Interim Ministry Training Manual

From...

To...

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Contributors

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Sections

Interim Ministry: A Brief Overview[1]

The word *interim* describes something in-between, transitory or temporary. The term *interim* can refer to,

1. an interim *time*,
2. an interim *minister*, and/or
3. an interim *congregation.*

Interim Ministry developed in the 1970's. Loren Mead from the Alban Institute and other clergy began to see special patterns happening in transitional / transitioning congregations. They formed a corps of *intentional* Interim Pastors to serve transitional congregations and help them with their specific issues.

The Interim Ministry Model speaks of several tasks, steps and stages:

1. The Five Developmental Tasks of the Interim Congregation,

2. The Five Process Tasks of the Interim Pastor,

3. The Seven Steps of the Interim Journey,

4. The Six Stages of an Interim Pastorate.

The Five Developmental Tasks of the Interim Congregation

There are five developmental tasks that "belong" to the *interim congregation.*

1. Heritage: Coming to terms with history,

2. Mission: Discovering a new identity,

3. Leadership: Facilitating leadership shifts,

4. Connections: Renewing denominational linkages,

5. Future: Commitment to moving forward.

The Five Process Tasks of the Interim Pastor

There are five process tasks that "belong" to the *interim pastor.* These process tasks are the "work" or responsibility of the interim pastor:

1. Joining the system,

2. Analyzing the organization as a system,

3. Connecting with the denomination,

4. Focusing and assuming responsibility,

5. Exiting and evaluating.

The Seven Steps of the Interim Journey

The seven steps of the interim journey that are happening in any transitioning congregation – *whether or not they have an Interim Pastor.* Whether a congregation uses the formal processes identified and codified by a COM Handbook or allows the process to move forward informally, these seven steps will occur:

1. *Period of Closure:* The Pastor announces his/her leaving, then departs.
2. *Direction Finding:* The congregation and leaders learn how to proceed to find a new pastor, (usually with help from the COM).
3. *Self-Study:* A mission study is done to see where the church is headed and what kind of leader is needed to go there.
4. *The Search:* A committee searches to find and nominate a Pastor for the congregation.
5. *Negotiation and Decision:* A decision is reached about one candidate and terms of call negotiated.
6. *Arrival and Installation:* The new Pastor arrives and begins their ministry, being installed into office, (if appropriate).
7. *Start-up:* The new Pastor and congregation begin working, defining roles.

The Six Stages of an Interim Pastorate

Allen Gripe describes five stages of an interim pastorate.[2] I have divided his second stage, Body of Work, into two distinct steps in the interim work of congregation and pastor.

1.	*Pre-entry*	3 days to 4 weeks	This is the negotiation and hiring period.
2.	*Entry*	6 weeks to 3 months	Get to know people, where the keys and bathrooms are.
3.	*Body of the Work I*	4 to 12 months	Evaluation and assessment leading to process change
4.	*Body of Work II*	3 to 6 months	Lead the congregational mission study
5.	*Exit*	1 to 2 months	Preparing the congregation to point forward, assisting with polity.
6.	*Post-Termination*	1 to 4 weeks	Supporting the new pastor's entry (only when requested), providing assessment to COM (if asked).

Anxiety in the Transitional Congregation

Interim congregations are *anxious* congregations. Anxiety can be *acute* or *chronic:*

1. *Acute* anxiety is brief and situational, focused on a temporary event, person, or decision.

2. *Chronic* anxiety is enduring and is not about a single event, person, or decision. For whatever reason the congregation is unwilling or unable to settle down and be calm.

When COM is visiting a congregation again and again over issues that, from an outsider's viewpoint, don't seem related or particularly significant, the congregation may be exhibiting signs of chronic anxiety. In this case, it may be most helpful to ask broad questions and avoid entanglements over current specific issues. The question to listen for is, "*What's really going on here?"* The interim pastor's responsibility in situations of chronic anxiety is to observe the congregation as a family system.

Transitional congregations are generally anxious about three main things: the past, the present, and the future.

1. Congregations have unresolved feelings about ***the past***,

- Unresolved feelings or even grief over the loss of the previous Pastor,
- Guilt over their feelings of *happiness* that the previous Pastor is finally gone,
- Past conflicts and problem behaviors.
- Did Presbytery help or hinder us?

2. Congregations have anxiety over ***the present,***

- Can we get an Interim Pastor now?
- What will the Interim Pastor be like?
- How are we ever going to get through this time?
- What changes will we have to endure and at what cost?
- Is Presbytery helping or hindering us?

3. Congregations have anxiety over ***the uncertain future,***

- How long is the transition going to take?
- When will a Mission Study begin?
- Who will serve on the Pastor Nominating Committee (PNC)?
- Will we lose people during transition?
- Will we like the called Pastor's sermons, style, voice, etc.?
- Will Presbytery help or hinder us?

An anxious congregation is most helped when,

- Pastors can remain non-anxious,
- Presbytery can remain non-anxious,
- COM can remain non-anxious.

Dick Coffelt, a former Stated Clerk of the Presbytery of Grand Canyon had a helpful saying: "There are No Ecclesiastical Emergencies." Remembering this axiom is helpful toward remaining non-anxious. For the interim pastor or COM liaison, Family Systems Theory reminds that the job of leaders is to embody *self-differentiation* (self-definition + connection = self-differentiation). Sometimes simplicity is the best and most faithful response—honesty, with humility and compassion, is always appropriate.

When confronted with initial congregational anxiety, an interim pastor may try simply sharing with the transitional congregation that there is a way through the in-between maze. The way through it is known and understood, and they are not alone.

Closing Questions of Discernment Regarding the In-between Time

The in-between time, though anxious for congregations, can also be fertile ground for spiritual growth, community healing, and alignment of a congregation's ministry practice with its missional calling. Listed below are five questions for congregations and especially their Sessions to encourage their prayer and reflection, as well as their dialogue and discernment:

1. What are examples of "interim times" we have already experienced: developmentally, vocationally, relationally, socially, or spiritually? How did intentional recognition of the transitional nature of these times influence what was learned or how we experienced the interim time?

2. What are Biblical examples of God doing amazing work in the lives of faith communities "during an interim"? What are personal examples of God working in you "during an interim"?

3. Where is grace most present (or absent) in the life of an interim congregation?

4. Where is God's sacred presence most evident in the transitions of pastors?

5. Isn't permanence only a myth? How can we ourselves become fully aware of the inherent *blessedness* of the interim journey?

Development Tasks of Interim Ministry:

The Work that *Belongs* to the Congregation

The Foundation: Basic Tasks for the Interim Congregation

The congregation's agenda for an interim ministry period centers on five developmental tasks, as spelled out by Loren Mead in his book *Critical Moment of Ministry: A Change of Pastors*.[3] Though the interim pastor will facilitate this work, it is work that *belongs to the congregation*. The five developmental tasks for the congregation are:

1. Heritage: Coming to Terms with History
2. Mission: Discovering a New Identity
3. Leadership: Shifts of Power/Leadership Changes
4. Connections: Rethinking Denominational Linkages
5. Future: Commitment to New Leadership

Heritage: Coming to Terms with History[4]

It is important for congregations to know their history so that they can appreciate their heritage and be aware of the issues and concerns that need to be resolved in order to move freely into the future. Acknowledging one's heritage influences the second developmental task regarding mission. Missional emphasis that flows from a congregation's history is often (if not usually) the strongest form of ministry performed by a congregation and the most widely embraced.

However, a cautionary note is needed: sometimes a congregation's history includes unhealed wounds, especially wounds created by professional misconduct (e.g. sexual or fiduciary misconduct of pastors, staff or elected officers) or tragedy. Unexamined feelings from unresolved conflict or unaddressed tragedy often (if not usually) present themselves as a destructive force within the congregation, or, at the very least, limit congregational health. History, if not examined, is likely to be repeated.

Mission: Discovering a New Identity

Identity is the task of understanding "who we are now in our present context and what it is we understand God is calling us to be." It is the task of developing the vision of where our great passion, our neighborhoods' great needs, and our spiritual giftedness intersect: *that place is a congregation's shared vocation.* More will be said about this second developmental task in the chapter below: Mission Studies and Discernment Tools.

Leadership: Shifts of Power/Leadership Changes

In most congregations, over a period of time, the leadership begins to take on much of the style and values of the previous pastor. When that pastor leaves, there is often a time when persons who have been in leadership rethink their commitment and determine whether or not they want to continue in leadership positions. Other persons often find the interim time an opportunity to accept leadership roles. This is an opportune time to review staffing, empower those who are on the sidelines, and welcome leadership gifts from all parts of the congregation. The interim period creates an ebb and flow of leadership changes among both staff members and among congregants; such change is natural, ordinary and, to some extent, inevitable and should be expected rather than discouraged or a cause for anxiety.

In addition, to these ordinary ebb and flow changes, the interim period may present the moment for church leadership to address the so-called "elephant in the room": Are there paid or unpaid staff not doing their job or performing their job in a way that does not conform to the church's stated vision, values and goals? If so, the interim period is an excellent time to talk about the elephant.

Connections: Rethinking Denominational Linkages

Congregations often are not aware of the support and resources they can and do receive from their middle judicatory and national denominational structures. That relationship is normally more visible while denominational folk are engaged in working with the congregation in moving through the interim period and seeking to find the right pastor to call. The transition time helps raise the awareness of a congregation regarding its denominational heritage, ministries and resources.

In addition to a congregation's own denominational linkages, the interim period also presents an opportunity to examine relationships beyond one's own denomination. Who in one's neighborhood or city is a natural ministry partner with a shared vision and shared values for ministry? Do existing ministry partners still share the same vision and values as when the partnership began? Does a ministry partnership need to be redefined or even ended?

Future: Commitment to New Leadership

When a congregation has developed a shared vision of its future and has sought to call a pastor to help lead it in moving into that future, there will probably be a new commitment both to that new leader and to that new future. What is the church's vision for itself moving forward?

This developmental task frames the work of the interim period as something beyond "just hiring the new pastor." The interim period, if handled well, can help a congregation move from auto-pilot to a more intentional and purposeful vision for ministry. The "hiring of the new pastor," then, becomes an invitation to enter into a shared journey toward renewed faithfulness.

Thinking about the Developmental Tasks: Are they all necessary?

Previous generations of interim pastors were trained to facilitate the congregation's work on all five developmental tasks—each was considered necessary and rigorous attention was required to fulfill each task. However, recent consideration of interim ministry by Norman Bendroth, David Sawyer and others has called into question the assumptions that undergirded previous training on the developmental tasks.[5] A pastoral colleague likens the full implementation of the five developmental tasks to in-depth marriage counseling and notes that, with the average pastorate lasting a mere five years, that's a lot of in-depth counseling! An executive colleague, the Rev. Scott Lumsden, trains pastors to shorten the length of interim work to a more realistic 9 to 12 months. Lumsden says, "Get in. Solve a problem that needs to be solved. And get out." So is it necessary to do all five developmental tasks? It depends.

As with all things in ministry, discernment is helpful. Discernment helps to assess which of the developmental tasks are more needed and less needed. For instance, a congregation may have recently had a "Season of Discernment" that led to a congregational process in which their history was affirmed and missional vision embraced. Does this congregation need a lengthy mission study? Or what about the congregation one of us once served that hosted the presbytery office, most presbytery committee meetings, hosted the presbytery stated meeting annually, and whose Stated Clerk and Executive both attended (and their families were members)—Did that congregation need to rethink their denominational linkages during the interim? Rather than pursue a legalistic path during the interim period, the wise interim pastor will assess what is needed for the congregation.

DISCUSSION, DIALOGUE AND DISCERNMENT

1. Rank the developmental tasks according to your confidence level from "easiest-I got this" (#1) to "most difficult-I'm not so sure" (#5)

2. What perspectives, knowledge, and/or skills do you imagine you might need for those tasks where your confidence is not as robust?

Seven Additional Developmental Tasks of Interim Ministry[6]

Thirty-three interim pastors identified seven agenda items most often dealt with in their interim experiences in addition to the normal developmental tasks of history, relationship to the denomination, leadership issues, establishing a new identity, and commitment to new leadership.

1. *The Necessity to Rebuild the Congregational "Infrastructure"* – Redesign, renew or restore the administrative structures, processes, procedures, and "know how" efficiency of the congregation. Joan Mabon, a Presbyterian interim minister, offered the observation/ theory that there is generally a three-year period of neglect to the infrastructure by the exiting pastor: one year of trauma or feeling of rejection, one year of struggle with a decision to stay or go, and one year of attention given to the search for a new position. With those concerns preoccupying the pastor there is unintentional but certain neglect of the administrative functions of the pastor. This seems like a reasonable theory—but of course we have no hard data to substantiate it; perhaps we will sometime soon.

2. *Evaluation of and Removal of Staff Members if Necessary* – Congregations seem to be more willing to deal with this difficult issue with the Interim Pastor's leadership than with an installed pastor. The Interim Pastor will not have to live with consequences, and the new pastor won't have to "hassle with" that problem in the start-up months of a new ministry.

3. *Financial/Stewardship Issues* – Often giving is down when a pastor leaves due to disillusionment, unrest, conflict, or disappointment around the pastor who has just terminated. Basic stewardship education and fresh efforts to secure financial commitment to the church can often be more readily received from interim ministerial leadership.

4. *Conflicts of Issues or Congregational Agenda* – An Interim Pastor can usually be more objective and have less personal vested interest in the outcome of such conflict and be more able to help facilitate some decision-making processes. It is a desirable goal that such conflict is resolved prior to the calling of the new pastor.

5. *Interpersonal or Intergroup Conflicts* – Again, an Interim Pastor may be able to serve as an objective third party mediator since he/she will not be concerned about long-term relationships with the individuals or groups who are in conflict. The principals involved can more readily focus on the issue rather than the question of "is the pastor on my/our side."

6. *Getting Closure with the Previous Pastor* – Formal farewell is one thing. Weaning a congregation from the previous pastor is another. The Interim Pastor can help congregations understand this issue since he/she is not the future clergyperson with whom lack of closure is apt to be a lingering problem.

7. *Communication Improvement* – Among other things often neglected as a pastor begins to "look elsewhere" are the communication channels with the congregation. A natural interest and concern held by most members during the interim period makes this a prime time to enhance communications processes.

Discussion, Dialogue and Discernment

1. Rank the seven additional developmental tasks according to your confidence level from "easiest-I got this" (#1) to "most difficult-I'm not so sure" (#7)

2. Choose one task to discuss—the task you find intriguing. What does this task most often look like in a congregation?

3. What perspectives, knowledge, and/or skills do you imagine you might need for those tasks where your confidence is not as robust?

The Journey of Transition

One way to reflect on the above tasks is to get clear about pastoral responsibilities versus congregational responsibilities: what *belongs* to each and what is required to support an effective outcome of the interim journey? It is helpful to acknowledge and gain clarity that pastors have one work and congregations have a different work. The interim pastor's work is one of facilitation while the congregation's work is to claim their responsibility, accountability, and authority to define ministry and mission in ways that are healthy, faithful responses to God's call upon them.

The responsibilities of pastor and congregation are expressed in the figure below.

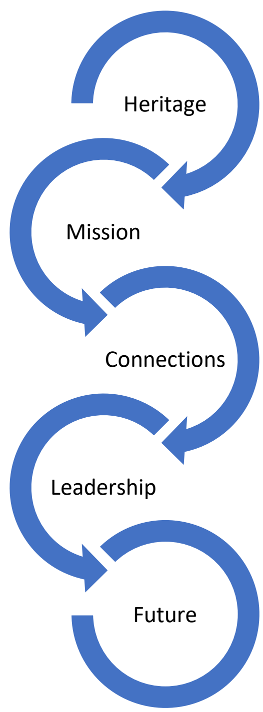
Transitional Leader

Coaching

Assessing

Providing Tools

Models



Congregation

Reflection

Searching

Planning

Deciding to Act

Be able to say, "Goodbye" **FIELD OF WORK** **Be able to Say, "Hello"**

Process Tasks for Interim Ministry:

The Work that *Belongs* to the Interim Pastor

Process Tasks for the Interim Pastor

The interim pastor will facilitate the work described above as the five developmental tasks of the congregation. To accomplish this work, the interim minister will be aided by five process tasks that "belong" to the interim pastor—this is their work to do. Loren Mead described the five process tasks of the interim pastor,[7] to which we have added a sixth process task and have put it first.

1. *Don't suck!* – Be a good pastor. Bring energy, passion and insight into the pulpit. Provide appropriate pastoral care. Remember you will be their pastor for one to two years during a time when the congregation will wrestle with a change in style and perspective, so the bar for technical excellence is set higher for interims. Before you are an "interim / transitional" leader you are a "Minister of Word and Sacrament."

The five process tasks listed by Mead and others in the interim ministry literature are:

2. Joining the system
3. Analyzing the organization as a system
4. Connecting with the denomination
5. Focusing leadership to assume responsibility
6. Exiting and evaluating

Joining the system

It is necessary for the interim minister not just to show up and hold office hours but become part of the congregational family. Such connection requires a balance between communicating one's own values and expressing one's style (or functioning) for ministry versus adjusting to the values, styles and ways the congregation functions. This balance can be described as being oneself yet not too different or as fitting in while not losing oneself.

For example, every congregation has an order of worship, a customary Session agenda, an office rhythm, and calendar of events to which they have grown accustomed. It is expected *both* that an interim minister will have their own way of leading these ministries *and* that the interim minister will be respectful to conform their ways to accommodate congregational practices—at least initially. There may be a time and just cause to make a change (c.f. below: Stages of an Interim Pastorate #2) but the initial entry into the congregation is not the time in most circumstances when ordinary congregational life presents itself. (The interim pastor will make an exception to this rule of thumb when extraordinary circumstances such as serious misconduct, abuse and/or illegalities have existed or are still occurring.)

As another example of seeking the balance between being oneself and adjusting to the congregation, the interim minister will *both* preach and teach according to the conscience as the Spirit leads them (for God alone is Lord of the conscience) *and* appreciate that mainline denominational congregations tend to be "Big Tents" (and faithful, intelligent Christians will sometimes disagree). The interim minister, therefore, will show forbearance and respect to the saints to whom she or he is called to shepherd; never knowingly seeking to create explosive controversy unless one is convinced that Gospel values require such theological, ethical, or prophetic confrontation.

Finally, "joining the system" also (and at the very least) means getting to know the names and stories of members and staff, as well as such idiosyncrasies of schedule and custom that are necessary to function day to day in the *particular and perhaps peculiar* congregation to which one has been called to serve. The interim minister will have joined the system when she or he is able both to appreciate and articulate, in at least a preliminary way, the uniqueness and giftedness of the way the congregation seeks to live into its calling as the Body of Christ.

Analyzing the organization as a system

Once the interim minister has "joined the system," the work of the interim pastor deepens in analysis and widens in perspective to observe, inquire about, and analyze the congregation as an organizational system: How do things work? What works well? What functions poorly? Who are the designated leaders? Who are the actual leaders? How do decisions get made? What are the underlying and expressed anxieties that drive the congregation?

For the purposes of this interim ministry training manual, which is directed toward mainline pastors and congregations, there are three systemic perspectives recommended: (1) "Forensic," (2) Family Systems Theory and (3) The Church Life-Cycle.

1. By forensic we mean the interim minister needs to be something of a detective or researcher. Here are two tried and true methods to play detective/researcher:

   A. *Found Documents* (e.g. Session and Diaconate minutes and congregational annual reports). Reading three years of minutes and annual reports in the initial weeks of one's interim pastorate and then expanding outward toward five and ten years of minutes will give an adequate snapshot of congregational life. In addition to at least this amount of minimum research, reading all documents related to a nodal event in the life of the congregation (e.g. a past schism, misconduct by a pastor, other staff, or elected officer; or events surrounding a tragedy) is necessary. What happened and who was involved in a nodal event is as important to understand as how the congregation as a system responded.

   B. *Interviews,* formal and informal, that seek to hear the "kitchen stories." A kitchen story can be thought of as the deep background to a nodal event. Kitchen stories contrast with living room stories—the metaphor conveys the polite conversation one has with a guest in the living room versus the conversations one has with friends with whom the relationship is close enough they help you in the kitchen. Seek the kitchen stories.

2. Family Systems Theory was developed by Dr. Murray Bowen and expanded upon by Rabbi Edwin Friedmann and the Rev. Peter Steinke and others: see the bibliography for further study. Application of Family Systems Theory allows the interim pastor the means to be "in the system but not of the system," to see below the surface of actions to possible motivations and to understand the underlying concerns that are driving congregational decision-making (Appendix A: Overview of Family Systems Theory). For those with only a cursory understanding of Family Systems, here is a list of 20 questions that can be asked to assist in a family systems review of the congregation:

1. If you were to draw your congregation as an intricate web of relational connections, what would it look like?
2. Does the congregational anxiety trend toward being acute (situational) or chronic (perpetual and ongoing)?
3. What is the congregation's reactive, default, emotional response to a change?
4. Who "carries" the congregational anxiety most publicly?
5. Does chronic anxiety in the congregation tend to get expressed as distance or togetherness?
6. Who, specifically, tends to "cut-off" and who tends to "fuse with others"?
7. What do notice happening to relationships when conflict erupts?
8. How comfortable is your congregation talking about things when conflict is present?
9. Who in the congregation, specifically, tends to blame others versus looks at their own role?
10. Who is speaking for themselves alone versus who is speaking for others?
11. Who is using "I-Language" versus who is using "You-Language"?
12. How often do people take positions by communicating their principles or core values?
13. Where are the triangles?
14. Where (and how) are you being invited to take sides?
15. Where (and how) are you being invited to over-function or under-function?
16. Where (and how) are you being invited to agree with someone regardless of what you think about a subject?
17. Who maintains clear relational boundaries? What does that look like?
18. Who respects the boundaries of their role(s) and responsibilities? What does that look like?
19. What are you doing to manage yourself—especially your anxiety?
20. What helps you notice and be intentional about your tone and your posture when you speak?

Coaching Pointers from Bowen 8 Concepts

In addition to the above list of questions, the coaching pointers below are taken from Roberta Gilbert's review of Bowen's eight concepts.[8] These coaching pointers serve as a reminder / refresher course on the basics of family system's leadership:

A. Concept #1 (Emotional family system—anxiety expressed as togetherness or individuality):
    a. Notice and interrupt the unhealthy patterns within the system.

B. Concept #2 (Self-differentiation):
    a. Seek self-definition with connection in relationships.

C. Concept #3 (Triangles):
    a. Stay calm
    b. Stay connected to both sides of the triangle
    c. Put the two, other sides of the triangle together
    d. Best work is to help leaders stay calm, clear and connected

D. Concept #4 (Cut-off):
    a. Stay connected with one's parents, children, colleagues, employees, etc.

E. Concept #5 (Family projection process—how anxiety gets transmitted):
    a. Don't over-focus
    b. Don't over-function
    c. Don't react
    d. Keep calm, calm, calm!

F. Concept #6 (Multi-generation transmission process—aka, "generation to generation"):
   a. Get the factual history of a family or organization
   b. Pay close attention to nodal points and watershed events
   c. Play the role of a researcher, "I wonder…"

G. Concept #7 (Sibling Position and its influence):
   a. Be aware of your own sibling position
   b. Become aware of how your sibling position interacts with others

H. Concept #8 (Societal regression):
   a. Calm one's emotions – learn the facts, focus on facts.
   b. Start to think systems.
   c. Step out of patterned positions.
   d. Take positions based on principle.

3. The church life-cycle is recommended because this training manual will be used by mainline pastors serving mainline congregations. Most mainline congregations need some form of renewal and the church life-cycle helps the interim pastor better assess the life-death-renewal curve of a congregation (Appendix B: The Church Life-Cycle). Further, because many mainline congregations are in the fourth quarter of their life-cycle (the "Dying Church"), it is helpful for the interim pastor to be aware of ecclesiastical options for such congregations as a means of aiding one's organizational analysis. (Appendix C: Future Options for Congregations). However, it must be emphasized the interim pastor is never empowered within mainline polity to instigate the ecclesiastical options listed in Appendix C. Rather, all actions deemed potentially appropriate are to be engaged as a dialogue between congregational and judicatory leadership.

Connecting with the denomination

This work differs from the congregation's developmental task of reconnecting to their denominational ties. Connecting with the denomination as work that *belongs to the interim pastor* is about discovering the eco-system that may or may not exist within a given area. What are the expectations of the Commission on Ministry? Has COM assigned a liaison to the congregation? What role does the presbytery executive or Stated Clerk play in supporting the congregation, the interim pastor, and the congregation's interim work?

Focusing leadership to assume responsibility

The fourth process task is connected to the work done in the second process task. That is, what the interim pastor discovers in their analysis of the organization as a system (2nd process task) gets expressed through focusing leadership to assume responsibility (4th process task). The interim pastor focuses, or more appropriately refocuses, leadership to help elders, deacons and congregants understand the ministry and assume responsibility for its faithful implementation. There are two, key aspects to the work of focusing leadership.

First, the interim pastor will help congregational leaders understand the responsibility for each aspect of congregational life and become accountable to one another for that work. Among the questions to ask are such things as, "What are Session's responsibilities? What does each committee do? Who has authority to make decisions for a particular aspect of ministry? Is there clarity and consensus about what a committee is supposed to do, how it functions, and who is responsible and to whom committee members are accountable?" In other words, the interim pastor will ensure accountability to the 5 R's: the right people are doing the right thing in the right way at the right time for the right reason.

A common example of focusing leadership to assume responsibility occurs when a long tenured pastor leaves. It is often the case the Session has delegated much responsibility and many decisions to the pastor. Even if the pastor has resisted the temptation to abuse the additional authority granted to them and avoid becoming an autocrat, Session and the committees are diminished. In Family Systems terms, the pastor's over-functioning necessarily will create a tendency for others to under-function. Focusing leadership and assuming responsibility in this situation will involve defining, clarifying and communicating agreement regarding the boundaries for the pastor, the Session and the committees.

Second, the interim period is often a time when some leaders retire and others seek to step forward into service. Such leadership transitions may occur for a variety of reasons. The love of the former pastor, dislike of the former pastor, or the fresh start of the interim period may motivate resignations as well as a desire to serve. The interim pastor will help facilitate the process of invitation, on-boarding, and holding accountable these volunteers to the work set before them. While some pastors are hesitant to hold volunteers accountable, the authors distinguish between "paid staff" and "unpaid staff." The elders are responsible for the ministry of the congregation, including both paid and unpaid staff. The interim pastor can and should encourage and facilitate accountability from all who serve.

Exiting and evaluating

The placement of this 5th process task is a bit misleading. Obviously, the last thing the interim pastor will do is exit the job and the congregation. Such exits should be done well: with relational integrity and professionalism. Say what needs to be said, all of what needs to be said, and to whom it needs to be said. Do not leave messages unspoken that will inhibit a healthy launch of the next pastor's ministry. As well, the interim pastor should leave the next pastor a written, confidential report regarding their analysis of the organization as a system: the joys and concerns, the opportunities and challenges. Be kind, respectful and honest. Focus on the congregation as a system without identifying individuals by name unless someone presents a potential threat of harm. (If required by denominational polity, this report may be sent to the committee or commission overseeing the congregation.)

That exiting and evaluating is the 5th process task listed is misleading in that the work of evaluating does not begin at the end but is something that occurs throughout the interim period. In this sense, the 5th process task also links to the 2nd process task of analysis of the organization. While a written report to the denomination is rarely requested, it is appropriate for the interim pastor to be sharing with the Session and the congregation their insights, as they are gleaned throughout the interim period. However, great care should be given in the form and tone of all such evaluative remarks.

The model of Jane Goodall is helpful. Dr. Goodall spent her life observing primates and writing down her observations. In a similar manner, an interim pastor may share what they notice and observe. An inquisitive and curious tone is needed so that observations are not perceived as judgmental. It is therefore helpful to make "I notice that…" and "I wonder about…" statements. The goal for communicating one's provisional evaluations is to help the congregation begin to notice, observe and wonder about their own functioning: "Are we healthy (or not)? What do we do well and what do we do poorly? Are there obstacles we ourselves are creating, and, if so, how might we remove these obstacles to do ministry in more faithful way?" The ongoing work of communicating one's leadership and congregational evaluation is a tool for the interim uses to facilitate awareness and accountability.

DISCUSSION, DIALOGUE AND DISCERNMENT

1. Rank the process tasks according to your confidence level from "easiest-I got this" (#1) to "most difficult-I'm not so sure" (#5)

2. Choose one task to discuss—the task you suspect will be most challenging. What does this task most often look like in a congregation?

3. What perspectives, knowledge, and/or skills do you imagine you might need for those tasks where your confidence is not as robust?

Stages of an Interim Pastorate

Interim pastorates tend to follow a similar path from task to task but vary a great deal in how quickly or slowly each task is accomplished. Here are the typical stages of an interim pastorate and the broad range of time each task requires to be accomplished well:

1. Pre-Entry: the negotiation and hiring period (3 days to 4 weeks)

2. Getting to know your congregation: bonding, connecting, being curious. (3 to 6 months)

3. Body of work I: evaluating and engaging your congregation: what needs work? (3 to 12 months)

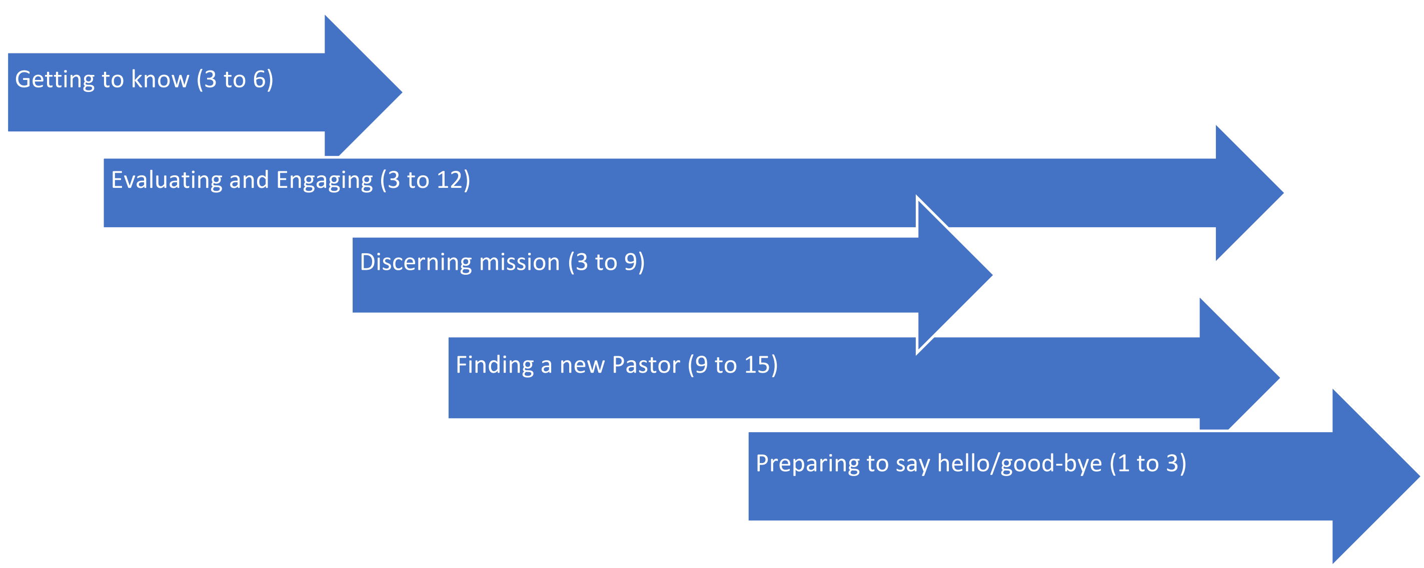
4. Body of work II: helping your congregation discern its mission: producing the "mission study." (3 to 9 months)

5. Helping your congregation find its new pastor: the work of the Pastor Nominating Committee. (9 to 15 months)

6. Preparing your congregation to say good-bye and hello with gratitude and grace. (1to 3 months)

These five stages that occur once the interim pastor is "in the field" are generally sequential but not entirely. That is, it is not entirely necessary that one stage must be complete before the next begins. Rather there can be significant overlap between when one stage begins and ends and the beginning of the next stage.

The way engineers think about project management timelines is a helpful analogy. Engineers seek to develop a project, so each stage builds upon the previous stage's work. They use software to mark when each portion of a project begins and ends and note places of overlap. Assuming an 18 to 24-month interim pastorate, a typical timeline might look something like this (numbers indicate months required for the task):



As you can see from the graph above, there is a general sequence, but it is imprecise, with plenty of overlap between the end of one stage and the beginning of the next. What is important is for the transitional / interim pastor to understand the purposes for each stage and how the different stages flow together, to which we will address ourselves next.

Getting to know your congregation: bonding, connecting, being curious

The purpose of the getting to know your congregation is just that: GET TO KNOW YOUR CONGREGATION! There is a long-standing pastoral debate between those who argue pastors have "five, smooth stones" or "five golden coins" to spend during the honeymoon phases of one's ministry versus those who argue a pastor should not make any changes for at least one year. For the transitional / interim minister both of these arguments are extreme. It is a truth that the interim pastor must get to know the people, the system, the written policies and the unwritten practices, as well as the heart of the congregation before the church membership will welcome and receive change. It is also a truth that the interim pastor does not have as much time as an installed pastor to build the relational capital required to lead effectively. Therefore, the interim pastor must work quickly to bond, to connect, to be curious with intent and by design, yet not go so quickly that trust is not given sufficient time to develop.

Evaluating and engaging your congregation: what needs work?

Every church has issues. Every church also has strengths. The interim pastor's job is to work with the Session, deacons, paid and unpaid staff to discern what are the issues that need some help versus what should be left alone. One way to begin to discern the distinctions between what needs help (and how much help) versus what should be left alone is to use a stoplight criterion:

RED = It is broke and needs fixing. The system is unhealthy, relationships are toxic, something illegal is happening, something immoral is routine. If not addressed, the issue will continue to damage the congregation's life and mission.

YELLOW = The issue isn't broken but needs realignment. This is for issues where something is distorted or misaligned. Staff try hard but don't have proper job descriptions, the budget is out of balance, or mission focus is too diffuse.

GREEN = The church is quirky, maybe even a little goofy, but essentially healthy. Every church will have its unique personality. If a quirk absolutely has to be normed to align with denominational polity, do it. Otherwise, let it be.

The intent of using a stoplight criterion is to set a church's uniqueness in a broader context and thereby allow the interim pastor to have greater perspective. It is simply not true that an interim pastor needs to address every issue she or he finds in a church. Discernment with the Session is necessary. Wisdom and judgment are helpful. What *needs* to happen? What *would do well* to happen? What *could* happen? And what can be *left alone*?

A second question that arises during this second phase is where to look. Even the smallest church is a complex system with multiple moving parts, so where should an interim pastor focus her or his attention? Using a 360-degree pinwheel can prove helpful in providing proper focus.

Governance: Does the church know its polity and function accordingly?

Staffing: Are the paid and unpaid staff the right people, doing the right things, with proper oversight and guidance?

Mission: Does the church know and live its calling from God?

Program: Are there any obvious gaps to correct?

Fiscal: Is the budget balanced? Are staff adequately compensated? (See Appendix D: Financial Best Practices and Appendix E: Guidelines for a Financial Review.)

Physical: Is the church plant functional? How does it look?

Administrative: Does the church have appropriate policies and procedures, including a personnel policy, that are known and used? When was the last time they were reviewed? (See Appendix F: HR Best Practices.)

Helping your congregation discern its mission: producing the mission study

To paraphrase Frederick Buechner, "Vocation is the place where our great passion (or joy) meets the world's great need."[9] We would add a third intersection point toward defining vocation: our spiritual giftedness. What do we love? What do our neighbors need the Church to be and do? What are we good at?

The mission study is intended to help a congregation bring to shared awareness, with clarity, their vocational purpose as a church. Who are we (now)? Who are our neighbors (now)? To what is God calling us (now)? The production of the mission study is ordinarily guided by the interim pastor, with support from the elders, and the participation of the congregation. Each judicatory (mid-council) will have their own rules for what is required to be present in a mission study, what permission is required to approve it (if any), and other guidelines and requirements. Check with your Commission on Ministry liaison or the denominational equivalent.

Helping your congregation find its new pastor: the work of the PNC

Ordinarily the interim pastor's only role in the work of the Pastor Nominating Committee (PNC) is to serve as the moderator at the congregational meeting where the members of the PNC are elected. Otherwise, the interim pastor does not have a role in the PNC. Some mid-councils allow the interim pastor to answer questions and guide the process on procedural questions, though we know of no mid-councils that allow for interims to share input on substantive, content decisions. That is, an interim may help answer a question about proper denominational protocol from an anxious PNC chairperson but is not to share her or his opinion about what should be said in the Ministry Information Form. Check with your Commission on Ministry liaison or its denominational equivalent.

Preparing your congregation to say good-bye and hello with gratitude and grace

A healthy hello depends upon a healthy good-bye. The interim pastor has the opportunity to model what it looks like to say good-bye: to express appreciation for the congregation's welcome and work, to speak directly and personally to those with whom the interim pastor has drawn close, to communicate appropriate post-interim boundaries that are required by the mid-council's "Covenant of Closure," and to celebrate both the hard work of reflection and discernment of the previous months as well as the excitement and anticipation of what is to come with the congregation's new pastor. By saying good-bye well, the interim pastor prepares the congregation to say hello to their new pastor.

It is appropriate for the interim pastor to guide the PNC, the Session, and the congregation in their planning and preparations for a healthy hello to their new pastor. Logistical considerations for a leadership transition should be discussed with Session and staff, such as what information needs to be shared, in what form, and by whom. Helping to guide the welcome celebrations is also appropriate, (though the interim should show a light touch in such conversations), especially as you share your personal perspective about what you have found more helpful and less helpful in similar situations.

The Pre-Entry Phase: Appropriate Goals for the Interim Period[10]

Readers may have noticed the Brief Overview above listed six stages of the interim pastorate yet, so far, we have only discussed five of them—the five related to the time when the interim pastor is "boots on the ground" with the congregation. However, there is a prior stage that is also important: discussing and determining with congregational leadership what they want to happen within their life together as a faith community. Astute readers may have wondered, "Why would it take up to four weeks to negotiate a call?" The answer is both that churches tend to move at a glacial pace and that *discussion is necessary to discern what leadership wants to happen*—what are their goals for the congregation the interim pastor will help facilitate, encourage, and support their fulfillment?

Listed below are eight common goals that can be presented to congregational leadership during the negotiating period before accepting the call to be the church's interim pastor. There are other possible goals, of course, but these eight are common throughout churches:

1. *To Maintain the Viability of the Church* – The ongoing vital programming expected of a lively congregation consists of pastoral duties plus the Christian activities of the laity. Continuing the needed programs already underway and making efforts to help make them more meaningful are the responsibility of an interim leader.

2. *To Resolve Feelings of Grief* – Pastoral visitation and group meetings involving personal, direct contact with individuals, and intentional expression of interest in their feelings, more often than not will provide healing catharsis.

3. *To Reinforce the Ministry of the Laity* – Encouragement of participation and leadership by lay persons is vital. The interim period is a particularly good time to develop lay leadership. A member of the laity may accompany the pastor when home communion is administered. Many responsibilities in the church may be carried out by lay persons rather than a pastor.

4. *To Clarify the Mission of the Church* – Congregations need to be reminded that Christians are here to serve, not only to be served. The interim may be the voice of the larger Christian community at a time when the church is turned inward to its own needs. The minister teaches by example, by preaching, and by formal training.

5. *To Deal with Special Needs of the Church* – Every church is different. As a result of diagnosis, the interim will learn of specific problems in the congregation. Through knowledge of techniques in conflict management and tactful suggestions by the "outsider" (the disinterested person, the interim minister), beneficial changes may be affected.

6. *To Emphasize Fellowship and Reconciliation* – Opportunities for encouraging Christian fellowship are many. For example, arranging for a coffee hour before or after worship service is helpful. The incorporation of "congregational concerns" during a worship service can be a time of real sharing.

7. *To Strengthen Denominational Ties* – The interim minister personally maintains a good relationship with the denomination and encourages the local church to participate in denomination-wide activities and programs.

8. *To Increase the Potential for a Successful Ministry by the Next Regular Pastor* – The interim minister is future-oriented. The interim minister is concerned with the coming of a new pastor and is helping to prepare the congregation for the arrival. In addition, he or she communicates to the new pastor information that might be helpful.

Discussion, Dialogue and Discernment

1. Rank the eight additional developmental tasks in order of your personal comfort zone, from most comfortable (#1) to least comfortable (#8):
    a. Where do you imagine you will want to focus your attention most and least?
    b. Where do you imagine you will need to focus your attention most and least?

2. Brainstorm additional examples of inappropriate interim goals that are either too narrow, too global, or misaligned with the nature of interim work.

Inappropriate Goals for the Interim Minister (and an explanation why)

In addition to the above listed appropriate goals, congregational leadership sometimes suggests what can be described (charitably) as inappropriate goals. Because even seasoned church leaders are not always clear on precisely how pastors spend their time, leaders may suggest goals that are either too narrow or too global in perspective. Here are three such examples of inappropriate goals:

1. *Grow the church* – this goal depends on too many factors outside of the control of the interim pastor, including the demographics of the congregation, neighborhood, willingness of members to invite others, etc. Sessions should avoid listing their "hopes and dreams" for the congregation as an expectation for the interim pastor (this includes the perennial church request to "attract young families").

2. *Cultivate a culture of…* – this goal is too global. Whether a congregation desires a culture of evangelism, a missional culture, a culture of tithing, or some other kind of culture, it is important to remember that a Session can change a program overnight but "church culture" changes over time. Be realistic about what can occur in a congregation over an 18 to 24-month time frame.

3. *Have scheduled office hours* – this goal is too specific and should be an ordinary expectation of professional ministry. Other examples of too specific are "preach sermons" and "visit the sick." These actions are more appropriate for inclusion in the job description but are not helpful if included in the Interim Search Document as expectations of what a Session hopes the interim pastor will accomplish in, with, through, and for the congregation.

Negotiating the Transitional / Interim Contract

A sample contract can be found in Appendix G. Key issues in negotiating a transitional / interim contract include,

1. Specify the developmental tasks the congregation wants to see addressed, especially note developmental tasks from the list of "Eight Additional Developmental Tasks."

2. Specify the goals the Session wants to see accomplished. Be clear with the Session about the distinction between appropriate and inappropriate goals.

3. Require that a job description accompany the contract.

4. All contracts should conform to mid-council / judicatory requirements. Often a transitional / interim contract will specify the interim pastor cannot become the next installed pastor. Because exceptions to this common practice exist, clarity of communication is necessary!

5. Specify the length of the "Interim Tail," the length of time you will be paid after the church has found a pastor and/or no longer needs your services. *Ordinarily* the length of this term is either 30, 60 or 90 days. The recommendation is for the interim tail to be at least 60 days in order to give you an opportunity to find a new position. The justification for having an interim tail written into the contract is that it gives you an opportunity to devote yourself to the work of transitional / interim ministry without need for (too much) worrying about providing for you and/or your family. Under no circumstances should you sign a contract without a specified length of time you will be paid upon notice that your contract is ending.

Transition Ethics

1. Negotiate the interim contract in an ethical manner and honor its terms.

2. Honor church constitutions, by-laws, and manuals of operation.

3. Maintain appropriate boundaries and pastoral role throughout the transitional / interim period.

4. Maintain appropriate relationships with both your predecessor and your successor.

5. Avoid a premature departure.

6. Seek to exit with an appropriate farewell.

Interim Scenarios for Discussion and Dialogue

Having reviewed the developmental tasks of the interim congregation, the process tasks for the interim pastor, the stages of an interim, as well as appropriate and inappropriate goals, let's take a moment to imagine several scenarios an interim pastor may encounter. In groups of three or four, choose a scenario to discuss. For each scenario,

1. define the potential issues and/or challenges, and

2. describe the approach you would take to address the issues or challenges.

- **Grace Church** is a suburban congregation of 320 members. Their pastor of 12 years who left to take another call had been both popular and respected. Over the years, Session and the congregation had begun to trust his decision-making and delegated most decisions to staff. The pastor often consulted the congregation through focus groups for big decisions that would have significant impact. Although there was a semi-functioning committee structure, staff and committee job descriptions had not been reviewed in over a decade. Three years before leaving, the congregation had approved the Session membership to move from 24 to 9 persons.

- **Covenant Church** is a rural congregation of 75 members. Their previous three pastorates had lasted 23 months, 37 months, and 29 months. A review of Session members indicated that over the previous decade, 85% of elders came from five families consisting of 15% of the membership. What little mid-week programming at the church was designed, organized and announced by the Monday morning "newsletter committee." The community was growing due to an extension of a major highway from a larger urban center into the county, growth that was reflected in the congregation but was causing conflict.

- **First Church** is a struggling congregation of 60 members in a large, urban center. The neighborhood in which they are located has transitioned from majority Anglo to a primarily Hispanic neighborhood. Most members travel 20 to 30 minutes and pass several churches to get to First Church. First Church's former pastor had been there 28 years. After a good first decade in which church membership peaked at 150, the church has been in membership decline. First Church's mission supports a local food bank and giving to the presbytery. They like each other and consider themselves a friendly church.

- **Faith Church** had been a congregation of 200 members as recently as the year before but had recently experienced a schism when its pastor of 7 years decided it was time for Faith Church to adopt the denomination's "Matthew 25 Project." The Session was divided about becoming a part of the project because it sounded "too political" and "we're a purple congregation." The pastor would not be dissuaded and began, as he put it to COM, "to preach and lead in the direction of God's will." The pastor left Faith Church after being its pastor for 10 years. It had 120 members.

Common Tools for Interim Ministry

Listed below are tools commonly used in interim ministry: the journey wall, a neighborhood walk (also called an exegetical walk) or its variation, prayer walking, a MissionInsite database report, and an appreciative inquiry exercise. Familiarity with each of these tools will be helpful to the interim pastor, who should find their own comfort in their use. (That is, feel free to adapt them to your own style and according to the needs of the congregation.) These tools are each helpful toward the congregation discerning its mission and vision and may assist in writing the mission study, which is the subject of the next section.

Journey Wall

A Journey Wall creates a timeline in the fellowship hall using butcher paper. For transitional purposes, a Journey Wall can help a congregation look back (at their identity) to look forward (to where God might be leading). At a fellowship event (or series of events), ask congregants to share their stories:

- The approximate time (by decade or year) when they *personally* experienced God's love and grace through a church. (This can be at the same or a different church.)

- The approximate time (by decade or year) when the church *as a faith community* experienced spiritual insight, deepening, challenge, or blessing. (This is, of necessity, an exercise that will be dominated by longer-term members and will help others to hear the congregational story of God's love and grace through the decades.)

- In small groups, have congregants discuss:
    - What *themes* emerge from the narrative told in this journey wall?
    - What *core values* emerge?
    - What *chapters* are written by this narrative? How do the chapters differ from one another?

- Have each small group share their answers with the whole gathering. Discuss the questions above as a large group.

Neighborhood Walk (also called: Exegetical Walk)

The word *Exegesis* literally means a *critical interpretation* and is commonly applied to the study of literature. As readers of the Bible, we exegete the text with a view to discerning its truth for our lives. In this exercise, you're invited to undertake an exegesis—a critical interpretation—of your neighborhood. Through careful, sensitive, and critical observation, your task is to discern the truth of God's presence where you live. Quite simply, it's about reading your neighborhood as one of the primary texts of daily life—one through which God speaks.

To do this properly, you need to set aside two hours of uninterrupted time. Before you head out, think about how you define your neighborhood and how it's physically laid out. Draw yourself a map, including your own home, basic street patterns, and any landmarks, commercial or community buildings, schools, or parks. Be sure to include those boundary markers or natural borders that give your neighborhood definition. For some, the neighborhood will be larger than for others. It's a very personal thing; no one else can define it for you. The only criteria are that it includes where you live and is walkable. Once you've got a rough idea in mind of what area to include, grab a notebook and pen and head off.

Be sure to include time along the way to stop, buy a drink somewhere, sit in a park or at a bus stop, and linger outside public buildings or places of interest. There's no hurry. Here's a list of question to help you as you go:

1. As you stand just outside your house or apartment—by the front gate or on the footpath—what do you see as you look in each direction? What do you hear or sense? What activities do you notice?

2. As you walk the neighborhood, what do you notice about the architecture of the houses or apartment complexes? On average, how old do you think the houses or apartments are in the area? How much renovation or rebuilding is going on?

3. What do you notice about the front gardens or entrance ways to each of the houses or apartments? Does your neighborhood feel like a cared-for place?

4. How many houses or apartments for sale do you see? What indicators of transience do you observe? Does the neighborhood have a feeling of permanence or change?

5. Is there a freeway or major highway close by? If so, try to imagine this area before it existed. Who has gained or lost by its introduction?

6. Stop—sit if you can—in a tree-lined street or quieter spot, then at a busy intersection. What are the smells and sounds of the neighborhood? How quiet or noisy is it?

7. How many community or civic buildings do you see? What are their purposes? Do they look inviting, well-used, deserted?

8. What public spaces are provided for children, teenagers, or adults? Are they being used? If so, in what ways?

9. If there is a local park, what do you notice about it? Does it fell like a welcoming or inhibiting place? Who is there? How is it used?

10. Do you pass churches or religious buildings? What does their design or appearance communicate to you?

11. What kinds of commercial buildings are there? Walk around a supermarket or local store and identify who makes up the clientele.

12. If your neighborhood includes a shopping area, is there provision made for people to sit, relax, or relate?

13. Excluding the areas of business, how many people did you pass while walking? What age, race, and gender are they? How pedestrian-friendly is the neighborhood?
14. Imagine yourself as an old, infirm person with no car, or as a young child, living in the middle of this neighborhood. How disadvantaged or advantaged would you be with respect to shops, churches, parks, or schools?

15. What evidence is there of public transport? Who uses it?

16. Are there places in your neighborhood that you wouldn't go?

17. Where are the places of life, hope, beauty, or community in this neighborhood?

18. What evidence of struggle, despair, neglect, and alienation do you see?

19. What sense of connection do you feel to your neighborhood as you walk through it?

20. In what ways do you sense God's presence where you live

Prayer-Walking Guide[11]

A variation on the Neighborhood Walk is called "prayer walking." What is prayer-walking? One simple definition is: Praying on-site with insight. The purpose of prayer-walking is to seek God's blessing, mercy, and transforming power, for the community and ourselves, and to become more aware of what we see by connecting prayer-walking with structured observation.

General Guidelines for Prayer-Walking

- Meet at an assigned time and start with group prayer.

- Walk in groups of two or three. Plan routes ahead of time to cover as much of the designated area as possible.

- Pray aloud in a quiet, conversational voice, if you feel comfortable doing so, or pray silently. Don't call attention to yourselves. As WayMakers puts it, "You can be on the scene without making one."

- If anyone asks what you are doing, be prepared to respond: "We're praying God's blessing on this neighborhood. Is there any way we can pray for you?"

- Although it is not the primary purpose of prayer-walking, be open to opportunities to interact with and bless people.

As you pray God's promises with specific homes or work sites in view, you'll find that hope for those people begins to grow. You'll begin to see people as God might view them. You'll likely find yourself becoming more interested in the welfare of the people you are praying for. Watch for the ways God impresses you to display Christ's love in practical acts of kindness.

- Plan to walk for about half an hour. If anyone in your group is not comfortable with walking, they can prayer-drive around the neighborhood instead.

- Gather to share your prayers, observations, and experiences. What did you learn about the neighborhood? Where was God in this experience?

- Encourage people to continue praying for the community during the week.

How Do You Pray?

- *Pray for discernment*—seek the gift of seeing the community through God's eyes, and to discern what God is already doing among the people. Ask God to reveal what you need to know to inform your prayer for the people, events, and places in the community.

- *Pray for blessing*—for every person, home, and business you encounter; for God's grace in each life; for God's will to be done in this community "as it is in heaven" (Matthew 6:10).

- *Pray with empathy*—see and feel what residents live with. Pray for those things that express brokenness and grieve God's spirit and give thanks to God for the blessings and gifts that exist in the community.

- *Pray from scripture*—prayers based directly on God's word can be especially powerful. You may want to bring a Bible with key passages highlighted or copy verses onto note cards.

- *Pray in God's power*—allow for silence (Romans 8:26), yet be bold, too (John 14:12-14).

MissionInsite Database[12]

MissionInsite is a database tool that culls data from the U.S. Census, the Gallup Poll, Barna Research, Pew Foundation Research, and other sources to paint a picture of your community. The information included in a MissionInsite report includes:

- demographic data,
- lifestyle preferences (e.g. hobbies; how a household accesses the news; use of social media; top concerns in a household, community, or of national interest, etc.), and
- religious preferences (e.g. denominational affiliation, reasons for not participating in a church, reasons why one might stop participating in a church, most attractive programs, etc.).

Churches requesting a MissionInsite report will receive a "snapshot" of the neighborhood surrounding the congregation. The information from these data reports can be used to help congregations define their missional objectives including,

- understand who your neighbors are and where different neighbors live,
- identify the possible connection points between your congregation and your neighborhood, and
- help a Session and congregation make more informed decisions about where to focus ministry.

Search parameters desired for a MissionInsite report include (a) specific zip codes, (b) an *n*-mile radius around the church, (c) an *n*-mile drive from the church, or (d) specific parameters of your choosing.

When the MissionInsite report is completed, then the work begins! The "snapshot" will be a 30-page document flooded with data. It is strongly recommended the report be handed to members of the congregation who love playing with data. Assign a group of 2 – 5 "data junkies" to read, pray over, discuss and discern what they see in the report, and then provide the Session with a one-page summary:

- What are 2–5 possibilities?

- What are 2–5 challenges?
- What are the 2–5 places where the congregation's passion and giftedness overlaps with the neighborhood's concerns and needs?

Now for the fun part: What do *your* pastor, elders, and church members, together, hope and dream? How do *all y'all* hear the Spirit's leading? What, then, shall you do?

Appreciative Inquiry Overview

Appreciative Inquiry seeks to discern a congregation's call through conversations about their history and identity that focus on strengths, blessings, and hopes. *The key to success is high participation in a positive, well-implemented, church-wide event.*

1. **The purpose of an Appreciative Inquiry exercise is to seek the following:**
   a. Find clarity about yourself as a congregation,
   b. Be energized toward your shared future,
   c. Replace a background of confusion and malaise about future prospects with a positive and hopeful outlook that continues into the next phases of transition.

A good process takes the needed time at each step. Solid work will reap commensurate rewards.

2. **Implementation of a Church-Wide Event. Set aside a day and time period and issue explicit invitations.**

Tables: 6–8 people per table. Each table should have the following resources:

- Interview question sheets for each person
- Pens/pencils
- Colored crayons and markers (lots)
- A LARGE newsprint-size "Post-it"

3. ***Interviews:* Use "Memories, Hopes, and Conversations" sheet on the next page.**

Use the following explanatory script:

> In front of you there is a sheet with three questions on it. Break into pairs for mutual interviews. You will take turns responding to each question, while the other listens and takes notes. Each person will have 8 minutes to respond to the first question, so the first question will take 16 minutes.
>
> Take a moment to think about the first question. Decide who will respond first, while the other person listens and takes notes. In 8 minutes, we will let you know it is time to trade roles and let the other person respond while you take notes.
>
> It's time to trade roles. In 8 minutes, I will let you know it is time to move on to the next question.
>
> The next two questions will take 6 minutes for each person—12 minutes per question.

Data Collection: On large sheets of paper posted around the room, have participants write responses to the following:

- What themes emerge from the narrative being told in this appreciative inquiry?
- What core values are emerging?

- What hopes, dreams, and possibilities are emerging?
- What challenges need to be confronted with repentance?

Appreciative Inquiry Worksheet: memories, hopes, and conversations

Interviewee_________________ Interviewer________________________ Date__________

1. Remembering my entire experience at our church, when was I most alive, most motivated and excited about my involvement? What happened? What was my part? How did I feel?
2. What do I value most about our church? What activities or ingredients or ways of life are most important? What are the best features of our church?
3. Building on these experiences and strengths, what are three possibilities I prayerfully imagine God might desire for the future of our church?

Mission Studies and Discernment Tools

The writer Frederick Buechner famously defined God's call and our vocation as "where your deep gladness and the world's deep hunger meet."[13] Unfortunately for most of us, finding the intersection between our deep gladness or passion and the world's deep hunger or need can look something like the figure below on the right.

Moving forward requires discernment: listening together to the guidance, conviction, liberating and so-crazy-it-just-might-work ideas given through the Holy Spirit. Mission studies, when conducted as a season of congregational discernment of God's Holy Spirit, may help a congregation be able to *see* and to *know* and to *trust* God is calling them into a particular form of service that requires a particular kind of pastoral leader.

Although we love Buechner's definition of God's call and our vocation, we want to add a third point of intersection: our spiritual giftedness. It is often said "God doesn't call the gifted but gifts the called," which is true but does not mean God's gifts only come *after* the call. Sometimes God's calling has been at work through many years and much spiritual growth, and finding the intersection of a congregation's gladness and passion, the world's deep hunger and need, and the congregation's spiritual giftedness can look something like the figure below.

Identity and purpose. To whom do we belong and what is our great passion, our joy in ministry? How can we best express God's calling upon us?

Spiritual giftedness. What do we do well/best and what unique resources do we possess with which we can bless our neighborhood?

Our neighbors. What are the physical, social, and spiritual needs of our neighbors?

The interim pastor usually facilitates the mission study, which at its best is a congregation-wide, prayerful, spiritual discernment. Every church has a unique identity, formed in the image of God, and a sense of giftedness, character, personality, and vocation. Helping an entire congregation recognize and trust the Spirit's naming of their identity is a gift the mission study can provide. Every church has a unique calling to impact the world for Christ. The interim pastor's job is to help a congregation name that calling. Using the interim tools discussed in the previous section and the mission study models listed below, will help the interim pastor in this work.

Mission Study Models[14]

Because each church is unique, each church approaches the writing of a mission statement in its own way. Included here are some models and samples that may be helpful. These are not intended to be formulas, but merely suggestions and stimulation for your own ideas. Any of these may work well for a first draft and then be further developed.

BASIC MODEL *Begin writing phrases, sentences, and words which respond to the following:*

- Who have we been? Who are we now? How are we unique as a community of faith?
- How does our setting affect who we are?
- What are we doing now? Why do we do what we do? How do we do what we do?
- Where do we want to go from here? Toward what is God calling us?
- What are our hopes for congregational life and outreach into the community and world?
- How are we going to get there? What processes will we employ? Who will be involved?
- *Develop paragraphs. What themes seem to emerge that might shape the statement?*

MODEL #2 *Respond to these questions. Some questions may require more than one sentence to answer.*

- How are we unique as a community of faith?
- How has God shown special care for us as a community of faith?
- What kind of community of faith do we feel God is calling us to be?
- What do we hope to do in order to fulfill our calling?

MODEL #3 *Complete each sentence with several words, phrases, or sentences.*

- We, the members of _______, are a people:
    - Passionate about…
        - Our passion is reflected in…
    - Whose spiritual gifts as a community are…
        - Our spiritual gifts are reflected in…
    - Surrounded by people and needs that…
        - Our response to these needs is…

- As a unique expression of Christian community, we intend to honor this passion and use these gifts to serve these people and needs by…
    - Living out the first Great End of the Church by…
    - Living out the second Great End of the Church by…
    - Living out the third Great End of the Church by…
    - Living out the fourth Great End of the Church by…
    - Living out the fifth Great End of the Church by…
    - Living out the sixth Great End of the Church by….

MODEL #4 Describe a…

- *Compelling cause* that is connected to a…
  Concrete goal that will be fulfilled by focusing energy and effort, prayer and perseverance on…
  Two vital behaviors that are most likely to create…
    - *Motivation* (willingness) and

    - *Skill development* (ability) to accomplish the goal and fulfill the cause.

- Example 1 – Focus on the proclamation of the Gospel for the salvation of humankind:
    - *Compelling Cause*: People need to encounter Jesus Christ and a personal invitation to church is the most effective way for that to happen, as 50% of friends will say yes to a personal invitation.

    - *Concrete Goal*: FPC members will invite 100 friends to come to church with them during Lent. (Not concrete: We will begin to emphasize the importance of invitations.)

    - *Vital Behaviors for proclaiming the Gospel for the salvation of humankind:*
        - We will (a) print business cards that can be used when inviting a friend and
        - We will (b) write/guide/teach/practice a script to build members' comfort level when inviting a friend.

- Example 2 – Focus on preservation of the truth (discipleship)
    - *Compelling Cause*: People encounter Jesus Christ in the Word and experience deep, personal transformation; this is especially true in groups as adult learners go deeper when in community.

    - *Concrete* Goal: We will have 75 new people participate in adult study groups between Labor Day and Thanksgiving. (Not concrete: We will make a push for more adult education.)

    - *Vital Behaviors for preservation of the truth (discipleship):*
        - All of our adult Bible studies will (a) use a user-friendly, completely intuitive format, and
        - (b) be time-limited groups that respect people's busy schedules.

- Example 3 – Focus on the promotion of social righteousness
    - *Compelling Cause*: People encounter Jesus Christ through a faith community that lives as a reflection of God's light and love, while attractional models of church fail to engage our culture.

    - *Concrete* Goal: We will create six new missional initiatives between Labor Day and Memorial Day. (Not concrete: We will try to be more missional.)

    - *Vital Behaviors for Missional Ministry:*
        - We will (a) create *operational clarity* by defining the term "missional" and what is meant by "missional ministry" in sermons, lessons, and printed material toward the goal of 95% comprehension among our members, and
        - (b) encourage our members to create and initiate their own projects by *redesigning the way we budget for mission* such that all missional projects that include three or more members will be funded by the church.

MODEL #5 *Describe your mission in terms of Identity in Christ, which inspires motivation to understand why something is important, which leads you to live a particular way.*

- We are... (identity statement/description)
    - Therefore we do Member Care *because…* (why statement/purpose/motivation)
        - Therefore we *intend* to do member care in this way... (what/how statement)

- We are… (identity statement/description)
    - Therefore we Worship and Celebrate *because…* (why statement/purpose/motivation)
        - Therefore we *intend* to worship in this way... (what/how statement)

- We are… (identity statement/description)
    - Therefore we do Education *because…* (why statement/purpose/motivation)
        - Therefore we *intend* to educate in this way... (what/how statement)

- Continue "We are…" for the Great Ends, as well as prayer, stewardship, leadership, etc.

MODEL #5A *Another congregation structured the statement by titling sections:*

- Who We Are
- Who We Are Becoming
- Why We Desire to Become Who We Are to Be

*****

- What We Are to Do
- How We Are to Do It
- Why We Desire to Do What We Are to Do

Steps for Using a Mission Study Writing Exercise

It is impossible to write a coherent document as a group, especially as a large group. However, every congregational document will be improved through wide participation of church members and friends. The following exercise can be used to solicit insight, perspective and conviction for the congregations' writing team tasked with crafting the final form of the church's mission study. The exercise is best designed as a mini-retreat and can be expected to take 2 ½ to 3 hours.

Prepare a church-wide event by issuing invitations. In advance of the meeting, choose which of the model(s) above you want to use in small groups. You may choose to have each small group use the same model (for focus) or assign several models (for variety).

1. Remembering the church's foundations: Open in prayer and then begin with members participating in a preliminary exercise that reminds all participants of the congregation's history, identity, and current challenges. Helpful tools for remembering the church's foundations include the following and can be found in the season of examination section:
    - Journey Wall
    - Neighborhood Walk (or Prayer Walking)
    - MissionInsite Database report and/or
    - Appreciative Inquiry Exercise

Alternative to #1: If time constraints at a particular congregational event do not allow for full participation in one of the foundation-setting exercises listed above, an alternative is for leaders to summarize gleanings from what the congregation has learned to date about themselves and their history, identity, and current challenges. (**20 to 30 minutes**)

2. Describe each writing model to be used and form the small groups by inviting participants to self-select the model with which they are most comfortable. (**10 minutes)**

3. Each small group designates one writer—she or he will craft the narrative but not participate in the group's dialogue. The designated writer is to listen, listen, listen. (**5 minutes**)

4. The first five minutes of small group time should be spent in silence to allow the introverts to ponder what is important and what ideas they might have. (**5 minutes**)

5. Announce to the groups that they are to discuss what could or might be written, but do not allow the designated writer to put anything on paper; she or he is to listen the others' ideas only. Groups are to discuss what they want to write. (**15 minutes**)

6. Give the rest of the group a break and ask the designated writer to spend 15 minutes crafting a response that uses the assigned template. (**15 minutes**)

7. When the group returns, have the entire group respond to what they like about what has been written on their behalf. Each person must share something they like. Only after everyone has said something she or he likes can the group begin to suggest edits to the writer. The writer, and only the writer, has the final word on what gets written. She or he is free to accept the edit, use the edit in adapted form, or reject the edit. (**15 minutes**)

8. Have each small group present to the entire group what they have written. (**15 to 20 minutes**)

9. As a large group, discuss what has been presented: (**15 to 20 minutes**)
- What themes or commonalities emerge?
- Where are the differences in assumptions or perspective? In hopes and dreams?

10. Thank participants, close in prayer, and give the data sheets to members of the discernment task force (e.g. Session, an Action Learning Team, etc.) for them to use as the mission study is crafted into its final form. (**5 minutes**)

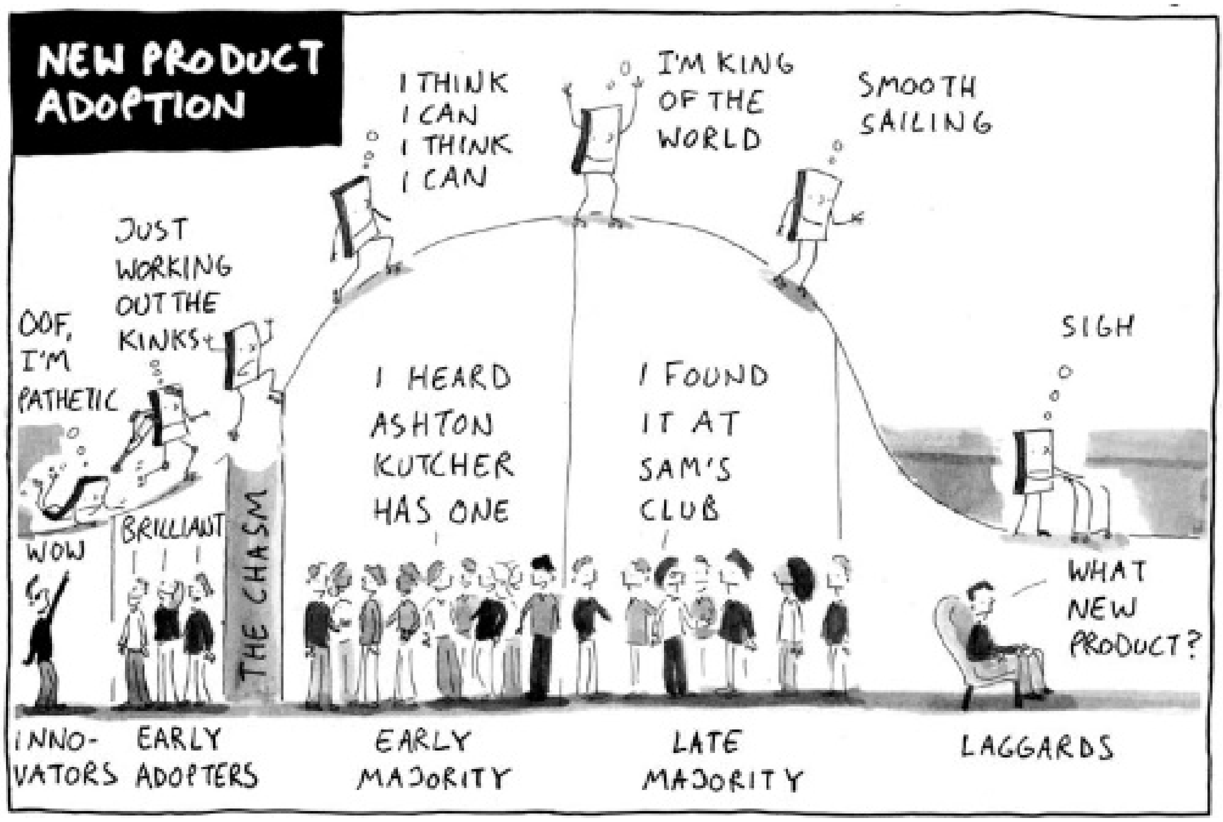
Organizational Change and Adaptive Leadership

Interim ministry is a time of organizational change; almost always there is some change needed, even in the healthiest of congregations. Sometimes this change is critical. Whether it is a minor tweak or a major over-haul that is needed in the congregation, it is helpful for the interim pastor to have some basic understanding of organizational change dynamics. This section provides some *basics* of organizational change.

Transition Curve[15]

The cartoon below depicts the transition curve. I describe the transition curve like this: Steve Jobs (Innovator) creates the IPhone. My friend Marc (Early Adopter) stands in line all night to be the first one to buy a new IPhone. My wife Laura (Early Majority) buys one a few months later and teaches herself how to use it. Me, (Late Majority), I wait six months to buy my IPhone so Laura can teach me how to use it. Some people (Laggards) still have a flip phone.

In congregations, very few pastors have the organizational sophistication to understand the nuances and change mechanisms required to move from stage to stage along the transition curve. What all pastors can do, however, is to aim toward the middle-third. The first-third folks are "on-board" with new ideas because they always are. The last-third folks will never get fully "on-board" with change and new ideas because that is how they function. The ability for a congregation to experience organizational growth and reformation, therefore, depends on the middle-third folks. Congregational leadership, either clergy or laity, will create organizational change to the extent they can convince the middle-third folks.



Technical Fixes vs. Adaptive Challenges

We have all heard the old joke: “How may Presbyterians does it take to change a light bulb?” “Change? Who said anything about change?” We live in an era in which changing leadership dynamics have come to the fore in conversations about ministry. Gone are the days when Bible, theology, church history and a little preaching were sufficient course studies to prepare one for ministry. Gone are the days when churches could open their doors and *expect* their pews to be filled. Gone are the days of late modernity; here today are the days of post-modernity, a time when Christian faith is no longer the default assumption of the dominant culture, a time when the church must learn to change.

In today’s world, ministry assumptions are challenged, ignored or presumed to be irrelevant. In today’s world, budgets are tight; staffing is being down-sized. In today’s world, churches routinely wonder—and wander—in search of mission and vision statements that do more than sound nice but might actually guide a leadership team’s decision-making processes. Into this day has come a core of literature about what it means to be a leader for today’s world and for today’s church. Current leadership studies talk about this tension in terms of “adaptive challenges” or “adaptive leadership.”

Adaptive challenges are not about mere change but about wholistic growth as God is calling the Church to grow deeper into the image of Christ. The literature distinguishes between “technical fixes” and “adaptive change” and focuses on becoming leaders able to learn, grow and adapt to the new, ever evolving challenges of ministry. A technical fix rummages around the box for the right tool (that must have been misplaced); adaptive leadership asks, “Do we even need a tool? What would happen if…?” A technical fix looks around the table and asks, “Which of us would do this best?”; adaptive leadership asks, “Who else needs to be at the table?” A technical fix works very, very hard to do the same things in ever more efficient ways; adaptive leadership seeks to learn what is necessary to understand what is possible in order to try what has never been attempted. Harvard professor Ronald Heifetz describes the distinctions between the technical and adaptive as follows:[16]

Technical Fix	Adaptive Change
Solutions are already known	Solutions are not yet revealed
The skill set required for leading currently exists	A new skill set is required for leading
Leadership seeks known answers	Leadership asks many questions
Solutions always come from within the present system	Solutions often come from beyond the present system
Problems quickly solved with limited confusion	Problems require ongoing conversation, sustained discomfort leading to perseverant dialogue
Leaders manage with their expertise	Problems solved by wrestling together, collective intelligence
Episodic conflict occurs	Persistent conflict occurs requiring the work of ongoing transformation

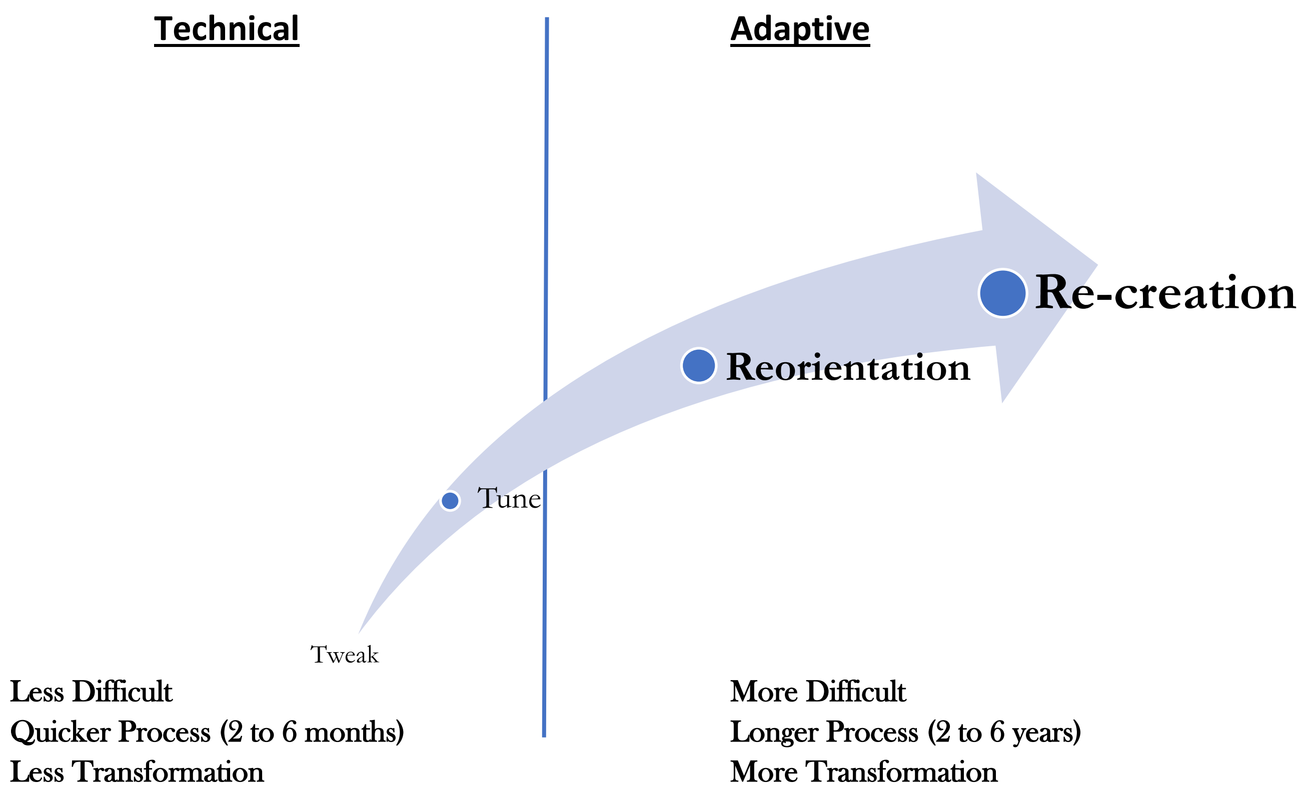
The distinction between technical and adaptive is more than a philosophical notion about leadership. Russell Crabtree, a ministry consultant and researcher who has worked with over 1,300 congregations from across the spectrum of mainline denominations, demonstrates that one of the strongest predictors of church vitality is a congregation’s ability to adapt.[17] Crabtree tracked churches’ four-year worship attendance and discovered the following patterns:[18]

- Conservative and highly adaptable: +1.0%
- Progressive and highly adaptable: -5.7%
- Progressive and least adaptable: -11.4%
- Conservative and least adaptable: -16.7%.

Clearly, congregations are struggling to maintain their worship attendance in today's post-Christian culture. However, it is also clear that adaptability is a path toward positive movement. To put these number into a Presbyterian, Reformed faith perspective, we might reframe the above chart as follows:

- The Church Reformed and Always Reforming: +1.0% to -5.7%
- The Church Reformed but Never Reforming: -11.4% to -16.7%

The graph below seeks to visualize the difference between a congregation's typical response to a problem, which is to try a technical fix, versus what it might look like to lean into an adaptive response.



The tendency in most churches is to seek technical fixes because they are less difficult to implement—a mere tweak or minor tune-up is all that is required—move from question to answer more quickly, and are able to be discussed, decided and delegated during the same Session meeting. The only downside to technical fixes is they don't lead to transformation of mission or vision, ministry values or vitality. Conversely, adaptive change is quite difficult to implement—requiring significant changes to both the why, the what, and the how of ministry. The adaptive requires both a lengthier conversation and a broader dialogue that can take months if not years. The upside to adaptive work is there exists the real possibility for the kind of God-inspired, God-guided transformation for ministry necessary for today's world.

In many of our ministries, we seem to be answering questions that are no longer being asked by the culture. In many of our ministries, we seem to spend an enormous amount of effort and energy ensuring that we do what we have always done, only better. Yet there is hope, for in some of our ministries, we seem to be asking the right questions: "What do we have to *become* to be able to discuss these questions in meaningful ways? What is our purpose today?" In some of our ministries, we seem willing to engage in the journey of learning new ways to minister the Gospel of Jesus to a spiritually hungry, compassion desiring, justice-craving culture. What would it look like for your Session or your congregation to have the kind of conversations in which adaptive challenges are engaged? Such conversations require communities of radical humility, uncommon honesty and a willingness to listen, listen, listen. Only communities of sensitivity, trust, and care are able to engage in such conversations.

But there's a problem—a big problem!

As related to interim ministry, the interim pastor *cannot facilitate adaptive change in the congregation*. The timeline for adaptive change is measured in years rather than months; even a longer interim period is insufficient time for the practices of adaptive leadership to take effect and create either reorientation or re-creation. Why, then, is this section in the interim training manual? While adaptive change may not occur under "the interim pastor's watch," the interim pastor can begin to facilitate the kind of leadership ethos in which elders, deacons and congregants begin to *think adaptively rather than technically*. To the extent the interim pastor can plant the seeds for an "adaptive ethos," organizational questions will be addressed through a horizon focus and with questions that seek healthier, more sustainable practices.

DISCUSSION, DIALOGUE AND DISCERNMENT

What are your experiences with inviting, facilitating, or leading adaptive change?

What are key challenges when seeking to lead adaptive change?

How have you found success (or even encouragement) when leading adaptive change?

Organizational Motivation and Adaptive Change Checklist

In his book *Influencer's*, Joseph Grenny posits six motivational dynamics that influence organizations like churches toward accepting, embracing, and living into change. Grenny places these six influences into a 3 x 2 grid (see figure to the right).[19] For Grenny, it is not enough for one to be willing if one is not able, just as it is irrelevant if one is able but not willing. Willing and able go together like summer and apple pie. As well, Grenny argues that while most motivational speeches aim toward the individual—one's personal willingness—just as necessary to target are social and structural influences—the forces of the group and its organizational structures—if one wants to produce effective growth and change.

The chart merges Grenny's work with the distinctions between technical fixes and adaptive leadership found in the work of Ronald Heifetz. Church leadership tends to operate in the technical column rather than the adaptive column, yet churches seeking revitalization would do well to learn adaptive ways.

What follows in the chart below is a check-list for adaptive change that offers specific, concrete questions church leadership can ask of themselves regarding the challenges they confront and attempt to solve, as well as the means by which they seek to overcome these challenges. To paraphrase the comedian Jeff Foxworthy, "You might need adaptative leadership if…."

As noted above in the previous section describing the differences between technical fixes and adaptive leadership, the interim pastor's function is not to create adaptive change but shape the environment in which it might flourish. The biblical metaphor of planting and nurturing seeds is cogent here. The interim pastor may never experience the fruit of their labors, but the congregation will experience the joy of the harvest.

Technical	**Adaptive**
__ Is it a problem familiar in the past?	__ Is it a challenge of the emerging future?
	__ Did it "come out of the blue," a surprise you didn't imagine would come your way?
Personal Willingness	**Personal Willingness**
__ Is the problem within the range of expectations regarding one's comfort zone?	__ Does the challenge reasonably create anxiety even among those not prone to feeling anxious?
	__ Are people having to step out of their comfort zones?
	__ Has a sense of urgency been created?
Personal Ability	**Personal Ability**
__ Is a known skill or expertise sufficient to solve the problem?	__ Is a new or as yet undiscovered competency required to engage the challenge?
	__ Are people having to learn a new skill?
Social Willingness	**Social Willingness**
__ Is there a history of shared vision or common expectations around the problem?	__ Is a new vision of the world needed that is not yet shared widely in the congregation?
	__ Is the congregation challenging their own assumptions?
	__ Is the congregation willing to take action that is uncomfortable and changes their rhythms?
	__ Are people saying, "This doesn't look/feel like church?"

Social Ability	Social Ability
__ Does the solution comes from within the system?	__ Are you as a congregation uncertain about your insight, experience or competency to engage the challenge? __ Is this something that both has not been tried before and not even imagined? __ What is the *congregation* having to learn to conduct this experiment in ministry?

Structural Willingness	Structural Willingness
__ Are your By-Laws and Manual of Operations sufficient to address the problem?	__ Does your current means of operating present an obstacle to overcome? __ Is there a willingness to experiment with a new administrative structure that will appear to the "old school" folk as lawlessness and chaos?

Structural Ability	Structural Ability
__ Is your building suited to address the problem? __ Are the conflicts that will evolve/occur as you address the problem within the range of expectations for previous difficulties: "We've been here and done this before"?	__ Might you need to alter or move beyond your building to engage the challenge? __ Might you need to adapt Reformed governance toward permission-giving, rewarding creativity, or cell-based initiatives?

Discussion, Dialogue and Discernment

Divide into groups of three. Each person should choose one topic from among the six listed above (e.g. Personal Willingness, Structural Ability, etc.) they want to talk about in the triad. Speak to any or all of the following questions:

1. How do you imagine this topic can help facilitate adaptive change?

2. What do you imagine will be the easiest and most difficult part of this topic to accomplish?

3. What questions do you have about how this topic can help facilitate adaptive change?

Appendix A:

Overview of Family Systems Theory

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Overview of Family Systems Theory

Bowen's Eight Concepts of Family Systems Theory[20]

Concept #1 – Nuclear Family Emotional System (pp. 5-26)

1. Two types of anxiety:
    a. Acute – limited, situational, triggers physiological reaction
    b. Chronic – "additive" anxiety that builds up over time as patterned behavior

2. Anxiety in families tends toward one of two responses:
    a. Individuality – we want to be separate, be distinct, our own person
    b. Togetherness – we allow ourselves to be defined by the group
        i. Fusion – too much togetherness is described as "fusion," which is the sense that one's thinking, feeling and behaving is directed by the group dynamic more than one's core principles, values and beliefs

3. Families togetherness tends toward fusion, which is expressed as:
    a. Triangling
    b. Conflict
    c. Distancing
    d. Over/Underfunctioning

Coaching Pointer

Notice and interrupt the unhealthy patterns within the system.

Concept #2 –Differentiation of Self Scale (pp. 27-46)

1. Lower differentiation of self is expressed as:
    a. Fused togetherness in relationship
    b. Fused thinking and feeling dynamic
    c. Definition of self through lens of group
    d. Definition of beliefs through lens of group
    e. Tends to transmit anxiety reflexively, automatically, instinctually

2. Higher differentiation of self is expressed as:
    a. Definition of self as core convictions, values and beliefs

b. Tends to tolerate and express individuality yet remain in relationship
c. Tends to clarify one's own thinking and feeling

3. Distinction between higher and lower differentiation of self a function of:
    a. Basic Self:
        i. Higher on scale
        ii. Private identity
        iii. Strong boundaries
        iv. Led by principle
    b. Pseudo Self:
        i. Lower on scale
        ii. Public face/persona
        iii. Porous boundaries
        iv. Blurs feelings and facts

Coaching Pointer

Work on Self-definition and connection in relationships (also called self-differentiation)

Concept #3 – Triangles (pp. 47-56)

1. Triangles are the basic building block of relationship – like a molecule
    a. Two person relationships are fundamentally unstable
    b. Three person relationships are sought instinctively, unintentionally, inevitably
    c. Uncomfortable person in the two person relationship is often the one who initiates the triangle in order to bring in a third party, thereby making the third party the new uncomfortable one in the triangle.

2. Nature of Triangles:
    a. Automatic, learned in family
    b. Constantly in motion

3. Well-known moves to create a triangle:
    a. Gossip
    b. Rumor mongering
    c. Insinuations

4. Triangling and group-think:
    a. Often when a large group is "triggered" by an issue, the group triangles with the issue only to discover the issue is not the source of anxiety.
    b. It's about our relationships!

5. De-triangling?
    a. There is no such thing as "detriangling," only moving to an outside position in which one is self-defined and living from one's "basic self."

Coaching pointers

Stay calm Stay connected to both sides of the triangle Put the two, other sides of the triangle together Best work is to help leaders stay calm, clear and connected

Concept #4 – Cut-off (pp. 57-64)

1. Cut-off is the process of separation, isolation, running away or denying the importance of one's nuclear family:
    a. Includes all relationships but especially with one's family
    b. Internal (psychic) or geographic (location)
        i. May be a combination of emotional isolation and physical distance
    c. Gradual or sudden
    d. Mutual or unilateral
    e. Chosen or forced

2. Cut-off is a reaction to fusion with parents and expresses discomfort with the fusion

3. Cut-off is likely to lead to more intense expressions of similar patterns found in parental marriage as well as lead one's children to do the same

Coaching Pointer

Stay connected with one's parents, children, colleagues, employees, etc.

Concept #5 – Family Projection Process (pp. 65-75)

1. The fundamental family projection of anxiety originates from the father-mother dynamic projecting anxiety on to their child to create a Father-Mother-Child triangle. Such fundamental triangles often have the following characteristics:
    a. Automatic, not chosen
    b. Varying levels of intensity
    c. Universal – (everybody does it and has had it done to them!)
    d. Off-loads Father-Mother anxiety on to the child
    e. Negative or positive focus matters not; each is a projection of anxiety
        i. Neglect or over-focus amount to a similar dynamic

2. The family projection process is different for different children
    a. Other siblings experience less anxiety, less communication, less cut-off from the parents

3. Fusion between parents and child is both an expression of the parents' lower self-differentiation as well as leads to a lower self-differentiation in the child.
    a. As parents' self-differentiate, the child often "drops symptoms and show better development" (72).

4. Factors that tend to lead toward family projection, (and the fusion that accompanies it), are:
    a. Time of birth
    b. Focus on youngest or oldest
    c. Sibling with a problem
    d. Child with a handicap

Coaching Pointers

Don't over-focus
Don't over-function
Don't react
Keep calm, calm, calm!

Concept #5 – Multi-Generational Transmission Process (pp. 75-84)

1. The multi-generational transmission process (MGTP) is "simply the family projection process writ large through the generations" (76).
    a. The MGT process is diagrammed using a *genogram*, which is a kind of psycho-social family tree

2. As children move forward through the generations:
    a. Greater fusion with one's parents leads to a lower level of self-differentiation
    b. Equivalent fusion (as parents had with grandparents) leads to essentially the same self-differentiation
    c. Lesser fusion with one's parents leads to a higher level of self-differentiation
        i. Benefits include:
            1. Avoiding cut-off
            2. Feeling connected
            3. More grounded
            4. Better functioning

3. Key FACTS to look for in the multi-generational transmission process (genogram):
    a. Longevity of family members
    b. Health
    c. Locations lived; dates moved
    d. Professions and income
    e. Reproductive histories, including births, deaths, abortions and miscarriages

4. Key THEMES to look for in the multi-generational transmission process (genogram):
    a. Death
    b. Survival

c. Reproduction
d. Money
e. Religion
f. Separation and divorce

5. Key NODAL POINTS and WATERSHED EVENTS to look for in the multi-generational transmission process (genogram):
    a. Nodal Events:
        i. Birth / loss of a child
        ii. Grandparents becoming incapacitated or moving in
    b. Watershed Events:
        i. Immigration
        ii. Severe suffering
        iii. War, famine, holocaust

Coaching Pointers

Get the factual history of a family or organization

Pay close attention to nodal points and watershed events

Play the role of a researcher, "I wonder…"

Concept #7 – Sibling Position (pp. 85-100)

1. Sibling position recognizes it is not just parents who affect children but a child's siblings also affect one another
    a. The dynamics of sibling position are a matrix of ORDER (oldest to youngest) and MIX (male, female, male/female, twin and only)
    b. Characteristic descriptions – c.f. pages 88-92

2. Pairing possibilities in couples:
    a. (Relationships move from easier – a, b and c – to more difficult – d, e and f)
    b. Without rank or sex conflict (e.g. oldest brother of sisters, youngest sister of brothers)
    c. Partial sex conflict (e.g. oldest brother of sisters, youngest sister of sisters)
    d. Rank or sex conflict (e.g. oldest brother of sisters, oldest sister of brothers)
    e. Rank or partial sex conflict (e.g. oldest brother of sisters, oldest sister of sisters)
    f. Complete rank and sex conflict (e.g. oldest brother of brothers, oldest sister of sisters)

3. Key characteristics of sibling position:
    a. Oldests: overfunctioning
    b. Youngests: underfunctioning
    c. Two oldests: conflict
    d. Two youngests: flounder but no conflict
    e. Onlys: more distant
    f. Oldest and youngest: invites over/underfunctioning

4. Benefits of understanding sibling position:
    a. Invites tolerance, understanding and self-awareness
    b. Invites taking glitches less personally
    c. Helps folks get unstuck when in patterned conflict

Coaching Pointers

Be aware of your own sibling position

Become aware of how your sibling position interacts with others

Concept #8 – Emotional Process in Society (pp. 101-115)

1. During periods of societal anxiety families tend to follow the same cyclical pattern:
    a. Anxiety leads to fusion, immaturity and emotional thinking
    b. Calm, principled behavior leads to maturity and progression
    c. Current societal timeline (1950 to present) indicates increased anxiety and patterns of increasingly destructive behavior (e.g. drug use, unmarried child bearing, etc.)

2. The helping professions have not helped!
    a. Four symptoms have systematically disempowered parental leadership, cultivated immature relationships, and distorted the appropriate and healthy role parents have in healthy families:
        i. Permissiveness in childbearing
            1. "Parents unsure or unable to take a leadership role in their own families" (105).
        ii. Pleasure principle
            1. If main goal = avoid pain and increase pleasure, then integrity, commitment and other signs of maturity are compromised
        iii. Sexual revolution
            1. Freud, Kinsey, et. al. legitimized emotionally immature expressions of sexuality
        iv. Blaming of parents
            1. Leads away from self-awareness, responsibility and acting from core convictions

3. Societal regression – challenge and opportunity:
    a. "When the anxiety in a system increases, people tend to do more of what they have always done…creating a vicious cycle" (110).
    b. "A regression that began in a relationship system can be resolved in a relationship system" (110).

Coaching Pointers

Calm one's emotions – learn the facts, focus on facts.
Start to think systems.
Step out of patterned positions.
Take positions based on principle.

Rabbi Edwin Friedman[21]

Rabbi Edwin Friedman built upon Dr. Murray Bowen's eight concepts of Family Systems Theory and applied it to the congregational life of synagogues and churches. While providing a thorough summary of Family Systems in *Generation to Generation*, Friedman advanced his thinking in *A Failure of Nerve* (published posthumously) to apply Family Systems to the problem of leadership. For Friedman, managing one's Self is a leader's primary responsibility, especially given that leaders will be confronted by resistance and sabotage due to widespread anxiety in our culture and congregations.

Core Concepts in Dialogue

One way to understand Friedman is to see him as engaging a conversation between two core concepts: homeostasis and differentiation of self.

1. **Homeostasis (balance):** "Homeostasis is the tendency of any set of relationships to strive perpetually, in self-corrective ways, to preserve the organizing principles of its existence. The concept of homeostasis brings out the resistance families have to change. (*Generation to Generation,* p. 23)

2. **Differentiation of Self:** "Differentiation means the capacity of a family member to define his or her own life's goals and values apart from surrounding pressures, to say 'I' when others are demanding 'you' and 'we.' It includes the capacity to maintain a (relatively) non-anxious presence in the midst of anxious systems, to take maximum responsibility for one's own destiny and emotional being." (*Generation to Generation*, page __)

For Friedman, a self-differentiated leader evokes resistance and sabotage simply by being self-differentiated. Therefore, the task of leadership is to remain true to one's core values, persevere in maintaining one's integrity, while remaining connected to one's flock (and therefore resisting the temptation to fuse with them, blame them, or cut them off).

The Self-Differentiated Leader has,

1. the capacity to separate oneself from surrounding emotional processes,
2. the capacity to obtain clarity about one's principles and vision,
3. the capacity to self-regulate one's emotions when confronted by reactive sabotage,
4. the willingness to be exposed and be vulnerable,
5. the willingness to emphasize strength, not pathology,
6. the willingness to emphasize challenge, not comfort,
7. the willingness to emphasize differentiation in self and invite it from others, not herding for togetherness,
8. the willingness to question the widespread triumphing of data over maturity, technique over stamina, and empathy over personal responsibility,
9. the persistence to face resistance or downright rejection.

The Undifferentiated Leader

1. is a highly anxious risk-avoider,
2. is more concerned with good feelings than with progress,
3. is one whose life revolves around the axis of consensus,

4. prefers peace to progress,
5. mistakes another's well-defined stand for coercion,
6. fails to see how in any family or institution a perpetual concern for consensus leverages power to the extremists,
7. lacks the nerve to venture out of the calm eye of good feelings and togetherness and weather the storm of protest that inevitably surrounds a leader's self-definition.

Friedman Quotes: *A Failure of Nerve*

"Chronic anxiety is systemic; it is deeper and more embracing than community nervousness. Rather than something that resides within the psyche of each one, it is something that can envelope, if not actually connect, people. It is a regressive emotional process that is quite different from the more familiar, acute anxiety we experience over specific concerns. Its expression is not dependent on time or events, even though specific happenings could seem to trigger it, and it has a way of reinforcing its own momentum. Chronic anxiety might be compared to the volatile atmosphere of a room filled with gas fumes, where any sparking incident could set off a conflagration, and where people would then blame the person who struck the match rather trying to disperse the fumes. The issues over which chronically anxious systems become concerned, therefore, are more likely to be the focus of their anxiety rather than its cause." (*A Failure of Never,* p. 58)

"Eventually I came to see that this 'resistance,' as it is usually called, is more than a reaction to novelty; it is part and parcel of the systemic process of leadership. Sabotage is not merely something to be avoided or wished away; instead, it comes with the territory of leading, whether the 'territory' is a family or an organization. And a leader's capacity to recognize sabotage for what it is—that is, a systemic phenomenon connected to the shifting balances in the emotional processes of a relationship system and not to the institution's specific issues, makeup, or goals—is the key to the kingdom. (*A Failure of Never,* p. 11)

"Those five characteristics are: 1. Reactivity: the vicious cycle of intense reactions of each member to events and to one another. 2. Herding: a process through which the forces for togetherness triumph over the forces for individuality and move everyone to adapt to the least mature members. 3. Blame displacement: an emotional state in which family members focus on forces that have victimized them rather than taking responsibility for their own being and destiny. 4. A quick-fix mentality: a low threshold for pain that constantly seeks symptom relief rather than fundamental change. 5. Lack of well-differentiated leadership: a failure of nerve that both stems from and contributes to the first four." (*A Failure of Never,* p. 60)

"Leadership through self-differentiation has a significantly different effect on the paradox of resistance than do the models of leadership through charisma or consensus. It eliminates the leverage of the dependent; it reduces conflict of wills; and it accomplishes these without increasing the potential for cloning." (*A Failure of Never,* p. 231)

"Leaders who keep on working on their own self-differentiation, "...automatically challenge their followers to do the same and, thus, maximize the process of self-differentiation throughout the entire family." (*A Failure of Nerve,* p. 233)

"Leadership through self-differentiation is not easy; learning techniques and imbibing data are far easier. Nor is striving or achieving success as a leader without pain: there is the pain of isolation, the pain of loneliness, the pain of personal attacks, the pain of losing friends. That's what leadership is all about." (*A Failure of Never,* p. 247)

Applying Friedman to Interim Ministry

In Presbyterian churches, our polity disperses authority, but it cannot disperse leadership. Here are some helpful questions an interim pastor can ask themselves regarding their own leadership:

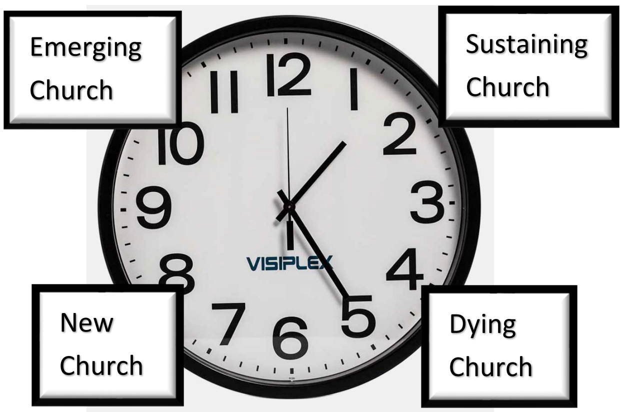
1. What helps me focus on my responsibility for self—managing my own emotions and functioning rather than focus on others?
2. What helps me function as an emotional "dampener" (anxiety stops with me) rather than an emotional "transformer" (passing anxiety along)?
3. When I feel anxious, what helps me avoid the temptations to defend myself and blame others, avoid others (cut-off)?
4. When I feel anxious, what helps me "speak the truth in love" rather than seek peace at all costs (fusion)?
5. What helps me have clarity about my values and goals before taking leadership action?
6. When encountering resistance or sabotage, what helps me express my core values?
7. What helps me have clarity about my responsibility (what "belongs" to me versus what "belongs" to others)?
8. What helps me maintain proper boundaries regarding my responsibility (not over or under functioning)?
9. What helps me lead (e.g. Session meeting) toward encouraging healthy boundaries, accountability and self-differentiation?
10. What helps me notice not just what I am saying (the words I use) but my posture and tone as well?
11. What helps me see my role in an emotional issue in the congregation such that I can encourage health by changing my role in future situations?
12. What can I do to function at my highest level?

Systems Assessment for Pastoral Leadership

Some pastoral leaders will be familiar with using a genogram or social map; however, most pastors will not. For pastoral leaders who understand the concept of but lack technical training in their use, here is a list of 20 questions that can be asked, which will function in a similar manner:

1. If you were to draw your congregation as an intricate web of relational connections, what would it look like?
2. Does the congregational anxiety trend toward being acute (situational) or chronic (perpetual and ongoing)?
3. What is the congregation's reactive, default, emotional response to a change?
4. Who "carries" the congregational anxiety most publicly?
5. Does chronic anxiety in the congregation tend to get expressed as distance or togetherness?
6. Who, specifically, tends to "cut-off" and who tends to "fuse with others"?
7. What do notice happening to relationships when conflict erupts?
8. How comfortable is your congregation talking about things when conflict is present?
9. Who in the congregation, specifically, tends to blame others versus looks at their own role?
10. Who is speaking for themselves alone versus who is speaking for others?
11. Who is using "I-Language" versus who is using "You-Language"?
12. How often do people take positions by communicating their principles or core values?
13. Where are the triangles?
14. Where (and how) are you being invited to take sides?
15. Where (and how) are you being invited to over-function or under-function?
16. Where (and how) are you being invited to agree with someone regardless of what you think about a subject?
17. Who maintains clear relational boundaries? What does that look like?
18. Who respects the boundaries of their role(s) and responsibilities? What does that look like?
19. What are you doing to manage yourself—especially your anxiety?
20. What helps you notice and be intentional about your tone and your posture when you speak?

Appendix B:
The Church Life-Cycle



The Church Life-Cycle is like a clock:

Every church begins at 6:00 a.m.

At 6:00 p.m. every church closes its doors.

What time is it at your church?

The Church Life-Cycle
Discerning the Time for Renewal

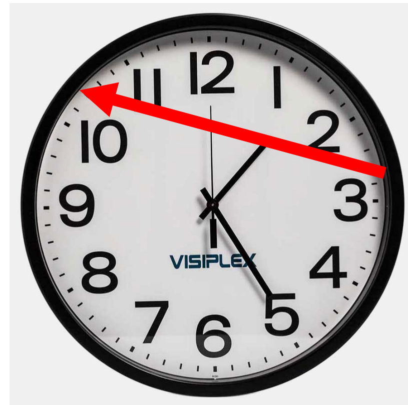
Every church has a beginning, a middle, and an end. For your church, we hope the end is many years into the future. Yet it is easy to become complacent, to imagine *our* congregation will always be on the corner of First and Main – closing is what other churches do. The unfortunate truth is that denominations close congregations every year; however, there is hope. By understanding the church life-cycle, congregations can become motivated to do the work of renewal and "reset" their congregation's clock.

Think of a typical church. Every church has a supply of Members, Energy, Money and Organization (M.E.M.O.). A church's MEMO quotient can be described in stages. A new church has its beginning at 6:00 a.m. Members are few, but energy is high. Money is sparse and organization lacking. For the new church, energy is their best asset, and their energy launches them forward in contagious ways as they grow in numbers, move forward in ministry, and begin to define who they are for the sake of Christ's mission to the world.

The emerging church is the congregation at 9:00 a.m. As the congregation has advanced, members have been added. Energy remains high, and, though not quite as frantic an energy as found in the new church, the energy of the emerging church is channeled in more focused directions to support the congregation's experiments in ministry and mission. Money, too, though still tight, is sufficient and used to support experiments in congregational ministry and community mission. Unfortunately, all the needed experimentation of the emerging church creates some ministry "wobbles" in communication, coordination, etc., so the emerging church must also work hard to develop its administrative, financial, and leadership policies and practices – the organization also develops.

The sustaining church is the congregation at high noon. In some ways, the sustaining church is the congregation at its peak; however, in other ways high noon is the beginning of the church's decline. The sustaining church at high noon is at or near its heights in members and organization, but energy and money begin to decline. The sustaining church knows who it is and how to perform their internal ministry with efficiency, as its practices have evolved over time and "everyone knows that this is how we do it." Unfortunately, the value of such efficiency is that new vision is minimized, new experiments get lost amidst the clutter or established ministries. Long established and valued relationships with mission partners don't allow space for responding to new mission partners. In the sustaining church, leaders know who they are, what they do, and how to do it, but may find it difficult to discern the Spirit's leading toward a new opportunity or an adaptive challenge.

The dying church is the congregation at 3:00 p.m. It is at this point church members begin to notice there are less members, less energy, and less money, but the organization is still robust! It is common for a congregation's administrative procedures to lag behind the new reality of fewer people, and the dilemma emerges that congregations begin to exist for the sake of institutional survival rather than missional thriving. The anxiety of the dying church becomes focused on the "Three B's" – butts, bucks and buildings. The dying church tells itself they need more butts in the pews to get more bucks in the offering plates in order to take better care of the buildings that are their legacy.



There is hope.

Healthy, transparent, robust conversations during the interim period can help congregations enter into a Season of Discernment toward answering the question: What time is it at our church? Church renewal specialists suggest the optimal time for a congregation to enter into a season of revitalization is somewhere between 1:30 – 2:30 p.m. It may be earlier or later at your particular congregation, but the key question for every Session is whether or not God is leading you to decide that *now* is the time for you to seek renewal together. If it is 12:06 p.m. or 4:12 p.m. at your church, you can still seek renewal. Renewal is easier for the congregation at 12:06 than at 4:12, but all things are possible with Christ who gives us strength (Philippians 4:13).

At the beginning of Jesus' ministry, he said, "The time is fulfilled, and the kingdom of God has come near; repent, and believe in the good news." (Mark 1:15) The Greek word for "time" used in Mark 1:15 is *kairos*, which denotes the key moment, the nodal moment, the decisive moment. *Kairos* time is the nine-month's pregnant wife who says to her husband in the middle of the night, "Honey, it's time." *Kairos* time is Dr. King calling our nation to account, declaring the time has come for people of good faith to stand for civil rights. *Kairos* time is contrasted with ordinary, chronological time (Greek: *chronos*). *Kairos* and *chronos* are two, very different perspectives on time.

This essay has been talking about the church life-cycle using *chronos* language, which helps a congregation understand where they are at this given moment. It is important to know, chronologically, what time it is at your church. However, it is even more necessary to know if it is "time" for your church to enter into a season of discernment. A healthy interim process asks congregational leaders this question:

Given where your congregation is in *chronos* time,

is it God's *kairos* for you and your congregation?

Appendix C:

Future Options for Churches[22]

Ministry-centric Options

Transformation / Reinvention of Ministry

One congregation seeks to radically change itself to bring new vision and life to its members and community. Make a change. Changes may be minor or dramatic and may include targeting a new audience. A revised ministry plan must be developed to include strategic and tactical considerations. Requires pastor, elder and congregational consensus.

- Energy required: high
- Financial resources required: high
- Spiritual challenge: high

Parallel Development

A new, "young" congregation is started within another congregation that may be declining. Celebrate the past with intentionality while inviting a future of new creation. Differs from "Nesting" below in that intention of all is for the younger congregation to increase while the older congregation decreases (i.e. "John the Baptist" model for ministry).

- Energy required: low (older), high (younger)
- Financial resources required: medium to high
- Spiritual challenge: very high (especially for older)

Church Without Walls / Mission-Shaped Community

The congregation worships anywhere, with a focus on supporting mission in life and work. Requires significant organizational management. May have a "visiting" minister.

- Energy required: very high
- Financial resources required: low to medium
- Spiritual challenge: high

Total Ministry

The congregation itself does almost all of the ministry; presbytery appoints a Session moderator, but there is no pastor or CRE. Presbytery needs to provide consistent oversight.

- Energy required: very high
- Financial resources required: low
- Spiritual challenge: medium to high

Home Church

There is no church building; congregational life happens in homes. Best suited for those willing to view efforts as "cell division" rather than "closed circle" community.

- Energy required: high
- Financial resources required: low to medium
- Spiritual challenge: medium to high

Conversion to Social Ministry

Congregation closes and the building is converted to house one or several community-service ministries. Requires development of corporate status and clarity of focus, purpose, clientele and services.

- Energy required: high (initial phase), low to medium (later)
- Financial resources required: low
- Spiritual challenge: medium

Shared-Ministry Options

Yoked Ministry

Two separate congregations share staff. May form a parish. May also share other resources and programming. Challenge to be clear about boundaries when congregations are "unequally yoked."

- Energy required: medium
- Financial resources required: medium
- Spiritual challenge: medium to high

Merger

Two or more congregations join together to become one, new congregation. They share in all aspects: building, worship, programming, staff, etc. Ministry model must be developed, and venue must be selected. New leadership of the new congregation will be representative of the predecessor congregations.

- Energy required: high to very high
- Financial resources required: low
- Spiritual challenge: high to very high

Fusion

Two or more congregations close and then form a new and different congregation. This new congregation may meet in one of the existing church buildings or else move to a building that's new to everyone. Differs from merger in that intent and focus is on mutual dissolution / break from past in order to create something new: "We are all laying down what we had to become a new entity." (Distinction from merger is subtle yet significant.)

- Energy required: high to very high
- Financial resources required: low
- Spiritual challenge: high to very high

Partnership

Two or more churches mutually support each other from their individual strengths. Differs from "Yoked" in that they do not share the same pastor but focus on sharing ministry-centric endeavors (e.g. routinely develop partnerships for crisis or specialty ministry, shared services, studies and/or worship events).

- Energy required: medium
- Financial resources required: low

- Spiritual challenge: medium to high

Satellite

One congregation has two or more sites. One Session oversees both sites' ministry, staff, etc. Care should be taken to avoid building ministry around a particular, charismatic leader.

- Energy required: very high
- Financial resources required: high
- Spiritual challenge: medium

Building-centric Options

Nesting / Shared Campus

One congregation "lives" in the building of another congregation. Staff, worship times, etc. are normally separate. Models vary, from allowing another congregation to "nest" in your space while the host congregation's ministry continues largely unchanged…to offering the bulk of the campus to other charitable organizations and hosting another congregation which becomes the dominant worshipping community on the site. Income derived helps to fund the host congregation's ministry.

- Energy required: medium
- Financial resources required: medium high
- Spiritual challenge: low

Relocation / Selling of Property

One congregation decides to sell their building and either move to a new location as a new mission opportunity, become a tenant in its former location, or rent space elsewhere. Property sale proceeds fund ongoing operations, mission, and ministry locally and beyond. Requires time to build consensus within the congregation before taking action.

- Energy required: medium
- Financial resources required: very low (until new purchase is made)
- Spiritual challenge: varies depending on model

Restart / Death and Resurrection

The church "goes dark" for a period of time and then "re-opens" as something new and different. Popular among non-denominational churches, this model involves new leadership, a new format, a new name…a new approach to ministry. Few current members would return.

- Energy required: very high
- Financial resources required: high
- Spiritual challenge: very, very high

Hospice / Chaplaincy Options

Age in Place

Do nothing significantly different. Cut expenses as needed through significantly reduced

pastoral services (move to weekly pulpit supply and/or chaplain model) to extend life of congregation until it cannot be extended any further due to lack of funds. Congregation declines until it dissolves.

- Energy required: low (for members), high (for staff – caregiving)
- Financial resources required: low
- Spiritual challenge: medium

Return to Fellowship Status

The congregation is "dissolved." Gatherings continue elsewhere, membership to the presbytery continues. There is no Session (only a Steering Committee), presbytery can add them to their insurance (though they would need to reimburse the presbytery), no per capita, no Annual Report to GA, etc.

- Energy required: low
- Financial resources required: low
- Spiritual challenge: low to medium

Closure / Dissolution

One congregation dissolves. The building is sold. Any remaining assets are distributed by the presbytery for ministry elsewhere. The congregation dies a well-planned and well-organized death. Members transfer their membership to other congregations, which should be an intentional initiative among remaining staff and/or presbytery. Property sale proceeds fund a legacy endowment in the church's name to fund designated ministry (e.g. New Worshipping Communities).

- Energy required: low to medium
- Financial resources required: low
- Spiritual challenge: low to medium

Heritage Church/Chapel

Congregational life ceases but building is saved and used for significant community and heritage events. Deed and restrictive covenants need to be crafted that define the boundaries and restrictions for future use.

- Energy required: low
- Financial resources required: medium
- Spiritual challenge: low

Appendix D:

Financial Best Practices 101[23]*

*Appendices D through F are provided as templates an interim pastor may use as resources, if they find the resources helpful. It is recognized there is a wide, diverse, broad, and variegated level of experience and expertise among pastors in the areas of finance and administration, as these are not core curriculum in seminary. However, ensuring a stable fiscal and administrative foundation is in place for the next pastor is a gift the interim pastor can pay forward to their colleague.

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Administration of church finances is a sacred trust, and it is important that a strong system of internal controls be established. Every church should have an outline of Internal Controls that will help to train new staff, volunteers, finance committee members and clergy of what is expected of them to maintain the integrity of the organization and trust of the congregation. Internal Controls are essential to protect the assets of the church from waste, fraud, and inefficient use.

An entity's internal control over financial reporting includes those policies and procedures that (1) pertain to the maintenance of records that, in reasonable detail, accurately and fairly reflect the transactions and dispositions of the assets of the entity; (2) provide reasonable assurance that transactions are recorded as necessary to permit preparation of financial statements and that receipts and expenditures of the entity are being made only in accordance with authorizations of management and those charged with governance; and (3) provide reasonable assurance regarding prevention, or timely detection and correction, of unauthorized acquisition, use or disposition of the entity's assets. Internal control objectives should include:

- Proper Authorization and Approval
- Proper Documentation and Accurate Recording
- Proper Physical Security
- Effective Detection

General Controls

a. Annual budget prepared

b. All employees screened/background checks prior to hire

c. Employees must take an annual vacation

d. Financials statements submitted and reviewed by the Pastor/Minister/Clergy and finance council on a monthly or at least quarterly basis.

e. Clean and thorough explanations and documentation are retained for all journal entries.

Offertory Collection Counting

a. Cash count procedures should be in writing and furnished to each member of the count team.

b. Church employees and their families should not be involved with the offertory collection.

c. No fewer than 2 unrelated individuals should count the collections and members of count teams should be rotated.

d. The collection should be counted in a secure location.

e. The count team should immediately restrictively endorse all checks.

f. The count should be entered on a summary sheet and signed by all count team members.

g. The count sheet should be prepared in ink.

h. The count team should prepare the deposit slip in duplicate. One copy for the bank and the other for the bookkeeper.

i. A member of the Finance Council (or equivalent) should compare the bank statement to the weekly count sheets.

j. An annual statement should be sent to the donors.

Bank Accounts

a. Whoever reconciles the bank statement should not be an authorized check signer on the account.

b. All bank reconciliations should be signed by preparer and reviewer.

c. The sequence of all check numbers should be accounted for.

d. Examine the paid checks for the date, name, endorsement and comparing them to the cash disbursements journal (checkbook)

e. Compare the detail of bank deposits to the cash receipts records.

f. Investigate other reconciling items

g. Follow up on old outstanding checks.

h. The number of bank accounts should be kept to a minimum.

Cash Receipts

a. The person opening the mail should be independent of the accounting records.

b. Pre-numbered receipts should be issued to those who bring money to the office for fees/donations, etc. Receipt should contain the date, name, amount and purpose of funds and be signed by the employee/volunteer who received the funds.

c. Receipts should be accounted for in numeric order.

d. Deposits for various tithing and offerings should be identified by source of income.

Cash Disbursements

a. All cash disbursements should be made by pre-numbered checks with the exception of petty cash.

b. All bills should be approved and evidenced in writing.

c. Blank checks should never be signed.

d. All paid bills should be filed by vendor or by month by fiscal year.

e. Voided checks should be marked VOID and retained.

f. Check stock should be kept in a locked cabinet/safe and inventoried on a regular basis.

g. All supporting documents should be given to the check signer to review before signing the check.

h. A check to CASH should be prohibited.

i. Individual checks should clearly identify the specific expenditure ·for the disbursement.

j. Dual signature over cash disbursement for amounts over $___ should be required.

Computer Controls

a. All computer files should be backed up on a regular basis at minimum, weekly and should be stored off site.

b. Passwords restrict usage of computer programs and are never shared or documented where others may find them.

c. Password should be changed regularly and should have numbers, symbols, and characters or a combination of all.

DISCUSSION, DIALOGUE AND DISCERNMENT

1. How comfortable are you engaging a conversation about finances or financial best practices on a scale of 1 to 10, with 1 being "not at all comfortable" and 10 being "very comfortable"?

2. For those self-scoring as less comfortable (on the lower end of the scale), what are ways you might delegate this to others? What level of engagement is needed from you to be a good steward of this conversation?

3. For those self-scoring as more comfortable (on the higher end of the scale), what are ways you might help the congregation own this work themselves rather than rely upon you to do it? What level of restraint is needed from you to empower the congregation?

Appendix E:
Guidelines for Church Financial Review[24]*

*Appendices D through F are provided as templates an interim pastor may use as resources, if they find the resources helpful. It is recognized there is a wide, diverse, broad, and variegated level of experience and expertise among pastors in the areas of finance and administration, as these are not core curriculum in seminary. However, ensuring a stable fiscal and administrative foundation is in place for the next pastor is a gift the interim pastor can pay forward to their colleague.

*****

The following are suggested procedures to be used by churches when they have their financial review to meet Presbytery/ Synod's directives. Some churches may not need to complete all aspects; however, theseguidelines should assist in keeping your church aware of its responsibilities and accountability to the congregation.

Conducting a Financial Review is a mark of responsibility; good stewardship demonstrated for all to see; anda message to the church donors that you care about their gifts.

The purpose for a Financial Review is:

To protect the person(s) the local church elects to office of financial responsibility from unwarrantedcharges of careless or improper handling of funds;

To build trust and confidence of the financial supporters of the church in the way their money isbeing accounted for;

To ensure there will be a continuity in accountability when there is a change in personnel;

To assure gifts to the church with special conditions attached are consistently administered inaccordance to the donor's instructions;

To provide checks and balances for sums received and expended.

Reviews of financial reports require that individuals performing the review have a reasonable familiarity with terms, concepts, and practices of the financial world. For the review to be useful and effective, the person orpersons performing it must do so in an objective and impartial fashion, and with the highest degree of integrity.

A Review should include examination of all of the funds of the church, not just the operating accounts; capital and other special funds, endowment and trust funds, assets of the church, organizations, investments, discretionary funds, and any other assets, liabilities, revenues, and expenses of the church.

Planning Stage of the Review

Planning involves understanding of the church's financial operations and assembling the various documentsthat are needed for the review.

Obtain a copy of the previous audit if available along with the Management's letter which details past reviewfindings and provides suggestions on how to improve the church's financial operations.

Obtain a copy of the annual financial statements.

Review procedures which are being used to account for church money. Identify individuals with responsibility for financial operations and decisions and verify with them all funds of the congregation havebeen included in the statements.

Identify all bank accounts and authorized check and withdrawal signers. Request that all accounting records of all funds be presented together including:

Organization Chart

Chart of accounts

General Ledger

Cash Receipts Journal

Cash Disbursements Journal

Bank Statements including canceled checks

Check Register

Blank checks are accounted for

Paid invoices

Individual payroll records including Forms W-4 and I-9

Federal and State payroll withholding reports

Passbooks and evidence of other investments

Pledge records by individual and total

Perform a preliminary analytical review of financial statements. This may consist of comparison of the current records to the previous year balances and to budget amounts. If needed, arrange a meeting with theTreasurer to review any variances, or clarifications.

Review internal controls: policies, procedures, and commitment to reasonably prevent material errors andirregularities from occurring or going undetected.

Internal Control Questionnaire

General

This will provide general information for an understanding of the overall accounting and internal controlsystem.

Circle the appropriate answer of, YES, NO, N/A.

1. Are prior internal control questions available? YES NO N/A

2. Have recommendation of prior reports been implemented? YES NO N/A

3. Is a complete and current chart of accounts available? YES NO N/A

4. Is the accounting system using a double entry bookkeeping method? YES NO N/A

Budget

5. Is the budget approved by the church? YES NO N/A

6. Are all changes to the budget authorized by the Deacons and recorded in the minutes? YES NO N/A

7. Is there a periodic review of the pledge? YES NO N/A

Reporting

8. Is a Treasurer's detail report submitted to the Deacons monthly?

9. Does it present actual to budget information?

10. Is there a quarterly report of all other funds and activities?

Cash Receipts

11. Are there safeguard to protect collections from time collected, counted and deposited? YES NO N/A

12. Are collection receipts and deposits receipts made Weekly? YES NO N/A

13. Are there at least two unrelated persons responsible for counting and depositing funds? YES NO N/A

14. Are persons counting receipts rotated periodically? YES NO N/A

15. Are there standardized forms for counting? YES NO N/A

16. Are counters sheets retained and reconciled with actual deposits? YES NO N/A

17. Is cashing of checks prohibited? YES NO N/A

18. Are Third party checks returned to donors? YES NO N/A

19. Are Pledge envelopes or other memoranda retained and reconciled to recorded amounts? YES NO N/A

20. Are other cash receipts recorded and deposited on a timely basis? YES NO N/A

21. Are all checks received restrictively endorsed "for deposit only" immediately upon receipt? YES NO N/A

22. Are there procedures which will highlight or identify the fact that some receipts or income has been received but not recorded? YES NO N/A

23. Are periodic statements provided to donors of their contributions at least quarterly? YES NO N/A

24. Do acknowledgements in excess of $250 include a receipt from the organization describing itself itself as “any goods or services provided consist solely of intangible, religious benefits? YES NO N/A

25. Are discrepancies investigated? YES NO N/A

Cash Disbursements

26. Are all disbursements made by check, except for small expenditures made by petty cash? YES NO N/A

27. Are all checks pre-numbered and used in sequence? YES NO N/A

28. Are all voided checks clearly canceled and retained? YES NO N/A

29. Are all checks made payable to specified payees and not to cash or bearer? YES NO N/A

30. Are all disbursements supported by original documentation? YES NO N/A

31. Is the original vendor’s invoice or other documentation marked at time of signature to avoid duplication? YES NO N/A

32. Is the signing of blank checks prohibited? YES NO N/A

33. Is the use of a signature stamp or pre-printed signatures prohibited? YES NO N/A

34. Does all supporting documentation accompany checks for signature? YES NO N/A

35. Are all account signers authorized by the church? YES NO N/A

36. Is more than one signature required for any check? YES NO N/A

37. If not, do checks over $500 require two signatures? YES NO N/A

38. If signature imprint machines are used, are the keys kept locked when not in use? YES NO N/A

39. Are all disbursements requiring special approval properly documented in minutes? YES NO N/A

Journal Entries

40. Is there an appropriate explanation accompanying each journal entry? YES NO N/A

41. Are all journal entries approved by a knowledgeable person of authority other than the person initiating the entry? YES NO N/A

42. Is adequate documentation maintained to support each journal entry? YES NO N/A

Bank Accounts

43. Are all bank accounts reconciled within 10 days of receipt? YES NO N/A

44. Are the task of opening and reconciling the bank statements performed by different people? YES NO N/A

45. Are the bank account reconciliations completed by someone other than the person who participates in receipt or disbursement of cash? YES NO N/A

46 . Does the reconciliation procedures provide for:

A. comparison of dates and amounts of deposits as shown on the bank statement with cash receipts journal? YES NO N/A

B. Investigation of bank transfers to determine that both sides of the transaction have been recorded? YES NO N/A

C. Investigation of all bank debit and credit memos? YES NO N/A

D. Review of all checks outstanding over 90 days? YES NO N/A

E. Voiding of outstanding checks during the year-end reconciliation? YES NO N/A

F. Is the bank immediately notified of all changes of authorized check signers? YES NO N/A

Petty Cash

47. Is the responsibility for petty cash fund assigned to only one person? YES NO N/A

48. Are all petty cash funds maintained on an "imprest" basis (the total amount of the vouchers paid or disbursed, plus cash, will always equal the amount of the fund). YES NO N/A

49. Is there adequate review of the documentation before the fund is reimbursed? YES NO N/A

50. Is the petty cash fund reimbursed at least monthly? YES NO N/A

51. Is the cashing of checks and loans to employees prohibited? YES NO N/A

52. Is the actual petty cash protected from theft or misplacement? YES NO N/A

Investments

53. Are all investment instruments held in the name of the church only? YES NO N/A

54. Is authorization for sale and /or purchase of investments provided for by the authorized committee/church? YES NO N/A

55. Are all investment instruments adequately protected from fire, theft or misplacement? YES NO N/A

56. Are interest, dividends, and unrealized gains or losses recorded? YES NO N/A

Property and Equipment

57. Is formal approval required for all property and equipment additions and and dispositions? YES NO N/A

58. Is a detail inventory of all property, furniture, fixtures, and equipment maintenance showing:

A. Date Acquired?	YES	NO	N/A
B. Detail description?	YES	NO	N/A
C. Cost or fair market value at time of donation?	YES	NO	N/A
D. Any funding source restrictions?	YES	NO	N/A

59. Is a periodic review conducted to:

A. Compare the actual property, furniture, and fixtures and equipment to the recorded inventory listing?	YES	NO	N/A
B. Ensure the adequacy of the insurance coverage?	YES	NO	N/A
C. Improve loss prevention?	YES	NO	N/A

Liabilities and Other Debt

60. Is all borrowing or indebtedness authorized by the appropriate committee? YES NO N/A

61. Are all loan agreements and/or lease agreements in writing and properly safeguarded? YES NO N/A

62. Are there periodic reviews conducted to determine compliance with any debt/lease provisions? YES NO N/A

63. Are all liabilities noted on Financial Statements/Reports to the appropriate committee? YES NO N/A

Restricted Gifts and Contributions

64. Are records maintained of all bequest, memorials, endowments, or other restricted gifts to include:

A. Date, amount, and donor of Gift?	YES	NO	N/A
B. Any restrictions or limitations?	YES	NO	N/A

65. Are all restricted gifts and grants approved by the appropriate body? YES NO N/A

66. Are the income and other transaction periodically reported to the appropriate body? YES NO N/A

67. Are written acknowledgements issued for all contributions other than pledges? YES NO N/A

Payroll

69. Are personnel files maintained to include:

A. Employment application and /or letter of employment?	YES	NO	N/A
B. Authorization of pay rates and effective dates?	YES	NO	N/A
C. IRS FORM W-4?	YES	NO	N/A
D. Department of Justice Form 1-9	YES	NO	N/A
E. State Withholding Forms?	YES	NO	N/A

70. Is there a written record of hours worked and approved by a supervisor when applicable? YES NO N/A

71. Are there adequate records to:

A. Show computation of gross pay?	YES	NO	N/A
B. Account of all deductions from gross pay?	YES	NO	N/A
C. Support payroll tax returns filed on a timely basis?	YES	NO	N/A

75. Are payroll tax returns filed on a timely basis? YES NO N/A

76. Are payroll tax deposits made on a timely basis? YES NO N/A

77. Are all employees, clergy, and lay receiving a Form W-2? YES NO N/A

78. Are Forms 1099 being provided for all individuals who are not employees, and for all unincorporated entities paid $600 or more annually? YES NO N/A

79. Are Forms W-2 wages reconciled to the general ledger accounts, and all four quarterly payroll tax returns? YES NO N/A

80. Are clergy housing allowances recorded in the minutesof the appropriate committee no later than the first meeting of the year? YES NO N/A

Computer Systems

81. Are current or duplicate copies of the operating system and programs maintained off premises? YES NO N/A

82. Are files backed up at least weekly and the backups maintained off premises? YES NO N/A

83. Is access to the computer and computer programs limited to authorized persons? YES NO N/A

84. Is there adequate documentation, including user manuals, available on-site for all computer programs? YES NO N/A

85. Is a printed copy retained of all journals, general ledger, financial statement and any other computerized records? YES NO N/A

Suggested Guidelines/Procedures for the Detail Review

Cash Receipts and Balances

1. Obtain a list of dates of Sundays and other services during the year at which collectionswere taken.
2. From this list choose a representative sample of dates. For each date chosen, obtain thedocumentation prepared by the counters.
3. Verify by addition the total amount recorded on the count sheet for each date. Note theamounts designated as pledge income and loose offering income.
4. Trace these amounts into the accounting records as cash receipts and note anydiscrepancy.
5. For each date, trace the total amount collected to a bank deposit slip and to the nextsubsequent bank statement. Note any discrepancy.
6. Obtain a summary of collection amounts by week and verify by addition the yearly totalof all weekly collections. Compare this total to the total pledge and loose offering income in the annual financial reports. Investigate and significant discrepancies.
7. Obtain a summary of restricted or designated contributions by week and verify by addition the yearly total of all weekly contributions. Compare this total to the total recorded in the annual financial reports or alternately trace a sample of weekly amountsto the accounting records.
8. Obtain or prepare a list of all bank accounts owned by the church and compare to lastyear's list, noting any changes. Trace any openings or closures to the minutes of the church governing body.
9. Obtain year end statement for all savings accounts and determine the fiscal year- end balance. Compare this balance to the balance listed in the annual financial report and investigate any differences. Optionally, request a confirmation of closing bank account balances for each account and compare these balances to those recorded in the financialreport.
10. For each checking account, obtain the year-end bank reconciliation and the bank statements for the last month of the year and the first month of the new fiscal year.Trace the "bank balance" from the reconciliation to the bank statement.
11. Trace any normal reconciling items such as deposits in transit or outstanding checks to the first bank statement of the new fiscal year, looking for any undue delays in clearing.
12. Investigate any unusual or non-recurring reconciling items, obtaining documentation oflegitimacy. If such items exist, examine prior months' reconciliations to see if the itemshave been carried forward from month to month.
13. Once reconciling items are verified, compare the "book balance" from the reconciliationto the balance in the accounting records as of the fiscal year-end and to the balance reported in the annual financial reports.
14. Count the petty cash fund and determine that the fund is intact.
15. Choose one prior reimbursement of the fund and examine the documentation in orderto establish the validity of items and amounts expended from the fund.

Cash Payments

1. Obtain a list of all bank accounts used to make payments and a list of persons authorizedto sign checks or make withdrawals for each account. Compare the list to that from prioryears and verify the authorized check signers with the church governing body.
2. Obtain the cash disbursements journal or other listing of all disbursements for the yearand choose a sample of disbursements for examination.
3. For each item chosen, obtain all supporting documentation and the canceled check.
4. Examine supporting documents for evidence that the item is a legitimate obligation ofthe church, and for evidence of approval for payment.
5. Examine the canceled check noting the authorized signature and the payee, anddetermine that the endorsement is consistent with the payee.
6. Determine the appropriate account to be charged for each item and trace each item toan entry in the accounting records to determine that the correct account was charged. Scan the numerical sequence of checks issued during the year. Investigate any missingnumbers.
7. Examine all checks listed as "Void" in the checkbook or disbursements journal.
8. Scan cancelled checks for irregularities (i.e. second endorsements).
9. Investigate and ensure financial statements reflect long-term commitments such asleases and contingencies such as lawsuits.

Payroll

1. Choose one or more employees and compare actual rates of pay with authorized ratesfrom the church governing body.
2. Examine withholdings and deductions from pay checks of chosen individuals andexamine documents authorizing any voluntary deductions.
3. Examine payroll tax returns and compare amounts reported thereon for one or moreemployees to the amounts reported on the employee's T-4 form. Investigate any discrepancies.

Investments

1. Obtain copies of the church's approved investment policy, investment statements, and acopy of the minutes from investment committee meetings.
2. Verify that the balances on the investment statements match those recorded in theaccounting records and the balance reported in the annual financial reports.
3. For one or more transactions chosen, analyze the investment to ensure that it meets thecriteria of the investment policy that the decision to buy or sell the investment was appropriately documented within the minutes and that the transaction was authorized appropriately.
4. For one or more transaction chosen, trace the correct recording of capital and interest inthe accounting records.

Property, Insurance and Miscellaneous

1. Obtain a master list of all real and personal property owned by the church and compareto last year. Determine that any additions or disposals were properly authorized.

2. For any new items on the list, examine the items to determine that they are present.Spot check older items to be certain they are present.
3. Examine current insurance policies for dates and amounts to determine that adequatecoverage exists.
4. Obtain year-end statements for any mortgages or loans and determine the correct year-end balance. Trace this amount to the annual financial report.
5. Determine for all mortgages and loans that payments are up to date.

Prepared By: T. C. S. Lever, Jr, Treasurer, Catawba Presbytery

DISCUSSION, DIALOGUE AND DISCERNMENT*

1. How comfortable are you engaging conversations about financial procedures on a scale of 1 to 10, with 1 being "not at all comfortable" and 10 being "very comfortable"?

2. For those self-scoring as less comfortable (on the lower end of the scale), what are ways you might delegate this to others? What level of engagement is needed from you to be a good steward of this conversation?

3. For those self-scoring as more comfortable (on the higher end of the scale), what are ways you might help the congregation own this work themselves rather than rely upon you to do it? What level of restraint is needed from you to empower the congregation?

Appendix F:

HR Best Practices 101[25]*

*Appendices D through F are provided as templates an interim pastor may use as resources, if they find the resources helpful. It is recognized there is a wide, diverse, broad, and variegated level of experience and expertise among pastors in the areas of finance and administration, as these are not core curriculum in seminary. However, ensuring a stable fiscal and administrative foundation is in place for the next pastor is a gift the interim pastor can pay forward to their colleague.

*****

There is an old joke that says, "This job would be easy were it not for the people," which is why God created personnel committees. Whether your church calls those who serve the Personnel, Administration, or Human Resources Committee, the work is the same and its purpose is,

> to ensure all legal and ecclesiastical statutes are complied with,
> to establish policies and procedures for fair and equitable employment, and
> to guide, support, and facilitate a healthy work environment that leads to effective ministry.

In order to fulfill its purpose, personnel committees craft written documents for Session approval and implement Session established, human resources best practices. Personnel policy guidelines are listed below, or you can contact the presbytery office for sample personnel policy templates your church can adapt for its use. In general, a good personnel policy will outline the following:

Employment

The Personnel policy should outline employment practices for hiring and firing that define exempt vs. non-exempt categories, full vs. part-time, and that comply with all EEO, immigration, ADA, and *Book of Order* provisions. Session is responsible for employment and termination of all lay employees as well as temporary pastoral positions. The congregation, in consultation with the presbytery, is responsible for all permanent pastoral positions.

Benefits

The personnel policy should review the benefits offered by the church, including (1) any medical insurance or retirement savings programs offered, (2) vacation and holidays, (3) how sick leave, personal time off, and family leave are accrued, and (4) how evaluations are conducted and by whom. Additional categories may be added, including conflict of interest, alcohol and drug use, sexual misconduct prevention, weapons in the workplace, allowance of flex-time, and/or sabbaticals.

Job Descriptions

The personnel policy should require job descriptions for all paid positions that specify the job title, position's purpose, accountability, and responsibilities and that briefly describe how the person is expected to relate to others in the church (i.e. other staff, Session, and congregation) as well as how the person will be evaluated. Emphasis when creating a job description should be on writing clear and concise statements that describe observable actions using active verbs!

Annual Review

An annual review process should be required and include both performance evaluations and adequacy of compensation.

Performance Evaluations

Performance evaluation for staff are for the purpose of guiding professional development and/or realigning staff conduct toward more effective service. Therefore, evaluations should seek to avoid a punitive tone in favor of coaching, guidance, and clarity of what is expected. The staff person should have input into the evaluation so that it is a two-way conversation. Ordinarily, performance evaluations are conducted by the head of staff or the staff person's direct supervisor. Personnel committee members may be asked to participate in the gathering of input for staff evaluations, although this is not a universal practice in churches. All evaluations should be filed with the Clerk of Session for the employee's confidential file.

Performance evaluation for pastor: It is recommended that Session's read Jill Hudson's *When Better Isn't Enough: Evaluation Tools for the 21st Century* (Alban Books, 2004), which suggests pastor-specific model for performance evaluation.

Compensation

Adequacy of compensation for staff: Compensation for all lay staff is approved by the Session and should be commensurate with comparable positions in the local economy.

Adequacy of compensation for ministers: Compensation for permanent pastoral positions is set by the congregation, while compensation for temporary pastoral positions is set by the Session. Presbytery sets the minimum terms of call for effective salary, which is currently set at $52,000 per year for a full-time position. "Effective salary" is generally defined as the sum of cash salary + housing, though see the next page for a complete definition of a pastor's terms of call and preferred ways to tax-advantage the terms of call.

As part of the terms of call, ministers are allowed a housing allowance that is tax-exempt. The housing allowance includes one's mortgage or rental costs, housing related fees (e.g. title search, HOA, etc.), repairs and upgrades, and the costs of living in the home such as utilities, furnishings, yard costs but excluding food and domestic services. "The responsibility for accurate estimates of the housing allowance and payment of applicable taxes rests solely with the employee" (*Guidelines for Session Personnel Committees,* page 10). All Board of Pension and IRS requirements must be followed.

Complaints / Grievances

Complaints or grievances should be directed to the employee's direct supervisor or the head of staff, as applicable, understanding that "the personnel committee not interfere with the ongoing supervision that the head of staff provides…[working] in a supportive and counseling relationship with the head of staff and with other staff as needed." (*Guidelines, ibid.,* page 1.) Clarity about the role of the personnel committee when there is a complaint is essential to avoid the common occurrence of "triangling" in the church. The personnel committee should avoid allowing itself to be drawn into a triangle between the head of staff and employee as its primary concern is upholding the legal, policy and mission rubrics described below.

When a complaint is about the head of staff or cannot be solved in conversation with the head of staff, the employee has the right to formalize the complaint in writing to the personnel committee. As a first step, the committee should assess the grievance according to the following rubrics:

- Is the grievance a matter whose response is dictated by legal statutes (e.g. an accusation of harassment or bullying)?
- Is the grievance a matter related to Session policies and procedures?
- Is the grievance a matter related to Session defined mission, vision, objectives and goals?

If the answer to any of the above questions is yes, the personnel committee shall respond so that all employees abide by all legal statutes, Session approved policies and procedures, and Session approved mission, vision, objectives, and goals as appropriate. Grievances that allege transgression of legal statutes shall be referred to Session for action, and Session shall appoint an Investigative Committee per *Book of Order* procedures as outlined in the *Rules of Discipline*.

If the answer to all of the above questions is no, the personnel committee shall respond by coaching the employee on possible means to solve their own problem, with an emphasis on direct, open and healthy communication. The personnel committee may also respond by coaching the head of staff on ways to facilitate effective communication and management of the employee, while remaining careful to focus on process over content. (That is, focus attention on proper communication and decision-making rather than taking sides in a debate.)

The Personnel Ministry Team shall communicate their actions to the employee and to the head of staff, both in writing and in-person, and keep record of their action.

Discussion, Dialogue and Discernment

1. How comfortable are you engaging formal, personnel conversations on a scale of 1 to 10, with 1 being "not at all comfortable" and 10 being "very comfortable"?

2. For those self-scoring as less comfortable (on the lower end of the scale), in what areas do you need intentional growth and development? What level of engagement is needed from you to be a good steward of this conversation?

3. For those self-scoring as more comfortable (on the higher end of the scale), what are ways you might help the congregation own this work themselves rather than rely upon you to do it? What level of restraint is needed from you to empower the congregation?

Appendix G: Sample Interim Contract

TRANSITIONAL PASTOR CONTRACT

SAMPLE-PCUSA

This agreement sets forth the basis for a working relationship between the Rev.__________________ as Transitional Pastor and head of staff and the Session of the __________________________Church, in ______________________ in cooperation with the ______________________Presbytery. This contract is for a period of one year beginning _____________________, unless terminated sooner as provided below.

I. **Shared Goals for the Well-being of ________________________ Church.**

The parties enter into the agreement with the following objectives and goals:

1. To work together to provide for the spiritual growth and the ongoing mission and work of the church.

2. To work together through the generally recognized developmental tasks of an interim period, as summarized by the following five focus points:

   a. Heritage: Recognizing and naming our history and finding meaning in it.

   b. Mission: Who are we (now)? Who are our neighbors (now)? What is God calling this congregation to do (now)?

   c. Connections: Including denominational, geographic and technological connections.

   d. Leadership: Reviewing the membership needs and ways of organizing and developing new and effective leadership within the congregation.

   e. Future: Naming a possible future for the congregation.

3. To work together to prepare the congregation to receive a new installed pastor, using the transitional time to assess the future journey of the congregation, to focus on what might need to be changed, and to lead and support the congregation in fulfilling the five focus points.

II. Expectations of the Transitional Pastor

During the term of this agreement, the Transitional Pastor will:

1. Function as Head of Staff, supervising church employees (including the lay pastor, program staff, music staff, administrative and office staff), and provide organizational oversight for the work of the church.

2. Serve as moderator for meetings of the Session and the congregation.

3. Work collegially with the Session in program planning.

4. Lead the Session and the congregation in working on the generally recognized five focus points of transitional ministry (as set for the above).

5. Coach and support the church's mission study as the church prepares to seek a new senior pastor/head of staff.

6. Meet regularly with colleagues in ministry.

7. Submit needed reports to the Committee on Ministry of the Presbytery.

8. Comply with the Sexual Misconduct Prevention Training requirements as set by the Presbytery.

9. Abide by the Sexual Misconduct Policy and the Code of Ethics of the Presbytery.

III. Expectations of the Session

During the term of this agreement, the Session will:

1. Recognize the importance of the transitional period and provide appropriate compensation to the Transitional Pastor.

2. Work cooperatively and creatively with the Transitional Pastor and the Presbytery to support the work of being a church in a time of significant cultural an denominational transitions.

3. Negotiate with the Transitional Pastor for time away to fulfill committee or board responsibilities to the larger church, including ____.

4. Review this contract with the Transitional Pastor for renewal by not fewer than sixty (60) days prior to the end of the contract. The contract is renewable yearly with the consent of the Transitional Pastor, the Session and the Presbytery until an installed pastor has been called.

IV. Expectations of the Presbytery

During the term of the agreement, the ____________________Presbytery will:

1. Provide support and consultative services to the Transitional Pastor and the Session (including vacancy consultation for the Pastor Nominating Committee) through the Presbytery's staff and the Committee on Ministry (COM).

2. Will assist the Session and the Transitional Pastor in addressing emerging needs through the resources of the Presbytery.

3. Will respond to any referrals by the Session and/or Transitional Pastor regarding the involvement of any former pastors of the congregation. It is understood that should the Transitional Pastor have conflict with any former pastor of the congregation, the matter will be referred to the Presbytery's COM.

V. Reporting and Accountability

The Transitional Pastor is accountable to the Presbytery COM and to the Session of _______________Church. The Session may appoint a committee to assist in this accountability process, and any review will include consideration of the partnership relationship between the Transitional Pastor and the Session.

VI. Annual Compensation and Benefits

During the term of this agreement, the Transitional Pastor shall receive the following compensation and benefits:

1. Salary and Housing:

   Salary:

   Housing:

2. Pension, medical and dental insurance: ______________________Church will provide pension and major medical insurance through the PC(USA) Board of Pensions as well as dental insurance.

3. Professional Expenses:

   Reimbursable Professional Expense:

   Automobile Expenses:

   Continuing Education:

4. Other benefits:

   a. Sick leave/personal leave: Ten (10) days each year, cumulative up to 120 days, to be used in case of illness. Sick leave shall be reported to Session and accounted for by the Personnel Committee. When employment terminates, no accrued sick leave will be paid.

   b. Study leave: Two (2) weeks study leave annually, to be taken within the year, and may be accumulated for up to 3 years (time and budget) with the timing and subject to be determined in the consultation with the Session.

   c. Vacation: Four weeks (1 month) annually, to be scheduled in consultation with the Session. Vacation shall accrue at the rate of one week per quarter, or as otherwise provided by law.

   d. Medically certified disability leave: A pastor who is certified by a licensed physician as temporarily disabled and who is not covered by a required state disability plan shall receive full salary and benefits for a period of such disability not to exceed ninety (90) days, at which time, if disability continues, application be made for disability benefits from the Board of Pensions. This policy shall apply to all medically certified disabilities, including pregnancy-related disability.

   e. Work week: The Transitional Pastor shall have one scheduled day off per week plus Saturdays as available. A regularly scheduled day off will be coordinated with the approval of Session and the Ministry of Human Resources.

   f. Long weekends: The Transitional Pastor will be granted three weekends (Sat/Sun.) off per calendar year (no more than one per quarter). These shall be scheduled in consultation with the Session.

g. Holidays: The following paid holidays will be observed: January 1, Martin Luther King's Day, President's Day, the Monday following Easer, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day. When a holiday falls on a regular day off, the Transitional Pastor may schedule another day off as a substitute.

VII. Termination Provisions

1. The Transitional Pastor may terminate this agreement prior to its termination date upon sixty days written notice to the Session.

2. The Session, with the consent of the COM, may terminate this agreement prior to its termination date upon sixty days written notice to the Transitional Pastor. The Session's failure to negotiate an extension of this agreement prior to sixty days from its expiration shall be considered notice of termination.

3. All vacation time and funds earned but not used during the contracted period shall be paid in full as the work terminates. Unused continuing education/study leave time and funds shall not be paid.

4. If this agreement is terminated by the Session, and the Transitional Pastor does not have a paid, full-time position at the termination of the contract, Church will continue the salary, housing allowance, and pension/medical payments for the Transitional Pastor for a period not to exceed 60 days after the contract termination date or until such time as the Transitional Pastor secures a new position, whichever comes first.

In witness whereof the parties have executed this Agreement on the dates set forth opposite their signatures:

Transitional Pastor: ____ Date: __________________________

Print Name: _____________________________________ Print Title: _________________________________

Clerk of Session: ____ Date: __________________________

Presbytery: ____ Date: ___________________________

Endnotes

[1] The following brief overview was provided to me by the Rev. Paul Soderquist, a professional interim pastor, who originally prepared the overview for the Presbytery of Grand Canyon's Commission on Ministry.

[2] Alan G. Gripe. *The Interim Pastor's Manual.* rev. ed. Louisville, KY: Geneva Press, 1997.

[3] Mead, Loren, *Critical Moment of Ministry: A Change of Pastors*, (Washington, D.C.: Alban Institute, 1986).

[4] Tasks express the "old" and "new" language / terms used for these concepts in transitional / interim training.

[5] Bendroth, Norman (editor), *Transitional Ministry Today.* (Lanham, MD: Rowman Littlefield), 2015, see especially the first two chapters.

[6] Terry Foland, IBT Vol. 9, No. 1, page 3, September 1996.

[7] Mead, ibid.

[8] Roberta Gilbert, *The Eight Concepts*, (Leading Systems Press: Front Royal, VA), 2006.

[9] Frederick Buechner, *Wishful Thinking: A Seeker's ABC* (New York: HarperCollins), 1973.

[10] Presbytery of National Capital, www.thepresbytery.org. Accessed May 23, 2018.

[11] Inspired by WayMakers, "What is Prayerwalking?" www.waymakers.org/prayerwalking.html.

[12] See https://missioninsite.com/ for more information.

[13] Frederick Buechner, *Wishful Thinking: A Seeker's ABC* (New York: HarperCollins, 1973), 118.

[14] This tool has been adapted from the *Commission on Ministry Handbook* of the Presbytery of Genesee Valley.

[15] Tom Fishburne, *Brand Camp*. SkyDeck Cartoons, 2007.

[16] Heifetz, Ronald. *The Nature of Adaptive Leadership*. www.youttube.com. Accessed July 9, 2019. https://www.youtube.com/watch?v=QfLLDvn0pI8.

[17] Russell Crabtree, *Penguins in the Pews: Climate, Change, and Church Growth*. (Magi Press: Hendersonville, NC, 2017), 53.

[18] Ibid. The other indicators are "high energy" and "clarity of vision." Many mainline congregations have one or another or both of these two indicators. Unfortunately, even these congregations often struggle with adaptation: Change?!

[19] Joseph Grenny and Kerry Patterson, *Influencer: The New Science of Leading Change* (Columbus, OH: McGraw Hill, 2013).

[20] Gilbert, ibid..

[21] This overview draws from two of Friedman's works: *Generation to Generation: Family Process in Church and Synagogue* (New York: Guilford Press, 1985) and *A Failure of Nerve: Leadership in the Age of the Quick Fix* (New York: Seabury, 1997).

[22] When the future seems uncertain, it always helps to know your options. Rev. Dana Lindsley, Former Executive Presbyter of the Presbytery of New England, created a great list of options for churches who are on the edge of viability. Rev. Sara Dingman edited the list to fit Missouri River Valley Presbytery. Corey Schlosser-Hall edited the list further for the Presbytery of Northwest Coast, and the Presbyterian Foundation had a separate yet similar version that was folded into this document. Now the presbyteries of Grand Canyon and de Cristo carry their ideas into these conversations, giving thanks for this great cloud of witnesses.

[23] Financial Best Practices was developed for the Presbytery of Grand Canyon by its treasurer, Paul Rooker, and finance manager, Paul Frieling.

[24] The Guidelines were developed for Catawba Presbytery by its treasurer, T. C. S. Lever, Jr.

[25] HR Best Practices was developed for the Presbytery of Grand Canyon and Presbytery de Cristo by Molly Winkler, a ruling elder and department head of HR for the Banner Medical System in Phoenix, Arizona.