



Preparing for Ministry Leadership Transitions¹

Retirement sounds wonderful. And it sounds simple - pick a date, make an announcement a couple of months beforehand, go on a farewell tour or deliver a great speech, be honored at a reception, and then ride off into the sunset.

Except that it's not that simple, especially when a ministry has been led by the same executive leader for many years. In truth, these transitions, whether due to retirement or a move to a new position, are incredibly complex.²

Despite the complexity, these transitions need to be done well. The consequences of poor transitions are far-reaching. Obviously, the ministry itself – the staff and other constituents – will be affected. If the transition is bumpy, some people will leave and others will be demoralized. Financial support may decline. The end result can be reduced service by the ministry which translates into diminished impact for those that the ministry seeks to serve.

Healthy executive transitions in ministries require (1) an understanding of the complexity of transitions, (2) effective preparation within the ministry, and (3) effective personal preparation by the executive. There is also much work to be done after a new executive arrives, but this paper will focus on the essential and often overlooked preparatory work that needs to take place.

Understanding the Complexity of Transitions

Ministries, especially those that are large, are inherently complex organisms. Even in seasons of stable leadership, ministries have multiple stakeholder groups with distinct identities and strong opinions. Decision-making processes often rely on intuition, relational capital, and history as much as on formal analysis or structured processes. At the center of this is an executive or executive team (including the first chair leader) that holds everything together and provides the rest of the system with a sense of confidence and stability.

In difficult times – the departure of a dearly loved staff member, financial crisis, or controversial decision – a ministry is less likely to panic because they trust the executive to steer wisely through the storm. But what happens when the “difficult time” is the departure of the executive? Complexity increases. Three specific factors that make ministry leadership transitions complex are: (1) shifts among the ministry’s multiple stakeholders, (2) the rise of systemic anxiety, and (3) loss (or questioning) of organizational identity. While many other factors play a part in the complexity of transitions, these are particularly prominent.

Every ministry has multiple stakeholder groups. Some are formal (e.g., the board, staff, volunteers, constituents served by a specific program, geographic location). Others are less formal but clearly identified based on demographics (e.g., long-term donors, volunteers under age 35). Still others are less obvious but just as significant, such as a group that has been together on an overseas trip or that planned an annual fund-raising banquet together.

In times of relative stability, every group knows its role and “plays well with others.” But a retirement announcement removes that sense of stability for the ministry. Some stakeholders may try to step into a real or perceived leadership void, exerting more authority than they should. Others may withdraw, whether out of fear of conflict or uncertainty about what to do.

For example, key donors may be concerned about the ministry’s finances during a transition. It’s appropriate for them to express their concerns to the board or make additional contributions, but



it's not appropriate to insert themselves into the process for selecting the next executive. In contrast, a key committee³ may put all new plans on hold “because we shouldn't make any decisions until the new executive arrives.”

In a season of transition, a ministry needs to experience unified, steady leadership. And yet, the presence of multiple stakeholder groups and the nature of those groups can make this hard to achieve.

The second layer of complexity in executive transitions relates to and exacerbates the first. Immediately after the retirement announcement (or even before, if rumors get out), anxiety will spread through the ministry. The anxiety around transitions is greatest at the ministry's “center” – the executive, senior level staff, key leaders, and the executive's spouse. These are the individuals who will be most impacted by the transition and who feel that they have the most to lose. They will be pulled into more transition-related conversations – both formal and informal – which will increase the personal anxiety they feel. Because they have significant influence in the ministry in terms of decision-making and relational connections, their anxiety will ripple outward. It will next touch other staff, leaders, and friends, and will eventually make its way to a lesser degree throughout the ministry.

Experts explain in layman's terms that “anxiety makes people stupid.” Specifically, as people get anxious, they focus more on survival (“fight or flight”) than higher order thinking. They prioritize self-interest more than corporate concerns.

One of the essential characteristics of a healthy ministry is its ability to navigate and negotiate complex decisions among its multiple stakeholders. In the best cases, individuals and groups are willing to set aside their personal interests for the broader benefit of the body. They genuinely seek to discern where God is leading even if it is not their preferred path. This requires our brains and souls to function at their best. So just in the moment when the ministry faces increased complexity and needs wise leadership, anxiety shifts the collective intellectual and spiritual capacity of its leaders in the wrong direction.

The third factor that increases the complexity of executive transitions is a loss of identity for the ministry. Like it or not, the personality and culture of a ministry is heavily influenced by the person sitting in the first chair. This is less true in ministries that have strong leadership teams (staff and/or volunteer) or that are spread over multiple locations. But even in those cases, the executive is generally the person that shapes overall priorities, has the final say in decisions, guides the process for making decisions, defines positions on controversial issues, and much more.

“We've always done it that way” is one of the unofficial mantras in most established churches and ministries. When the executive has served for a decade or longer, that mantra is tied as much to the individual leader as to institutional traditions. Therefore, the imminent departure of that leader raises many questions about future identity: what will we continue to do (or stop doing)? What will we be known for? What will our priorities be? How will we make decisions?

Because these are core questions, the uncertainty about how they will be answered is unsettling for the ministry. When coupled with the presence of different stakeholders and the general anxiety, the ministry is ripe for rumors. A story may circulate that the next executive is unlikely to support a program that has a long tradition within the ministry. Or groups with different agendas that have had an uneasy truce under the current executive may see the transition as an opportunity to steer organizational identity toward their positions.



Organizational Preparation

The job of ministry leaders is not to eliminate complexity as they enter a season of transition. That would be impossible! Their job is to recognize this complexity and to *prepare* the ministry for what is to come.

Thoughtful and intentional preparation is a central theme of this paper. Just as complexity is unavoidable in ministries, leadership transitions are inevitable. You can't prevent the transition from occurring, but you can choose how to prepare for one. In many cases, the preparation for a transition is inadequate and too late. To be effective, ministries that are anticipating a leadership transition need to:

- Clarify the selection process
- Define roles – for the outgoing executive and for other leaders
- Communicate thoroughly throughout the ministry
- Address anxiety
- Discern the ministry's *future* needs
- Plan with the transition in mind
- Allow adequate lead time

Clarify the Selection Process

The question that dominates a ministry leadership transition is, "Who will our next executive be?" The reality is that the *process* by which the executive is selected is almost as important as the person. Said another way, if the staff and other constituents do not understand and have confidence in the process, the new leader will be at a distinct disadvantage from the start.

In most cases, the ministry's board will have responsibility for selecting the next first chair leader. (This may be different for denominational bodies or ministries that are part of a denomination.) But even if the ultimate responsibility clearly rests with the board, there are likely to be a number of questions about the process. Will a subset of the board function as a search team? Will people outside of the board (staff, other constituents) be involved in the selection decision, and if so, how? The answers to some of these questions may be spelled out in the by-laws or other formal documents. In many cases, however, the details of designing and communicating the process will be left to the board.

The ministry's board members and senior staff are often aware of the formal rules that will guide the selection process (or they quickly learn them once it becomes known that a transition is on the horizon). But that alone will not result in the clarity that is needed. Other leaders and constituents will make assumptions, often incorrect ones, about the process based on their outside experiences. In addition, if the executive has had a long tenure, the organization has little, if any, institutional memory of how leadership transitions occur.

In order to effectively clarify the selection process and pave the way for a smoother leadership transition, ministries should:

- Address the gray areas in advance. Before the transition conversation becomes public, leaders should review the rules that will govern the process (denominational and/or by-laws) and address points where confusion is likely. This may require amending the by-laws, but usually it just means defining the process in greater detail.



- Communicate the process clearly. Information about the selection process should follow soon after the announcement about the executive's planned retirement (or at the same time). Clear communication about the process will minimize the number of people saying "no one told us about ____" and maximize confidence in the process.
- Listen for confusion or pushback. No communication plan is perfect. Rather than getting defensive when people express concerns about the process, leaders should treat this as an opportunity to fine tune their communication.
- Specify how the ministry's constituents will be involved. In a democratic society, people assume that they will be involved in some way in the selection process. There are a number of ways to do this at different points in the process (e.g., surveys, focus groups, invitation to submit names of candidates, meeting the recommended candidate). On the front end of the process, it is important to describe if, when, and how the broader organization will have a voice in the decision.
- Continually look to God. The above points all focus on the mechanics of the process, but everyone in the ministry needs to remember that the process to select a new leader should be Spirit-led. This means that decisions that are "obvious" may not be right and that the timing can't be controlled. Everyone can support the process through prayer.

A specific scenario that adds complexity in transitions is when an existing staff member is seen as a potential successor. The phrase "seen as" in the prior sentence is important. The retiring executive may believe the staff member is ready to step into the first chair, but board members or key donors may not agree. In other cases, the board may be divided, or a segment of the staff may be resistant to having this person as their leader. The last thing that a ministry needs in a season of transition is for deep divisions to emerge in the selection.

These scenarios underscore the importance of clarity about the selection process. Questions about internal candidates need to be answered at the start of the process. These questions include: Will internal candidates be considered? If there is a strong internal candidate, will the board still feel obligated to consider outside candidates? If an internal candidate is not chosen, what are the expectations about his or her future with the ministry? There are not right or wrong answers to these questions, but a non-answer is certain to create confusion and division in the ministry.

Define Roles

As previously noted, large ministries are complex organizations with multiple stakeholder groups. In the shifting dynamics of a transition, it is essential that the roles of key groups be defined (or redefined). These include the board, the retiring executive, the staff, and key volunteers and donors.

The **board** of the ministry plays a vital role in the transition process. They will usually be responsible for establishing the process to find the next executive and for the final decision on who will step into the role.

As important as it is to choose a successor, that is not the only board responsibility in this season. They should be prepared to work with the retiring executive to define what his/her post-retirement role will be (see below). This should include setting appropriate boundaries for the executive's involvement with the ministry, and then making sure he/she stays within those boundaries. A well-intentioned but over-involved former executive can create chaos for the ministry and headaches for the new executive. The board is in the best position to set the boundaries and then intervene if problems arise.



The board should also create an overall transition plan. This may include a period of shared leadership between the retiring executive and the successor, with each having clearly defined responsibilities. It may include shifts in duties for other staff members. Ensuring financial stability for the ministry is an important element of the transition. The retiring executive may have been the chief fundraiser, especially in relations with key donors. The board does not need to take over the fundraising task or fill the financial gaps personally, but they should make sure that a sound financial plan is in place for the transition.

The transition period is a good time for the board to examine its own composition. While the uncertainties of a transition would seem to support continuity, this may be the exact time when new board members should be recruited. If the existing board is closely tied to the retiring leader, that could become a problem for the incoming executive. By the time of the leadership handoff, the board should include at least a few members who are independent of the outgoing executive.

The **retiring executive** faces the most significant role questions, both during and after the transition. One of the most important tasks is for the executive to set a date for his/her retirement. The lack of a firm date adds anxiety into the ministry and makes it difficult to initiate other parts of the transition process.

Once the transition is publicly announced, he/she may feel like a “lame duck” with nothing to do other than coast toward retirement. However, the executive may perform several important tasks during this season. These include:

- Using the influence of his/her position to ease anxiety among the ministry’s constituents.
- Being one of the primary communicators of transition plans, but also making room for other leaders who will still be involved post-transition.
- Helping leadership groups to negotiate their roles.
- Shepherding the staff, which may involve reassuring some who are nervous about the future and helping others decide that this is the right time for them to exit as well.
- Making changes that will pave the way for the next executive’s success.
- Leading a final initiative, whether a capital campaign or some other major push.

The retiring executive may have some involvement in selecting his or her successor, but this is a role that is particularly tricky to navigate. The executive has the best understanding of the skills and attributes that are necessary for the current role. But that understanding may not translate into a clear picture of *future* needs. Likewise, the retiring executive may bring a unique and valuable perspective on potential successors, especially internal candidates. The risk is that his/her involvement in the selection decision can carry too much influence and take the decision out of the hands of the board. In general, retiring executives should offer input, but they should not lead the process or be regular participants in selection-focused meetings.

During the transition, the retiring executive should also define what his/her post-transition role in the ministry will be. It is often advisable for the outgoing leader to completely disconnect from the ministry, at least for a period of time, to give the incoming executive room. This may seem severe, but even small reactions from the retired leader – a question about a choice, a brief look of frustration – can undermine the decisions of the new executive. The potential impact of these small actions is magnified when the retiring leader is also the founder of the ministry.

If the retiring executive is to maintain a connection with the ministry, then the boundaries need to be clearly defined. What role will he/she play and what are the specific expectations for this role? How often will he/she be physically present? For example, the retired executive may



remain on the board, but not as chair. In that case, he/she would not be expected to be in the office regularly or interact with the staff or “help” the new leader create the agenda for board meetings. Boundaries should be defined in advance based on input or guidance from the board (see above). Other post-transition role questions, as well as several other important personal issues for the retiring executive, are explored in the last section of this document.

Staff members are the third major stakeholder group to consider during the transition period. In a large ministry, individual staff members have significant leadership responsibility and closer connections than the executive with some key donors and volunteers. As noted earlier, transition-driven anxiety among these staff members can quickly spill into the larger body. Addressing their role questions can calm these emotions.

This group’s central question is, “How will the transition affect my job?” Even if they’re not concerned about losing their jobs, they will be concerned about whether they will relate well to the new executive and whether the transition will mean a new direction for the ministry or their particular areas of responsibility. The retiring executive, sometimes in conjunction with board representatives, should communicate with staff and set realistic expectations, but they should not make hollow promises (i.e., “You will have a job no matter who the next executive is.”) Another step to reduce anxiety is to keep staff in the loop as much as possible throughout the process.

Key volunteers and donors will also want to know how the transition will impact them. Individuals who have been involved with the ministry for a number of years may experience a sense of anticipatory grief or loss. As noted above, some committees or groups may be confused about their roles in a time of transition and may over- or under-function. In small or mid-sized ministries, many volunteers and donors will have a personal connection to the retiring leader, so it is natural for them to pull away during the transition unless proactive efforts are made to keep them engaged. For all these reasons, it is important to clarify volunteer and donor roles early in the transition process.

Communicate Thoroughly

Effective communication is one of the most important and powerful ways to overcome the potential pitfalls during a ministry leadership transition. Whenever information is lacking, rumors will rush in to fill the vacuum. This is not to suggest that every detail of the process needs to be communicated to everyone that is connected with the ministry. That is not practical or appropriate. But a well-designed communication strategy is essential.

Once a retirement date is made public, general updates should be shared on a regular basis. This should be done through newsletters (email and/or paper) and other established channels. A good rhythm for this kind of update is once a month. It’s important for leaders to remember each of the ministry’s different constituent groups and develop appropriate communications for them. The common denominator is that most of the people in these groups are not living in the middle of transition decisions and therefore are largely in the dark.

Staff and key leaders should be central to any transition-related communication strategy. The more that they know (within the boundaries of confidentiality), the more easily they can convey calm confidence to the rest of the ministry. Other constituents will ask for updates, so staff and key leaders need to be armed them with the right information and taught how to respond.

What kinds of things might be communicated during a process that is often long and mostly confidential? In the early stages, the communication should focus on the process (e.g., overview of the steps, responsibility for the selection decision). Near the end, the communication will focus on presentation of the new executive and transition plans. The middle, which is often



lengthy, is the most challenging time for communication because details of the work cannot be shared. Nevertheless, communication can include generic status updates (e.g., number of resumes received, narrowing of the list of candidates), desired characteristics for the next executive, plans to involve constituents (if any), responses to frequently asked questions, and prayer requests for the process.

The bottom line is that most ministries under-communicate during a transition. A proactive communication strategy is the only way to overcome this tendency.

Address Anxiety

Some anxiety is inevitable during a leadership transition, and it tends to be greater when the outgoing executive is beloved and long-tenured. But saying that anxiety is inevitable is not to suggest that it can't be addressed.

Anxiety in transitions is highest at the center of the organization and spreads contagiously to others, so it must be addressed first within the leadership core. Of course, this is difficult because the very people who would normally address such challenges may be part of the anxiety problem. Leaders (staff and volunteers) who have an active spiritual life and safe conversation partners (preferably outside the ministry) are much better prepared for the uncertainty of the transition. This is what can keep them from inventing and dwelling on worst case scenarios as they think about the future.

In addition to this spiritual foundation, several practical steps can reduce anxiety at the core. Leadership meetings should include time and space to talk about the emotions being experienced. These meetings are also a good place to talk about how to respond to questions and concerns from within the ministry. Without this discussion, leaders are more likely to give anxiety-laden responses that have unwanted negative impacts. Healthy leaders – those that are less anxious or at least self-aware and able to regulate their anxiety – need to step up in this season. They may confront anxious behavior or create safe places for needed conversations.

Beyond the core, effective communication and clarity about roles and process (as previously discussed) are essential elements for managing and reducing organizational anxiety. In addition, the ministry can be helped by:

- Naming the anxiety. There is no reason to deny that this is an unusual and anxiety-producing season. Better to acknowledge and then discuss how to deal with anxiety.
- Remembering the broader story. The leadership transition won't be the first time that the organization has experienced a significant change. Remembering moments when the ministry has overcome challenges can replace a "sky is falling" narrative with one of resilience and victory.
- Connecting to God's story. The most important way to address organizational anxiety is on a spiritual level. God's instruction to "fear not" and the reassurance of God's presence run throughout Scripture. Leaders and other constituents should be reminded of this frequently as they peer into an uncertain future.

Discern the Ministry's Future Needs

Discussions about future needs are a valuable way to engage the ministry's broader constituents in the transition process. These discussions are important input for those who are responsible for selection (e.g., what kind of leader do we need?) as well as for the staff, volunteers, donors, and others (e.g., what should we expect post-transition?)



Ministries that are large and reasonably healthy tend to have a default mindset as they face a leader's retirement, and that mindset is often a problem. It's a mindset that projects current or past needs into the future. The underlying logic is: (1) things are going well overall, so we don't need to make significant changes; (2) our retiring executive has led well, so this is a good model (leadership style, personality) for our next executive, (3) the biggest change that is needed is to "get younger" (regarding staff, donors, volunteers, and/or overall mindset); (4) therefore, our next executive should be a younger insider or a 25-year younger version of our current leader.

Each of these statements may have a strong ring of truth that can be supported by compelling evidence. And yet, if the ministry is unwilling to ask hard questions to examine what its real future needs might be, the next executive may simply preserve the past. In today's rapidly changing environment, that is rarely a recipe for future organizational vibrancy.

This is not to say that a ministry's past is irrelevant during a transition. "Future needs" should be based on the organization's DNA. If a ministry can articulate who they are at their core – which is about culture and values, not programs – then it can discuss how that DNA should be expressed in the future.

A serious exploration of future needs during a transition often encounters two other significant challenges. The ministry's core leadership may have been together for a long time, and therefore is closely tied to the outgoing leader and past ways of doing things. The transition is an important time to make sure that new and different voices are invited into the discussion about future needs. Second, as those new voices make suggestions about possible changes, their ideas may be heard as criticism of the current executive and other leaders. Rather than defending the past, leaders need to encourage vigorous discussion that can truly look to the ministry's future needs.

Plan with the Transition in Mind

During the months leading up to a transition, organizations often fall into one of two traps in their planning processes. The first is to allow the transition to become the only priority. Normal programming will continue, but any other ideas and initiatives get put to the side because "we'll be too busy with the transition" or "we don't know what the next executive will want." While staff and other constituents may be anxious about who the next leader will be, they still want to be part of a vibrant ministry that is making a difference in their communities and in the world. Putting all new ideas on hold sends the wrong signal.

At the other end of the spectrum are ministries that act as if the transition won't require any extra energy or attention. Their plans are full speed ahead. And yet, staff and other leaders won't have as much capacity during a period of transition.

The passing of a baton in a relay race is often used as an analogy for a leadership transition. The goal in the handoff is to keep the baton moving around the track as fast as possible. But every track coach knows that the runners can't go full speed during the handoff. If they don't slow down a little, they will drop the baton. That's how leaders should plan during a transition – don't stop initiating new things to keep the ministry moving, but realize that you will need to slow down to make a smooth, healthy transition.

Allow Sufficient Lead Time

It is clear that preparing adequately and thoughtfully for a leadership transition requires time. Sometimes a health crisis or sudden departure makes it impossible to allow this kind of preparation. But when a retirement or some other planned transition is in the works, ministries should allow at least a year for the steps leading up to the actual handoff. In fact, the search process alone may last longer than a year if external candidates are being considered.



What is happening during that year? Consider the illustrative timeline shown below. This timeline assumes that the retiring executive has already done the personal work to be clear about a retirement date. He or she may have discussed this with the ministry's leadership as well. A healthy, proactive process should include the following phases and specific activities:

- *Quiet Phase – a year or more before retirement:* engage formal conversations with the board about retirement plans, clarify the selection process with the board and possibly other leaders, develop a communication plan, define the ministry's future needs (as input to the selection process).
- *Public Phase – about 9 to 12 months before retirement:* announce the retirement date and selection process to the different constituent groups, provide additional information for staff and key leaders, take steps to address anxiety in the system, seek input regarding future needs from different constituents, begin the search process, encourage prayer, plan budgets and programs for the coming year (including the handoff).
- *Selection Phase – about 3 to 8 months before retirement:* continue to communicate with leadership and with other constituents, complete the search/selection process, announce the new executive to the ministry, prepare for the current executive's retirement, address any issues that will allow for a smoother transition for the new executive.
- *Handoff Phase – the last 2 months before retirement:* continue to communicate transition plans, celebrate the outgoing executive's retirement, welcome the new executive and begin the post-handoff part of the transition.

In truth, transition conversations generally start far more than a year before an executive's retirement. Key leaders are not unaware of the executive's age (at least roughly). As they wait for him/her to bring up the "R" word, they will talk among themselves about when and how a transition will occur. Executives will have private conversations with their spouse or a few close friends. But quiet conversations on their own don't result in healthy transitions. That can only happen with thoughtful and intentional preparation.

Personal Preparation for the Retiring Executive

The organizational preparation described in the previous section is essential for a smooth transition, but it's not enough. The retiring executive's personal preparation is much more than setting a date and defining his or her role for the final months at the helm. This preparation includes (1) initiating the conversation early, (2) discerning a post-transition role, (3) dealing with the transition emotions, and (4) practicing humility. If these vital activities are short-circuited, it will hurt the leader and the ministry.

Initiate the Conversation Early

For an executive who is approaching retirement, the first step of preparation is to begin the conversation. It sounds easy, but sometimes it's the hardest step. This does not mean a public conversation that will involve the organization. Rather, these are very private conversations that can help a leader untangle the complex thoughts and emotions that swirl around the topic of retirement.

The context and circumstances are different for each executive who is facing retirement. And yet, the central questions are generally quite similar: When is the right time to retire? How will I know if my leadership effectiveness has diminished and it's time to step aside? When should we broaden the conversation with the board and other leaders in the ministry? What can I do to



position the ministry for a transition? Can I afford to retire? What does post-retirement look like for me?

As noted in the previous section, these are the kinds of questions that need to be addressed long before the retirement countdown begins. They are complex questions that can't be answered quickly. And they are the kinds of questions that a leader shouldn't try to work out alone.

The executive's spouse is a vital partner in this conversation. After all, the decisions will directly affect both of them, not just the executive. But because of this, a spouse brings his or her own fears, anxieties, and blind spots into the conversation. That is why early discussions about retirement also need to include a few trusted friends. These could be long-time board members or friends of the ministry who have proven to be discerning and discrete. Or they could be other executives who have been through the retirement process. Or just close friends whose long relationship and deep love for the executive enables them to "speak the truth in love" in ways that few others can.

"Initiate" is a key word for this step. Board members and other leaders in the ministry may tiptoe around retirement questions, but they are generally hesitant to be direct. They don't want to be seen as trying to push out a beloved leader. The executive is often the one who needs to get the ball rolling, especially if he/she is the founder of the ministry. Those early conversations can take many forms, but two things should be clear: a leader's preparation for retirement needs to begin early, and it should not be a solo endeavor.

Discern a Post-Transition Role

One of the benefits of modern medicine is that many people can anticipate years of good health, energy, and productivity after they retire. Some leaders look forward to personal pursuits in their retirement years – more time with family, travel, recreational activities. Many executives, however, are ready to step away from the demands of leading a large ministry but can't imagine a life of total leisure. They want to find ways to continue using their gifts and experiences for Kingdom-minded endeavors.

For executives that fall into the latter category, it is wise to begin planning their "encore" ministry before they retire. The encore may range from minimal time commitments to full-time. It may involve doing some of the same things the executive was doing pre-retirement. For example, a retired executive may provide interim leadership or play an active role on the board of another ministry. But the encore may be completely different, such as coaching other executives, being more involved in a local congregation, or serving in a volunteer role in a different ministry.

There are several reasons to begin exploring encore options pre-retirement. An executive's connections are greatest while still on the job, and some of the people in that network can be valuable sounding boards for testing different encore ideas. The pre-retirement season can also be a good time to try small experiments with encore options. Of course, the last thing that a leader wants to do is to rush into a major encore commitment in this season, only to regret it soon after retiring.

Perhaps the most important reason to consider encore opportunities before leaving is that it changes how retirement is viewed. Retirement can be seen negatively as being "put out to pasture." This framing focuses on what the leader is leaving and losing. Any hint of this mindset will cast a pall over the entire process, making the executive and people in the ministry less enthusiastic about the transition. That loss of enthusiasm will often translate into a lukewarm embrace of the incoming executive. On the other hand, when the executive is excited about



whatever is coming next (whether that is purely leisure or some kind of encore), that enthusiasm will spill into the retirement conversations, setting the stage for a more positive transition.

Deal with Transition Emotions

Retiring after many years in ministry leadership is one of the most difficult transitions a person can go through. In any retirement, a person deals with questions of how to spend their time and how to make the finances work. But for ministry leaders more than any other profession, their career and their identity are intertwined. That means they're not just walking away from a job – they're leaving behind a large part of who they are. If retirement means cutting ties with the specific ministry, close relationships that they have nurtured for years will also be lost (or at the very least changed).

Needless to say, the months before and after retirement will stir up a variety of deep emotions – excitement and anticipation, but also anxiety, loss, grief, confusion, and even regret. Those emotions will be compounded as staff and constituents seek out their leader to express their own anxieties and other feelings about the upcoming transition.

This is not the time for a leader to “be strong” and push through. While that may have worked in the past, the transition is a season of uncharted waters that will provoke new and deeper emotions for the retiring executive. Instead, personal preparation should include developing a healthy place to deal with those feelings. Most likely that “place” will be a person or people. It may be a coach or counselor, or some of the same people that were involved in early conversations about retirement. It may be a small, trusted group of other leaders who are in the same stage of life and are asking the same questions. And of course, the “place” for wrestling with emotions should include a renewed and deepened reliance on spiritual disciplines.

Pastors have plenty of experiences with church members whose spiritual lives are characterized by “foxhole prayers.” These members have little need for God or the church until they encounter a crisis, and then they suddenly start praying, attending worship, and asking for pastoral counsel. Every pastor knows that these individuals would have been better able to deal with the crisis (or avoid it) with a more vibrant spiritual life. In the same way, executives in transition can't predict when the emotions and struggles of the transition will suddenly take hold. But they can prepare for these challenges by laying the right foundation in advance.

Practice Humility

The biggest underlying factor in successful ministry leadership transitions – and the most understated one – is humility. Humility is what enables the retiring executive to simply smile and walk away, rather than getting angry or defensive, when someone says how excited they are about the incoming leader. Humility allows the outgoing executive to ignore an ego-stroking invitation to comment on the new leader's changes in strategic priorities. Humility reminds the retiring leader it's not about him or her, but that the goal is a smooth and healthy transition for the ministry.

Practicing humility is an ongoing challenge in ministry leadership, especially for those serving in first chair roles in prominent organizations. The applause of colleagues and constituents, combined with the opportunity to offer life-changing ministries, has the potential to make anyone feel proud and self-reliant. But just as with many of the other issues described previously, the pulls on an executive's ego are different and are magnified in the transition season.

Changes are inevitable when a new leader follows a long-tenured executive. Sometimes the changes happen quickly, while other times nothing is changed for the first few months. The changes may be small and subtle or they may be major. But whatever the changes are and whenever they occur, the retiring executive is likely to feel at least a little jab to his or her ego. A



little voice will say, “They don’t value your years of work. They’re tearing down what you built.” On top of this, other normal parts of the transition, such as being out of the loop on routine communication or important decisions, can be perceived as further slights.

Changes and perceived slights are guaranteed in a transition. The unknown is how the retiring executive will respond. When given the opportunity to offer an opinion, will he or she speak? When an apparent offense occurs, will he or she give voice to the frustration that has been building?

In those moments, ego says, “Jump in. Your opinion still counts. You have wisdom to offer. You shouldn’t be ignored.” Even if retired executives resist the more obvious and inappropriate attempts to draw them in, the ever-present risk is that they will say something as simple as, “I might have done that differently.” But even that simple statement can sow seeds of doubt and division that will undermine the new executive’s authority. Great restraint is needed in these and many other situations. When ego says “jump in,” humility says, “I need to keep my opinion to myself. It’s OK if they do things differently than I would do.”

In *Good to Great*, Jim Collins describes a hierarchy of leadership. At the top, Level 5, is a leader who “builds enduring greatness through a paradoxical blend of personal humility and professional will.” Level 4 leaders are also successful during their tenure, but they lack this humility and they don’t build *enduring* greatness. Collins says that “Level 5 leaders set up their successors for even greater success in the next generation, whereas egocentric Level 4 leaders often set up their successors for failure.” Collins explains the mentality of the Level 4 leader: “What better testament to your own personal greatness than that the place falls apart after you leave?”⁴

This highlights not only the importance of humility but also the need for personal preparation. While the most dangerous ego triggers occur post-retirement, the time to set up the success of one’s successor is beforehand. Executives who are preparing for retirement will help the ministry understand that they are not indispensable. They can help the staff and constituents realize that changes will be made under a new leader, and that these changes are not an affront to the old ways. Retiring leaders should make a solemn commitment to support the new executive and not meddle in organizational decisions in any way. Their encore plans, the board, and their network of trusted advisors should help safeguard that commitment.

No amount of organizational and personal preparation will guarantee “enduring greatness” for a ministry in a leadership transition. It won’t even guarantee smooth sailing for the first few months after the leadership baton is passed. But it’s far better to prepare thoroughly and thoughtfully than to sail into the uncertainty of a transition simply hoping for calm seas.

¹ This paper is based on my transition consulting work with the leaders in congregations and other ministries, along with insights from my facilitation of a group of United Methodist pastors who were nearing retirement. The group was sponsored by Texas Methodist Foundation’s Leadership Ministry.

² “Ministry” is used in this paper as a generic term for a Christian organization other than a local church. This includes parachurch organizations, mission sending and relief organizations, and denominational entities. “Executive” or “executive leader” are used in this paper to refer to the person who fills the “first chair” role in the organization. Typical titles for this role include executive director, president, CEO, and bishop. The remainder of this paper will use the term “retirement” to refer to any departure by an executive that is planned well in advance of the transition date.

³ The structures for governance, decision-making, and volunteer involvement vary widely between different ministries. This paper recognizes the important role played by leadership/governance group(s) during a transition, but is not advocating a particular form of governance.

⁴ *Good to Great: Why Some Companies Make the Leap and Others Don’t*, Jim Collins, 2001.