal.net>
Subject: Request

1. *How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?*

I usually begin the interim time by finding out what the CURRENT vision/plan is in the congregation. As an example, in one congregation they had worked up a big plan for the building addition (\$5-7 million) and when they found out that the rector was retiring (because he didn't feel like he wanted to see the plan through!), they were back to ground zero to decide how to move forward with the space/program issues that initiated the building plan and were still going to be problems.

The big difference, in my experience, between settled and interim clergy leadership is the one of seeing a plan through to its accomplishment and the trust level that instills in the vestry/planning team. It may impact how much input the interim can have into the process, particularly if the plan is a detailed, long range plan. If there is no long range plan in process when I get there, I generally stick with doing short range, immediate stuff that sets the congregation up for the new rector coming in.

2. *What aspects of planning in a transitional setting are helpful in the search process?*

I believe that a congregation must have a vision and a strategic plan against which to evaluate rector candidates. How can you know what kind of priest to call if you don't know where you are going?!!

3. *What aspects of planning in a transitional setting are helpful to the new pastor?*

And, as a priest, how can I know if this is the call for me that utilizes my gifts and interests in moving the congregation into its new future?!!! Most search committees that I have worked with want to have some kind of vision/plan to present to candidates.

4. *How have the roles of the governing body, transition committee, planning committee, and search committee been defined?*

How have roles been defined? The vestry role is defined by canon, the search role by the diocese, the planning committee by the vestry and the project, the transition committee by the task. I try not to get them intermingled any more than necessary because I believe that discrete tasks are easier to manage.

5. *What elements of the interim minister's role are particularly important in planning?*

As interim, I try to be a resource and guide to any of the committees, asking the "Have you considered.....?" questions. I think that as interim, I can be an objective presence and clear process observer.

I think that as the interim I can be helpful in getting the planning committee to see how realistic their plan is because I do not have a vested interest in the plan.

6. *How have you related the developmental tasks to the planning process?*

In doing that sort of short range planning, I take into account the developmental tasks and what needs to be done to accomplish them, without hindering the search. I also use in both settled and interim situations the old SWEEP program from the 80s that was fairly popular around the church. Mostly I look for deficit areas in congregational life and try to help the vestry improve those, if they are interested.

**Response of The Rev. Steve Rottgers
Interim Rector, Grace Episcopal Church
Georgetown, Texas**

From: Steve Rottgers [rector@graceepis.org]
Sent: Thursday, June 25, 2009 11:53 AM
To: ronpogue@sbcglobal.net
Subject: Re: My IMN Fieldwork Project

1. *How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?*

When I came to Grace Church in Georgetown initially as their Interim, as well as using my doctoral process, "Ripe for the Harvest" with Trinity, Marble Falls after Ann Normand left to be Canon to the Ordinary, I was looking for information to help better inform the vestry/bishop's committee, as well as the search committee as to the issues felt and lived by the membership. This process did not replace a "pre-set survey" that was to be used for search process, but to be a second test of the environment and community. The combination therefore better informed the vestry and search committee as to what issues and strengths were needed in a new rector, as well as what internal changes towards better health had to be made by the awaiting parish.

2. *What aspects of planning in a transitional setting are helpful in the search process?*

I think this depends a great deal as to what is revealed in the survey process. This could range from physical plant repairs/renovation, need for new construction that would face the new rector, or internal administrative systems that need to be revisited, tweaked, or overhauled. This could also include Worship service venue changes. All aspects of parish life can be identified either in the areas of honoring what exists and celebrating them, discerning what are problem areas that challenge the parish in transition and into their new relationship with new leadership coming, as well as dreams that they would like to see happen in the near future, thus setting the stage for the new leader to come on board with a well informed parish that is ready to go.

3. *What aspects of planning in a transitional setting are helpful to the new pastor?*

The "Ripe for the Harvest " process helps do just what I mentioned in the prior paragraph. It helps inform a parish of what areas are being done well, what needs to be corrected, and where do they want to go. All of this helps form an understanding of what kind of leader do they want.

I would hope that it would enable a well informed decision when the call process narrows candidates down for the final call. The rector candidates have a better knowledge of the good things, the challenges, as well as dreams and expectations of the parish, therefore able to see if their gifts and strengths, match up with the information provided by the parish. It also informs the search committee of what to look for in the new candidates during their interviews, and serves as an informed sense to sort out the "non matches" and ferret out the "right match".

4. *How have the roles of the governing body, transition committee, planning committee, and search committee been defined?*

Once again, I have used the "Ripe for the Harvest" process to comprehensively survey the entire membership, and then use that information to form or reorganize these committees so they respond to the stated need that surfaces.

This process "outs" the invisible elephants and gorillas in the room, as well as the hidden blessing that are going on within the community.

5. *What elements of the interim minister's role are particularly important in planning?*

I feel that the interims job is to help "clean and re organize the house" by giving the existing members and especially their lay leadership, the needed information, as well as incentive to make needed changes that can help their parish, buildings, programs and internal health be in a good place to discern, as well as receive their new clergy leadership. It also cultivates an attitude that will embrace needed change, even change that will take a long term, collective effort into the new tenure of the called priest.

6. *How have you related the developmental tasks to the planning process?*

Ripe for the Harvest sets a biblical standard from the Great Commandment and Great Commission, but also allows flexibility and change to occur.

It is based also on Quality Theory and best practices. The process invites a comprehensive mass of input from the membership, they also prioritize the importance of the issues offered, and then are enlisted to empower themselves and to make the needed changes. This process lowers the hierarchical peak of leadership, narrows the communication gap that normally exists between leadership and the masses, as well as offers known information to be discussed and placed into healthy planning processes and therefore, successful development that both, clergy and lay can celebrate, and continue to improve into their future working relationship.

When you get back and have a place and time that we can sit, I can go much further into details as to why this process works, as well as what it is built upon. It has worked every time in my consulting applications. (Now over 40 parishes)

**Response of The Reverend George Martin
Interim Rector, St. Margaret's Episcopal Church
Palm Desert, California**

From: George Martin <geoinmn@frontiernet.net>
Sent: Monday, September 7, 2009 10:46 AM
To: "Ronpogue@Sbcglobal. Net" <ronpogue@sbcglobal.net>
Subject: interim ?s

1. How have you found visioning/strategic planning with churches in transition between pastors to be different than in churches with settled pastors?

In my experience I keep encountering “Father Knows Best” churches, where any planning might have been done by the Rector, but rarely if ever in a process that truly involved others, or really cared about data and strategy. What the rector wants may lead toward certain things being done correctly in the eyes of a pastor who leads with his or her theological assumptions, but it clearly isn't an organizational development strategy.

2. What aspects of planning in a transitional setting are helpful in the search process?

Any planning is probably new to many churches. Sad, but true. It probably involves basic planning about when reports are due, and when we get stories into the newsletter. So many churches operate with a “last minute will do” attitude. Many a church secretary has worked late on a Friday afternoon printing the bulletin because someone didn't decide at the last minute about some lesson, some music, or their sermon title.

Advance planning in terms of getting a jump on big celebrations is rare, but can be a most valuable lesson to the congregation.

The best lesson is to get lots of lay involvement in planning and decision making. This may be a problem if the church repeats a pattern of calling an autocratic leader, but they are less likely to try that after experiencing a share in direction in which the parish heads.

3. What aspects of planning in a transitional setting are helpful to the new pastor?

Clearly it helps if there are procedures and processes that are rational, that make a good use of time, and which allow for details to be covered. The lack of planning that infects many congregations leads to sloppiness and a casualness that hardly represents the best we have to offer. Good planning raises the water level, as it were, and many things in a parish will improve along the way. All of this will greatly assist the new pastor.

4. How have the roles of the governing body, transition committee, planning committee, and search committee been defined?

This is an area where the transitional pastor must ask lots of questions. Meet with people. Hear their stories about what happened when they had a criticism or a new idea to offer. How have

job descriptions melded together to create an organization with a focus on mission. Do people ask “Why” when they make decisions. Are people thinking about the purpose in either “Doing what we’ve always done,” or in trying something new.

5. *What elements of the interim minister’s role are particularly important in planning?*

I think it begins with transparency and willingness to listen and to learn. It involves a respect for the traditions in the parish, but also a willingness to question those traditions if they are inhibiting growth and development.

I think the interim pastor needs to be available and accessible in a way that many clergy in the past haven’t been. Guarding your phone number and your day off only signals a church that you aren’t to be bothered.

Send signals to everyone that you’ll be doing advanced planning. For me it begins by talking about the lessons that are coming up and how they need to inform a little of the shape of worship. Make sure that Easter and Christmas are planned three or four months ahead of schedule at a minimum.

6. *How have you related the developmental tasks to the planning process?*

This question can only be answered with regard to the specific issues facing a congregation. The interim pastor must decide what needs attention at that very moment and which issues will only be named and left for the settled pastor.

In one church I worked on the Youth Ministry, giving lots of direction and personal attention to the present leaders of that ministry, but knew that I was only setting the table for the settled pastor who subsequently let that set of leaders go, while calling a Youth Pastor from within the denomination. The other group of leaders were almost leading youth out of the Episcopal church, and had almost no understanding or appreciation of our traditions.

The interim pastor, with a pre-fired status, can ask all kinds of probing questions and offer some brutal and honest assessments. This isn’t a time to necessarily fix everything, because time doesn’t allow for that to happen. But you can set the stage for a new kind of honesty, and the calling committee can in turn share these insights with prospective candidates.

What’s often missing? It’s evaluation. It helps if there is an evaluation process set up for the interim and the board. It’s there in most contracts these days. We just need to extend this idea to everything we do asking “Did this work? Why? How? Why not?” The evaluation needs to be done in light of our sense of mission and especially who we are serving, and how what we do best represents the God we serve. Then notes need to be taken after an event so that we don’t repeat the same mistakes over and over again. Evaluation needs to include staff members in a way of mutual ministry as we seek to ask how we’re doing in ministry. We also need to welcome input from others. We live in a meritocracy where everyone already has an opinion, where they are talking to their neighbors, and where they talk with their feet when they walk out on us.

Appendix II

Guiding Principles to Strategic Planning

1. The planning process must belong from the outset to those who will approve and implement it. The consultant's role is to advise, support, and facilitate, not to manage the process or direct its outcome.
2. The key to the process is a strong planning team composed of persons who are open to discern what the congregation is called to be and do; who understand the political realities; and who understand the value of open deliberations and the need for a redundant system for keeping the membership informed.
3. Early in the process, the planning team identifies a group of "driving questions" and presents them to the governing Board for endorsement. It is essential that the leadership feel a sense of urgency about addressing the driving questions.
4. Data collection should be focused on data that will help to answer the driving questions, and designed to make collection and interpretation manageable.
5. Both internal and external data should be gathered. Internal data includes feedback from the membership considered both as "consumers" and "producers." External data includes information about the local community and the larger social and religious context.
6. Strategic Planning requires both wide participation and deep integrative thought. This tension is best maintained by a cohesive Planning Team that reaches out several times during the planning to keep the membership contributing to and learning from the process.
7. Institutional health requires a clear understanding of the mission and common covenants about behavior. Ordinarily the best time to attempt to clarify these is after the internal and external data gathering are complete. Statements of mission and covenant should be richly informed by the faith tradition.
8. A written plan with specific recommendations or action steps is one important outcome of the planning process. At least as important is the process itself—the Planning Team's success at getting the membership to feel urgency about the Driving Questions and to grapple seriously with them.
9. A good plan will suggest things the institution should not be or do. Unless a plan provides a basis for selecting a short list of priorities and setting others aside, it will not affect the institution's future.

Adapted from the writings of Alice Mann, Gil Rendle, Roy Oswald, and Others as displayed on the Holy Conversations website (<http://www.alban.org/holyconversations/principles.asp>), September 2009.

Endnotes

- ⁱ Rendle, Gil, and Alice Mann. *Holy Conversations*. <http://www.alban.org/holyconversations/process.asp>. 7 Sept. 2009.
- ⁱⁱ Rendle, Gil, and Alice Mann. *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations*. Bethesda, MD: Alban Institute, 2003. p. xii.
- ⁱⁱⁱ Ibid, p. 12.
- ^{iv} Rendle, Gil, and Alice Mann. “Guiding Principles.” *Holy Conversations*. <http://www.alban.org/holyconversations/principles.asp>. 7 Sept. 2009.
- ^v Goldacker, Gary. Appendix I of this document.
- ^{vi} Hornaday, Evelyn. Appendix I of this document.
- ^{vii} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^{viii} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^{ix} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^x Hornaday. Op. cit.
- ^{xi} Goddard, John. Appendix I of this document.
- ^{xii} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^{xiii} Rottgers, Steve. Appendix I of this document.
- ^{xiv} Hotchkiss, Dan. “Getting Unstuck,” *Holy Conversations*. <http://www.alban.org/holyconversations/unstuck.asp>. 7 Sept. 2009.
- ^{xv} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^{xvi} Rendle, Gil, and Alice Mann. *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations*. p. 89-90.
- ^{xvii} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.
- ^{xviii} Rendle, Gil, and Alice Mann. *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations*. p. 86.
- ^{xix} Martin, George. Appendix I of this document.

^{xx} Rendle, Gil, and Alice Mann. “Guiding Principles.” Op. cit.

^{xxi} Martin. Op. cit.