

Resolution Task Force on Transitional Ministry

Report to the Synod Assembly

May 8, 2015

Part I Resolution

1. A Resolution (Addendum A) was passed by the 2014 Synod Assembly charging the Synod's Transitional Ministry Development Team (TMDT) with six tasks:
 - a. Review and evaluate the Synod's present model for interim ministry.
 - b. Examine models used by other synods (and their perceived effectiveness).
 - c. Make recommendations about our Synod's interim ministry process with the purpose of expanding options for congregations entering transition.
 - d. Actively solicit input from laity and clergy from congregations who have undergone a pastoral transition within the past two years (as well as other lay members and clergy).
 - e. Seek input from multicultural and secular sources.
 - f. Provide a report to the Synod Council before the 2015 Synod Assembly and also to the 2015 Assembly.

Part II Review of the Current Process

1. Intentional Interim Ministry is both a process and a service that the SEPA Synod provides for congregations transitioning between pastorates.
 - a. It recognizes the interim period as a tender and critical time when congregations are full of both hope and uncertainty and preoccupied with making peace with their past while planning and preparing for their future.
 - i. If effectively managed in a positive and productive manner, congregations are much more likely to leave the interim period feeling renewed and ready for the future God desires and has in store for them.
 - b. The pastoral transition process serves as a navigational tool for congregations to use as they discern what God is calling them to be and do and what qualities and gifts they need in a pastor to journey with them in answering that call.

- c. The Office of the Bishop is a travelling companion and provides congregations with resources and support (information, materials, and people) throughout their journey.
2. Since 2007, oversight for the development and continual refinement of the Synod's Interim Ministry process and resources has resided with the Transitional Ministry Development Team (TMDT).
 - a. The TMDT is comprised of experienced Interim Pastors as well as lay members who have served their congregations during a pastoral transition. Pr. Ellen Meissgeier (Director of Mobility) chairs the TMDT with the assistance of Pr. Marcia Bell (Interim Ministry Dean).
3. The transitional process developed by the TMDT for the SEPA Synod is based on the established theories and best practices in change and systems management espoused by the Interim Ministry Network (IMN) in its training programs.
 - a. It is a carefully crafted process consisting of four phases:

Phase #1 - **Pastoral Vacancy** (from the announcement of a pastoral departure until the Interim Pastor arrives)
 Phase #2 - **Congregational Self-Study & Visioning** (from the arrival of the Interim Pastor until the submission of the Mission Site Profile)
 Phase #3 - **Call Process** (from the submission of the MSP until the calling and arrival of the new pastorate)
 Phase #4 - **Implementation** (living into the congregation's vision with the new pastor).

4. The TMDT resource, *Pastoral Transition: A Guide for Lay Leaders*, serves as a roadmap for congregational lay leaders journeying through the transition process. It walks them step-by-step through all four phases and provides them with internet access to useful tools and forms along the way. The full guide is on the SEPA Synod website and can be viewed and/or downloaded at <http://ministrylink.org/equipping/resources/pastoral-transition-guide>. Five key pages from the guide appear at the end of this report to serve as a preview--A Message from Bishop Burkat (Addendum B), Table of Contents (Addendum C), Introduction (Addendum D), Transition Process Flowchart (Addendum E), and Brief Overview of the Four Phases (Addendum F).
5. The SEPA Synod's transition process was designed for flexibility in addressing the unique circumstances and needs of a congregation.
 - a. While the ultimate destination--calling a new pastor--may initially be the same, the itinerary is subject to change as necessary.
 - i. Discoveries and events at any juncture in the journey may warrant a congregation to linger a little longer in some places, to take a detour in others, and perhaps even to change its desired destination.

6. There is a creative element to the process and it is continually being refined by the TMDT to keep it respectful of as well as relevant and responsive to the distinctive character and needs of the Synod's diverse congregations.
 - a. As part of its work, the TMDT solicits and responds to feedback from congregational lay leaders and Interim Pastors near the end of the interim period.
 - b. The TMDT is also attuned and responsive to the effects of the changing religious landscape on the vibrancy and viability of congregations throughout the SEPA Synod.
7. The SEPA Synod has about two dozen trained and experienced Interim Pastors whose skills are honed and whose work is reviewed and supported on an ongoing basis.
 - a. Interim Pastors are required to report quarterly to the TMDT on the progress being made and/or challenges being faced by the congregations they are serving, they are encouraged to take advantage of continuing education opportunities such as those provided by the IMN, and they attend bi-monthly consultations with their peers.
 - i. The level of accountability and specialized training Interim Pastors are held to in the SEPA Synod exceeds that of other rostered leaders

Part III TMDT Response to the Resolution

1. The first course of action was to meet with several of the signers of the original resolution that was presented to the 2014 Synod Assembly. This gave the TMDT the background and basis for the resolution, including examples from specific interim situations.
2. The TMDT assembled a task force by August 2014.
 - a. It was chaired by a lay person, Teri Lanan, and consisted of the Synod's Director for Mobility (Pr. Ellen Meissgeier), the Interim Ministry Dean (Pr. Marcia Bell), two experienced Intentional Interim Pastors (Pr. Jeff Ziegler and Pr. Dick Mathisen), a currently settled and former Interim Pastor (Pr. Sue Lynch), and three other lay members (Art Beck, Barry Stock, and Shirley Baker). Pr. Lynch and Shirley Baker eventually chose to resign because of time constraints.
3. The Task Force first met on 9/11/2014 at which time we developed a process and timeline for guiding our work leading up to the 2015 Synod Assembly.

4. The process involved three major tasks:
 - a. Data & Discourse - the task force solicited information from lay leaders and pastors who have worked through the pastoral transition process within the last two years.
 - i. We sent an online survey to the Council Presidents, Transition Team Chairs, and Call Committee Chairs who served the 13 congregations that had undergone and completed a pastoral transition sometime between 2012 and 2014.
 - ii. However, because there were fewer responses (8) than hoped for from the small pool of survey recipients (36), the task force relied mostly on the information and input collected by the TMDT members over the past two years during their final evaluations with the lay leaders and Interim Pastors of those 13 congregations.
 - iii. We held a roundtable discussion with the Synod's Interim Pastors during their Interim Consultation on January 14, 2015. We followed up by sending them a questionnaire that they completed and returned via email.
 - iv. Task force members did internet research and contacted other synods to learn about alternative interim model(s) being used by other ELCA synods.
 - b. Collaboration & Conclusions - the task force members vetted and distilled the information collected from other sources and from our collective experiences with pastoral transitions to isolate the strengths and weaknesses of the current process and to formulate our recommendations for enhancing the transition process.
 - c. Drafting & Reporting - the findings and recommendations were compiled and composed, reviewed and revised, and submitted as a written report and verbal presentation to the Synod Council on 4/16/15 and to the Synod Assembly on 5/8/15.
5. Early in the process, the Resolution Task Force had lengthy discussions about the merits of seeking input from secular sources as called for by the resolution but decided not to pursue it.
 - a. The approach to effecting leadership change in the church and society are markedly different. Secular leaders are promoted to positions by their superiors because of their past performance and a preconceived plan of succession. Pastors, on the other hand, are "called" to a congregation by its members because of the promise they hold for the future and the mysterious movement of the Holy Spirit. Hence, seeking input from the secular domain on how to

effect leadership change in the church seemed much like studying apples to learn about beef.

6. The resolution also called for input from multicultural sources; therefore, the Task Force sought information about some pastoral transitions that have occurred in congregations where the majority of members are people of color or where there is currently a service in a language other than English.

Part IV Results

1. The Task Force recognizes that there is a lack of trained Interim Pastors on the SEPA Synod's roster who are persons of color or fluent in a language other than English and that pastoral transitions may be more complex in multicultural congregations for a variety of reasons.
2. Like the SEPA Synod, the majority of synods in the ELCA utilize Intentional Interim Ministers, provided that the necessary resources are available (a pool of specially trained Interim Pastors and/or consultants and sufficient congregational funding to support one.)
 - a. The Intentional Interim Ministry approach is particularly helpful under certain circumstances such as a long pastorate, pastoral misconduct, conflict within the congregation, and changing demographics or cultural shifts.
3. In the absence of the necessary resources, a synod may borrow an available Interim Pastor from another synod or Full Communion Partner. In addition there are times when an Interim Consultant and a Bridge Pastor may work as a team.
 - a. For some synods, we discovered that there is little or no formal process and often retired pastors were asked to fill in until a settled pastor is called.
 - b. While researching how other synods in the ELCA are doing Interim Ministry, the Resolution Task Force discovered that few have anything like a Transitional Ministry Development Team in place to oversee and coordinate the transition process in congregations.
 - c. One synod using a comprehensive model similar to ours is the Florida Bahamas Synod. In addition to looking at their process we asked them to review our ***Pastoral Transition Guide*** and to offer a critique.
4. In spite of the TMDT's efforts since its establishment in 2007, Interim Ministry as it is currently practiced in the SEPA Synod calls for clarification.
 - a. Intentional Interim Ministry in the SEPA Synod is a flexible process that is constantly being refined to meet the changing needs and challenges congregations face, yet there is a presumption from the past that it is a rigid,

one-size-fits-all model that is imposed upon congregations by the Office of the Bishop.

- i. Even the language used in the 2014 Resolution hints at the misperception: *"BE IT RESOLVED THAT the synod Transitional Ministry Development Team review and evaluate our present **model** for interim ministry...with the purpose of **expanding options**" for congregations..."*
 - ii. Until congregations actually enter a transition and begin to work with the Office of the Bishop and an Interim Pastor, their expectations of the process and their initial willingness to use and embrace it to their full advantage may be somewhat jaded by recollections of a pre-TMDT interim experience. It is telling that in the survey sent to lay leaders involved with their congregations' pastoral transitions, 50% responded that the interim process Slightly Exceeded their expectations. Also, TMDT members report that congregational leaders often admit to them during final evaluations that at first they did not like the idea of an interim process, but their minds were changed during and by the experience.
5. When the transition process is followed, the congregational leaders tend to be satisfied with the outcomes.
- a. The few lay leaders who completed the online survey reported that they followed the process Completely (33.33%) or Mostly (66.67%) with 87.5% of them reporting that the process Definitely resulted in the calling of a suitable pastor. In another question, 75% reported being Exceedingly (12.50%) or Very (62.50%) satisfied with the overall results of the process.
 - b. In addition, the Interim Pastors and congregational leadership in most instances are positive and supportive of the interim process during the final evaluations.
6. The quality of support and the usefulness of the **Pastoral Transition Guide** offered by the Synod are always in need of improvement and updating. It is the TMDT's policy to review the **Pastoral Transition Guide** annually and revise it accordingly to reflect the feedback from and experiences of the congregations.
- a. 75% of the lay leaders responding to the survey rated the quality of the support they received from the Synod as Very Good (37.5%) or Good (37.5%), but the other 25% rated it as Okay (12.5%) or Poor (12.5%) which reflects the same mixed reviews that the TMDT members say they receive during their final evaluations.
 - b. When asked specifically about the usefulness of the **Pastoral Transition Guide** in each of the four phases, 66.66% of the respondents rated it as Very Useful (33.33%) or Sufficiently Useful (33.33%) for all four phases, and 16.67% rated the

resource as Exceedingly Useful for phases two & three. However, another 16.67% didn't use the resource at all for phases two & three and 33.33% didn't use it for phases one & four. In another question, 25% of the respondents said that they were not even aware that such a resource exists. Again, the survey results more or less echo what the TMDT members hear from the congregational leadership during the final evaluations.

- c. The TMDT members also report that they often hear in the final evaluations how difficult it is to find the ***Pastoral Transition Guide*** on the Ministry Link Website.
7. There is some dissatisfaction with the perceived length of time it takes to complete a pastoral transition. A careful analysis of the time period from which a pastor resigns or retires and another called pastor is in place revealed that a pastoral transition can be as short as 6-9 months or as long as 18-24 months and that it is usually Phase 3 (Call Process) that accounts for the additional time (sometimes as long as 9 months to a year).
 8. There has been a proliferation of congregations in transition over the past few years; and, with the projected increase in the retirement of pastors over the next few years, there is reason to believe that the trend will likely continue.
 - a. Since 2009, roughly 75 congregations in the SEPA Synod have been served by our Interim Pastors.
 - b. At the end of 2014, 27 congregations were in some stage of the transition process, 14 of which were interviewing pastoral candidates. When the March 2015 ***Ministry Link*** edition was produced, 1 in 5 congregations in the Synod were in transition.
 - c. Also, more and more "at risk" congregations (those whose viability is tenuous because of dwindling membership and/or financial reserves) are entering the transition process without the necessary financial resources to support an Interim Pastor or Consultant or the human resources needed to do the transitional work required of congregations.

Part V Recommendations

Based on our findings, the Resolution Task Force offers the following recommendations:

1. The Task Force recommends that the TMDT find ways to improve the initial communication with lay leaders when their congregation enters into a pastoral transition so that they are more informed about the process, their role in it, and the resources available to them and, consequently, better equipped for leading their congregations through a successful transition.

2. Since the Conference Deans serve as a primary and key connection point between the Synod and the lay leaders of congregations in transition, the Task Force further recommends that, upon entering the office of Conference Dean, they be provided with some in-depth training on the pastoral transition process and available resources to better equip the Deans for this crucial responsibility and to build more consistency into the system between and among the different conferences.
3. The Task Force recommends to the TMDT that the ***Pastoral Transition Guide*** be more prominently placed and more readily accessible on the Ministry Link website so that it can be readily accessible and consulted more by anyone.
4. The Task Force further recommends that the TMDT consider expanding the information and resources contained in the ***Pastoral Transition Guide*** for Phase Four (Implementation) to increase its use by and usefulness to lay leaders in their ongoing efforts to advance the congregation's vision with the new pastor.
5. The Task Force recommends that the TMDT explore additional ways in which lay leaders who have experienced a pastoral transition can be utilized throughout the process to provide ongoing support for lay leaders experiencing it for the first time and for Conference Deans serving multiple transitioning congregations simultaneously.
6. The Task Force recommends that the TMDT study ways for the Office of the Bishop to better serve the specific needs of multicultural congregations in transition, including the possibility of recruiting interim pastors and consultants who are persons of color and who are fluent in languages other than English.
7. The Task Force recommends that the TMDT explore ways to assist "at risk" congregations in transition whose limited resources present additional challenges, concerns, and complications during the interim period.

On behalf of all the entire Resolution Task Force, I thank the Synod Assembly for giving us even more reason to access, enhance, and share the SEPA Synod's Pastoral Transition Process.

Respectfully submitted,

A handwritten signature in cursive script that reads "Teri Lanan".

Teri Lanan, Chair of the Resolution Task Force

ADDENDUM A

Southeastern Pennsylvania
Synod 27th ANNUAL
ASSEMBLY
May 2-3, 2014
Franconia Mennonite Church, Telford, PA
God's Work. Our Hands.

Transitional Ministry

S. A. 14.05.07 BE IT RESOLVED THAT the synod Transitional Ministry Development Team review and evaluate our present model for interim ministry, examine models used by other synods (and their perceived effectiveness), and make recommendations about our synod's interim ministry process with the purpose of expanding options for congregations entering transition; and,

BE IT FURTHER RESOLVED THAT the synod Transitional Ministry Development Team actively solicit input from laity and clergy from congregations who have been involved in the Interim Ministry process in the past two years, as well as other lay members and clergy, and seek input from multicultural and secular sources; and

BE IT FURTHER RESOLVED THAT the synod Transitional Ministry Development Team provide a report to the Synod Council before next year's Synod Assembly and to the 2015 Synod Assembly.

Action: Refer to the Transitional Ministry Development Team.

ADDENDUM B

*"To everything there is a season, and a time to every purpose under heaven."
Ecclesiastes 3: 1*



If you are reading this *Pastoral Transition: A Guide for Lay Leaders*, then it is likely your congregation has entered a new season, a time to say goodbye to your pastor, a time to reflect on the past history of your faith community, a time to discern God's purpose for future ministry, and a time to call a new spiritual leader to enter and to journey with you through this new season. The time of transition is rich with opportunity to explore how this interim period may be a blessing to your congregation and to the community you serve in the name of Christ.

The Southeastern Pennsylvania Synod of the Evangelical Lutheran Church in America has for many years worked to build on the collective wisdom, experiences and skills of specifically trained pastors for the practice of transitional ministry. These Intentional Interim Pastors, called to serve your congregation for a season of discernment, have expertise in helping congregations to grieve the loss of the former pastor in a healthy way and then to embrace the imagination, possibilities and hope that the Holy Spirit uses to turn our attention forward in mission. They will guide your congregation through a process outlined in this *Pastoral Transition: A Guide for Lay Leaders*. The details of the process will vary depending on the congregation. This is done with the collaboration of a dedicated group of lay and rostered leaders, the *Transitional Ministry Development Team*, who oversee the interim work in our Synod.

Our interim pastors are gifted leaders who are called to this ministry by the Synod Council, meet regularly for collegial support and discussion of best practices, and help you through the steps necessary to identify and welcome your next pastor. I am pleased that the Southeastern Pennsylvania interim pastors and *Transitional Ministry Development Team* are renowned throughout ELCA and ecumenical circles for their skills in moving congregations through healthy change in leadership.

May your congregation be blessed with trust, insight, discernment, hope and joy in serving Jesus Christ and His Church in this *season under heaven*.

In His Holy Name,

+ *Claire S. Burkat*

Claire Schenot Burkat, Bishop

ADDENDUM C

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ADDENDUM D

Introduction

Welcome

When a congregation loses its pastor, it enters into the "interim period" – the period of time between two regularly-called pastors. The interim period may be difficult for the congregation as it grieves the loss of the previous pastor and enters into a period of uncertainty. However, the interim period can also be a very positive and productive time for the congregation, as it re-examines its reason for existence and seeks to discern God's calling and purpose for it in the future.

The congregational lay leadership may understandably feel it is facing a challenging and unfamiliar new task. It is helpful then to remember that the congregations and other ministries of the Southeastern Pennsylvania Synod (SEPA Synod) "walk together." The congregation whose pastor is leaving is not alone. The Synod has resources to help a congregation at such a time. With a specially-trained intentional interim pastor, and using tools and approaches based on current research and the best methods available, the congregation will be helped to journey through a carefully-designed interim process.

A flowchart of the entire transition process is shown on page 7.

Understanding this Guide

Written to assist a congregation's lay leadership after a pastor resigns, this Guide is one of the resource provided by the Synod for congregations during the interim period.

There are two layers of information in the Guide:

- Introduction and Phase Steps – a brief introductory overview of this Guide and of the four phases of the transition process, followed by a step-by-step description of the details of each phase, and
- Resource Documents – a collection of documents, forms, samples, and additional information that are used in each phase.

Getting Started

It is recommended that when a congregation knows it will be entering a time of pastoral transition, this Guide immediately be printed and made available to the Congregation Council. It is a rich resource to return to again and again throughout the entire interim period, from the first announcement of the pastor's resignation to the welcoming of the new pastor.

Throughout this Guide the additional materials in the Resource Documents are noted as follows:

MORE: • [Two Most Common Mistakes](#) Page 16

On-Screen Reading of the Guide

As an alternative to printing, the Guide may be read on a computer screen. It can be downloaded from the SEPA website:

ministrylink.org/ministries/vocations-and-leadership/pastoral-transition/

For this approach, all of the titles in the "MORE" boxes are links to the named Resource Documents.

Additionally, many navigational tools for moving from page to page are available for either Windows PC or Mac users. However, to gain access to these tools, the Guide must be downloaded and opened on the local computer, rather than read on the website. For Windows PC users, the Guide will download into Adobe Reader. Windows PC users can make sure they have the most current version of Adobe Reader by downloading it free from:

<http://get.adobe.com/reader/?promoid=DINRS>

For Mac users, the Guide will download by default into Mac's Preview software.

Perhaps the quickest and easiest navigational method of all is this one:

WINDOWS PC USERS: After clicking a link to another page in the Guide, to return to the location from which you clicked, use the keyboard shortcut:

ALT+Left Arrow

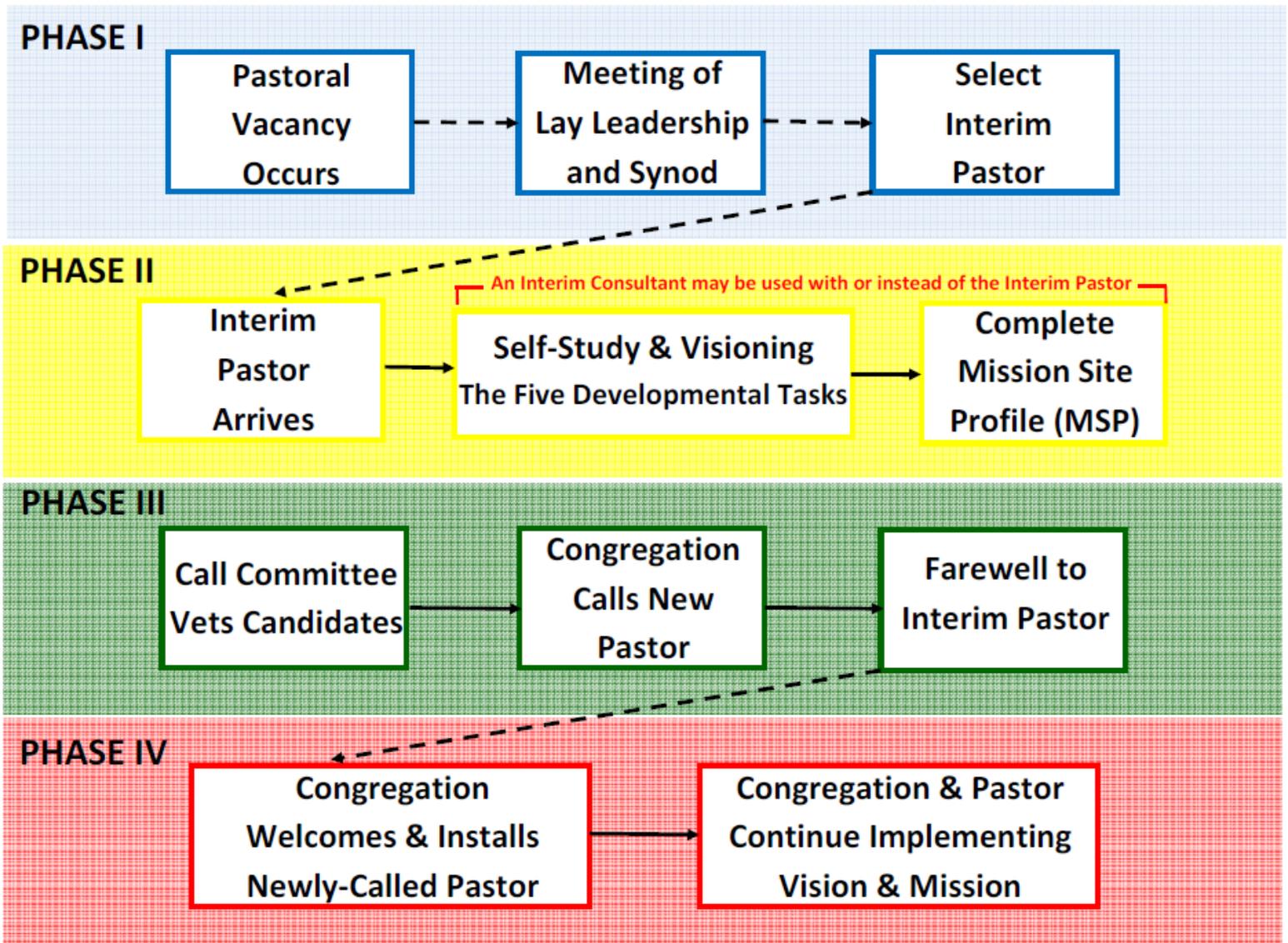
(Along with **ALT+Right Arrow** it is easy to move back and forth between the two locations.)

FOR MAC USERS: The keyboard shortcuts are:

command+[along with **command+]**

ADDENDUM E

Flowchart of SEPA Synod Pastoral Transition Process



Dashed lines indicate where it may be necessary during the process to appoint a Bridge Pastor

ADDENDUM F

Brief Overview of the Four Phases

Phase One:

After a Pastor Resigns

Phase One of the interim process begins when a pastor resigns or departs for any reason. As a pastor leaves, it is important to find a way to say goodbye and to begin to define appropriate boundaries so that the congregation is able to receive another individual as the pastor.

If you are a congregation president or lay leader, Phase One describes the actions that should be taken by you in consultation with the Synod's Office of the Bishop in order to begin the process of selecting your next pastor. Phase One ends in the selection of a qualified Interim Pastor, as specified in the ELCA Model Constitution for Congregations (Section C9.06). In the SEPA Synod, we normally use a specially-trained pastor known as an *Intentional Interim Pastor*.

MORE: • [Importance of Healthy Boundaries](#) Page 17

Phase Two:

Self-Study & Visioning Process, Congregational Profile

Phase Two of the interim process begins with the welcoming of the Interim Pastor. The Intentional Interim Pastor will carry out the work of interim ministry by following a widely-accepted process known as the Five Developmental Tasks for a congregation in transition. The purpose of these tasks is to help the congregation conduct a study of itself and its situation, to develop a Vision of the future mission to which God is calling this congregation, and to discern the type of pastor and the pastoral characteristics needed to lead the congregation to fulfill that Vision. Phase Two concludes with the preparation of a package of material called the Congregational Profile, and its submission to and approval by the Synod's Office of the Bishop.

MORE: • [The Role of the Interim Pastor - Best Practices of Interim Ministry](#) Page 18

Phase Three:

The Call Process

Phase Three of the interim process is the Call Process. The Call Process begins when the Congregational Profile has been approved by the Synod's Office of the Bishop. At this point, the congregation selects a Call Committee. That Call Committee receives the names of possible pastoral candidates in a highly confidential process. After the Call Committee interviews pastoral candidate(s) and hears them preach, it eventually recommends one pastoral candidate to the Council. If the Council agrees, the Council calls a special congregational meeting; this is done in coordination with the Office of the Bishop which appoints a deputy to run the meeting. Normally, the pastoral candidate leads worship and preaches at a Sunday morning worship service, which is followed by the special congregational meeting as described in the congregation's constitution. If the congregation decides to issue a call to the pastoral candidate, and the pastoral candidate accepts, then he or she becomes the next regularly-called pastor of the congregation.

Phase Four:

Implementation with Next Pastor

Phase Four of the interim process is the final phase. Throughout the process the congregation has worked to develop its vision of the future to which God is calling it and has called the pastor it believes will lead it in pursuing this vision. Now the congregation welcomes this new pastor. This new partnership is celebrated with a formal installation service.

Rather than set aside the work of the transition process, it is important for the pastor and congregation to work on implementation together. The arrival of the next pastor is not a time when "things return to normal," but is a continuing part of transition. Throughout the Synod and beyond there are resources for congregations as they continue to live into the future to which God is calling them.