A LEADERSHIP PROFILE OF THE SUCCESSFUL

TRANSITIONAL PASTOR: A DELPHI STUDY

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A Dissertation

Presented to

the Faculty of

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by

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APPROVAL SHEET

A LEADERSHIP PROFILE OF THE SUCCESSFUL

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To Katherine, Judah, Sophia, Liam, and Ezra—

my greatest beauty, my little lion, my wise lady, my brave knight, and my strong help.

You are the best part of my earthly life.

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PREFACE

Twelve years ago, I found myself at one of many seams that God has placed in my life. In this season I entertained the idea of pursuing a Ph.D. The dream quickly died with the necessity of learning French and German in addition to biblical Greek and Hebrew. Even upon completion of seminary, I did not consider continuing academic pursuits, as I believed that God had firmly shut this door.

Four years later my pastor, Sammy, called me into his office and broached the idea of pursuing more schooling. He explained that this opportunity had been graciously extended to him, and now he and the church would afford this opportunity to me. I was doubtful, but decided to go home and ask my wife, who would affirm my suspicions. She surprised me telling me, "You were made for this." Yet I doubted: how would it be funded? Where would I carve time out of an already full schedule? Would school hurt my marriage or take away from my relationship with our four young children? I was scared. So I wrestled for six months. I heard too many sermons that always ended with God asking, "Am I not able? Will I not be faithful? Am I not enough?" Then finally during a timely conversation on the way to the airport with Dr. Danny Akin, I discovered two things: (1) I wanted to do my Ph.D. and (2) there are Ph.D. programs where the student does not have to move or learn French or German. So, I applied. God was more than able. He provided the finances, the time, the energy, the protection, and the passion for the pursuit. God's grace always follows His calling.

God used many in instrumental ways along this journey, and I would be remiss not to give thanks. First, I want to thank my parents, who tried hard to instill two things into me, a love for Jesus and a love for learning. Mom, you are and will always be my

Greek, the ground-floor apartment in Atlanta, dates at Rural King in Benton, Illinois, and hours of tireless proofreading, encouragement, and support. "He who finds a wife finds a good thing and obtains favor from the Lord." God has granted me much favor in this life, but you are by far the most precious thing He has given me! I love you more than I did then. I love you VMM.

Last, I want to praise my Lord. The notecard taped to my desk states:

Ph.D.	12/13/13
Grow my walk with you - depth and knowledge	
Protect and bless my family - give me back my time	2/24/14
Help me do my best – I want to honor You	
Give me favor - give me peace	
Stress on the vine = best fruit	10/29/14
Stress is time, His grace will be sufficient 2 Cor. 9:8	

He is enough!

Michael Kramer

Benton, Illinois

May 2018

CHAPTER 1

TRANSITIONAL LEADERSHIP

The implementation of successful pastoral transition plans is a great need for the church today. Arguably, even more important than a plan is the character and profile of the leader who gives vision and guidance to a transition plan. John Ortberg notes the importance of leadership in his insightful forward for *Next Pastoral Succession that Works.* He states, "The stress, challenge, and importance of leadership in churches has never been higher (they have become more complex and ever-changing places to lead, in increasingly more challenging contexts)."[1] A transition plan by itself is merely an entrance ramp to the multilane highway of pastoral transition. Once a transition plan begins to accelerate, it is up to the visionary leader and those he or she empowers to keep the transition plan from derailing. Sadly, many well-intentioned pastoral transitions end up on the side of the road, either stalled or in flames, leaving the church with the collateral damage. This dissertation moves past what leaders should *do* in the midst of transition to explore the make-up of who transitional leaders should *be*, their traits and profile, in order to greater ensure the success of their pastoral transition. Character qualities such as secure, humble, encourager, and wise, are all reflected in the profile of a successful transitional leader. Chapter 2 of this research surveys the current conversation and gleaned the traits that are being discussed while chapter 3 synthesizes these traits and ultimately offers twenty-seven characteristics that make up a successful transitional leader.

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[1]William Vanderbloemen and Warren Bird, *Next: Pastoral Succession That Works* (Grand Rapids: Baker, 2014), 7.

Research Concern

The retirement of baby-boomers has created a season of transition in the current leadership culture in North America. As a researcher and representative of the Baby Boomer demographic, George Barna comments, "We love power. Whether it is because of an unhealthy desire for control, a reasonable concern about maintaining quality, a sense of exhilaration received from making pressure-packed, life-changing decisions or due to other motivations, Boomers revel in power. The sad result is that most Boomers – even those in the pastorate or in voluntary, lay-leadership positions in churches – have no intention of . . . handing the baton to Baby Busters."[2]

The challenges of leadership transition, while not unique to this season alone, are magnified by current demographic trends and impact both secular and sacred organizations. Weese and Crabtree, authors of *Elephant in the Boardroom*, spoke to the shortage of leadership over a decade ago. They stated, "In general, we live in an environment of significant leadership shortages in both secular and religious institutions."[3] Vanderbloemen and Bird, in their insightful book, *Next*, continue this line of thought specifically with pastoral transitions in view. They state,

> Consider these numbers about pastoral succession among US Protestants. The average senior pastor plans to retire from full-time active ministry at age 65. Among senior pastors of megachurches (weekly worship attendance of 2,000 or more adults, youth and children) according to Leadership Network research, 1 in 5 (22%) are founders and 4 in 5 (78%) are successors. Founders have served on average 19 years and are age 53; successors have served 14 years and are age 52.[4]

[2]George Barna, "Gracefully Passing the Baton," *Perspectives*, December 7, 2009, accessed May 6, 2016, http://fourpercent.blogspot.com/2009/12/gracefully-passing-baton-by-george.html.

[3]Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions* (San Francisco: Jossey-Bass, 2004), 136. They continue,
> Consider these trends: In 2003, the Presbyterian Church had 1602 churches trying to hire pastors and 1,290 ministers looking for jobs. A large number of pastors are now leaving the ministry because they retire or because they quit. In the Methodist Church, the number of people entering the ministry between 1981 and 2000 has decreased by 39 percent. Twenty-seven percent of U.S. Roman Catholic parishes do not have a priest. Churches large and small often have to wait two to three years to find a pastor or associate pastor. Ibid.

[4]Vanderbloemen and Bird, *Next,* 22.

While these leadership statistics are impressive, the topic of pastoral transition is a part of fairly new conversation. Baby-boomers, mega-churches, and denominations in transition have all set the stage for the transition conversation to take hold. In short, the North American church has not had to think deeply about the nature of transitional leadership until the unfolding of recent cultural developments focused our attention to a potential blindspot in church leadership practices and development. Vanderbloemen writes, "For all the talk in churches about vision, there is an unmistakable blind spot in churches large and small: succession isn't being discussed enough, and when it is, church leaders often lack wisdom in identifying the questions to ask or in what order to tackle them"[5]

In a similar vein, Tichy, in his book *Succession,* speaking to the importance of leadership transition from a secular standpoint states, "Every company or organization on the planet, whether run for profit, not-for-profit, public or private, family or shareholder owned, there are two immutable facts about leadership: 1. Leadership matters. 2. Continuity of leadership matters."[6] Ciampa and Dotlich write, "A *Fortune* article in February 2012 estimated that 40 percent of executives who are hired into a job from outside or are promoted fail within the first 18 months . . . the article notes that the failure rate has 'stood at about 40% for at least fifteen years.'"[7] Furthering this conversation,

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[5]Vanderbloemen and Bird, *Next,* 22.

[6]Noel M. Tichy, *Succession: Mastering the Make-or-Break Process of Leadership Transition* (New York: Portfolio, 2014), 20. Tichy notes,
> I would estimate as high a percentage as 80 percent of Fortune 500 companies and an equivalent percentage of academic and other nonprofit institutions – do have formal succession plans in place, but that is not really my point. Because in my experience all too often these formal plans are no more than that—empty formalities, technicalities, and charade like check-the-box exercises. When push comes to shove, as it nearly always does, such plans and processes ostensibly designed to ensure an orderly, seamless, nondisruptive CEO succession, absent political infighting, cultural confusion, ambiguity, and ambivalence, often break down in practice. Ibid., 22.

[7]Dan Ciampa and David L. Dotlich, *Transitions at the Top: What Organizations Must Do to Make Sure New Leaders Succeed* (Hoboken, NJ: Jossey-Bass, 2015), 4.

Stoddard and Wycoff record that leadership departures result in a minimum loss in the United States of $14 billion each year.[8]

Financial loss is not the only impact of failed leadership transitions. While the secular arena looks to profit margins and shareholders' happiness; the sacred arena champions life change and ministry impact. As Ed Stetzer laments, "Why do some leaders end so well – Calvin Miller, Jack Hayford, Bob Russell, Roy Fish and so many more – while others go out not in a blaze of glory, but in a blaze of gory? They finish poorly and leave a mess in their wake. In some cases, they even undo some of the tremendous progress God used them to create in years prior."[9] Marshall Goldsmith, quoting his mentor Frances Hesselbein, notes, "'Successful transition is the last act of a great leader.' Far too many leaders . . . just cannot let go."[10] It is hard to put a price tag on failed transition, yet all will face transition. The current leadership landscape calls for an imaginative conversation regarding leadership transition, specifically the need for a transitional leadership theory and a workable profile of a transitional leader. While succession is the last and greatest act, it is also an act that must be prepared for; a leadership style that must be developed, built out, and embraced.

A Gap in the Current Conversation

In *Next*, arguably the most definitive writing to date on pastoral transition, Vanderbloemen and Bird state their desire to explore the "hows," "whens," and "whys"

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[8]N. Stoddard and C. Wycoff, "Pick a CEO Who Truly Fits the Company," *Forbes*, April 9, 2009, accessed May 6, 2016, http://www.forbes.com/2009/04/09/ceo-succession-planning-leadership-governance-fit.html.

[9]Ed Stetzer, "Making Leadership Transitions Work," Churchleaders.com, January 8, 2013, accessed May 6, 2016, http://www.churchleaders.com/pastors/videos-for-pastors/164597-phil-cooke-making-leadership-transition-work.html.

[10]Marshall Goldsmith, *Succession: Are You Ready* (Boston: Jossey-Bass, 2009), xi.

of pastoral succession.[11] The authors write in their preface,

> To plan is wise, even in cases where succession seems far away or unnecessary. Mark Driscoll founded Mars Hill Church in Seattle at age twenty-five, and he says he'd love to remain pastor there until age seventy-five. 'If that's the case, then I get to think really long term about what I'm doing,' he says. 'When you plan on staying in one place for a long time, you tend to view the job differently.' But while Mark is preparing for a transition far down the road, he's also planned for a sudden change of circumstance (an emergency succession) should an unforeseen situation arise.[12]

The irony is thick. Within the same year this preface was penned (October 2014), Driscoll, who Vanderbloemen reveals was thinking of both transition down the road and an emergency succession plan, submitted his resignation. The "*sudden change of circumstance*" had arrived. No transition materialized. Yes, the challenges that Mars Hill faced were complex and multivariate, but there was a succession plan. Or at least it was talked about and shortly after applied, yet it failed. Mars Hill no longer exists. Mark Woods, of *Christianity Today*, describes well the outcome of Driscoll's presupposed emergency succession plan.   Woods writes, "The timeline of the fall of his ministry reads like a description of a slow-motion car crash."[13] A similar leadership debacle transpired when The Journey, a mega church in St. Louis, which released its founding pastor Darrin Patrick. The list of failed transitions, many of which had succession plans is long.[14]

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[11]Vanderbloemen and Bird, *Next,* 7.

[12]Ibid., 15.

[13]Mark Woods, "Decline and Fall: The Slow Erosion of Mars Hill," *Christianity Today*, November 4, 2014, accessed October 2, 2015, https://www.christiantoday.com/article/decline.and.fall.the.slow.erosion.of.mars.hill/42568.htm.

[14]Kate Shellnutt, "Darrin Patrick Removed from Acts 29 Megachurch for 'Historical Pattern of Sin,'" *Christianity Today*, April 4, 2016, accessed May 5, 2016, http://www.christianitytoday.com/news/2016/april/darrin-patrick-removed-acts-29-megachurch-journey.html, observes,
> Patrick joins several other prominent evangelical leaders who CT noted left office for reasons outside of financial or sexual impropriety. John Piper took leave from his church in 2010, citing his need for "a reality check from the Holy Spirit." The following year, Sovereign Grace ministries president C. J. Mahaney stepped down due to "various expressions of pride, unentreatability, deceit, sinful judgment and hypocrisy." Mars Hill pastor Mark Driscoll resigned in 2014, after his church found him guilty of arrogance and domineering leadership. Patrick was part of the Acts 29 board that removed Driscoll, its founder, from leadership and membership.

Sadly, failed pastoral succession plans are not simply relegated to emergency succession plans brought on by crisis. One of the first mega-church pastoral transitions, the attempted succession of W. A. Criswell, long-time pastor of First Baptist Dallas, to his handpicked successor, Joel Gregory, failed. Why do well laid-out and communicated transition plans fail? If having a transition plan is the "front door" of a pastoral succession plan, then what is "the back door?" Vanderbloemen points to an emergency succession plan as "the key" to succession, yet it would seem from the preface of *Next,* that Driscoll was prepared for an emergency succession. Other leaders have espoused well laid-out succession plans only to watch them fail. Vanderbloemen begins the much-needed conversation revolving around the need for succession planning, the issues that pastors and leadership boards face, and suggestions for successful transition. Vanderbloemen focuses well on what a leader should do.[15] But as Driscoll, W. A. Criswell, and a host of other very gifted and skilled leaders who have failed, struggled, or been unprepared to implement transition plans reveal, it is important to ascertain who a transitional leader must become in order to guide a successful transition.[16]

**The Need of the Right Traits for a
Successful Transitional Leader**

Robert Hargrove in *Masterful Coaching* writes, "In most cases in our society, people don't ask the question: 'How do I be?' when it comes to learning. They think in terms of 'What do I do?' and 'How do I do it?' This makes sense in teaching simple skills or practices, but it becomes limited when we try to apply the same principle to

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[15]This dissertation, building on the work of Vanderbloemen and others, moved beyond what a successful transitional leader should do, to who they should be. This research offered that leaders should be kingdom-focused, willing to follow, team players, and disciple makers.

[16]Other churches, such as those led by Robert Schuller, Adrian Rodgers, Rob Bell, Ted Haggard, C. J. Mahaney, and John Piper, have faced unexpected or short notice successions or transitional seasons.

learning certain roles, such as leadership or coaching."[17] No one would argue the complexity of a leadership transition at the top of an organization. Transitional leadership has been discussed and researched but has yet to be studied in light of 'How should I be.' The current cultural context of Baby Boomers retiring and their struggle to relinquish power, and the fact that great leaders are never static or permanent, necessitates that leaders are always in seasons of transition and are moments away from succession. The hallmark of the best leaders is their legacy, which creates the imperative for a proposed transitional leadership theory and a transitional leadership profile. Jay Passavant in *Seamless Succession* quotes Mike Myatt, who aptly states regarding leadership transition, "Succession needs to be part of the values, vision, strategy, and culture of an organization. . . . It must be viewed as a step forward and not a regression. . . . The truth is succession is a blending of the art and science of leadership, people, positions, philosophies, relationships, culture, and a certainty of execution."[18]

Limitations of Prior Research

Prior research in the area of pastoral transition has been limited for several reasons. First, there is little existing literature addressing pastoral transition. Second, the contextual need for transition in light of the advent of the mega-church is a relatively new phenomenon. Third, the nature of pastoral transition has many variables and is diverse in nature making it challenging to track empirically.

[17]Robert Hargrove, *Masterful Coaching* (San Francisco: Pfeiffer, 2008), 44.

[18]Mike Myatt, "The #1 Reason CEO Successions Fail," CEO.com, August 8, 2012, quoted in Jay Passavant and Jim Tomberlin, *Seamless Succession* (Camarillo, CA: Xulon, 2015), 45.

Limited Existing Literature

Vanderbloemen states,

To date very few full books are available on pastoral succession, but one of the best is . . . *The Elephant in the Boardroom.* Published ten years ago, the book rightly identified the elephant and significantly helped begin the conversation. Now it's time to go to a whole new level: creating church cultures where the conversation is normal and natural and supported by structures that develop leaders at every level.[19]

It should be noted that *The Elephant in the Boardroom* offers no other sources on pastoral transition, and there are no footnotes and limited citing of statistical data. Vanderbloemen offers a few helpful sources for further reading: nine books for church boards or search teams, six books from the marketplace, and three books for pastors.[20]

Passavant writes, "There are only a handful of other books available on this topic and fewer still written from the perspective of someone who has been through the experience."[21] *Planning Your Succession*, by Samuel Chand (2008), calls for the necessity of preparing an organization for the future succession. *Beginning Ministry Together,* by Oswald, Heath, and Heath (2003), addresses how congregations can weather the storm of

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[19]Vanderbloemen and Bird, *Next,* 30.

[20]Samuel R. Chand and Dale C. Bronner, *Planning Your Succession: Preparing for Your Future* (Highland Park, IL: Mall Publishing, 2008); Roy M. Oswald, James Heath, and Ann Heath, *Beginning Ministry Together: The Alban Handbook for Clergy Transitions* (Bethesda, MD: Rowman & Littlefield, 2003); Elizabeth Rice Achtemeier, *So You're Looking for a New Preacher: A Guide for Pulpit Nominating Committees* (Grand Rapids: Wm. B. Eerdmans, 1991), makes recommendations on what to look for in a preacher; Alan G. Gripe, *Interim Pastor's Manual,* rev. ed. (Louisville: Geneva, 1997), identifies five tasks of an interim pastor (especially for the Presbyterian Church USA); Loren B. Mead, *A Change of Pastors . . . and How It Affects Change in the Congregation* (Herndon, VA: Rowman & Littlefield, 2012), explores the interim time between pastors; Gregory Tyree, *Helping Your Church Discover Its Next Pastor: A Manual for Pastoral Search Committees* (Charleston, SC: CreateSpace Independent, 2013), explores the pastoral discovery process; Joseph L. Umidi, *Confirming the Pastoral Call: A Guide to Matching Candidates and Congregations* (Grand Rapids: Kregel, 2000), is a guide for matching candidates to congregations; John Vonhof, *The Alban Guide to Managing the Pastoral Search Process* (Bethesda, MD: Alban Institute, 1999), is a guide to the search process; Ralph C. Watkins, *Leading Your African American Church through Pastoral Transitions* (Valley Forge, PA: Judson, 2010), features ministry profiles based on interviews with pastors and churches that have navigated pastoral transitions; Edward A. White, *Saying Goodbye: A Time of Growth for Congregations and Pastors* (Savage, MD: Rowman & Littlefield, 1990), promotes pastoral transitions as growth experiences.

[21]Passavant and Tomberlin, *Seamless Succession*, 11.

transition, specifically saying good-bye, discerning future needs, and leveraging interim periods. *Transition Plan*, by Bob Russell (2010) tells the story of Southeast Christian Church while examining the reality of failed transitions. Other recent books such as *Passing the Leadership Baton*, by Tom Mullins (2015), share specific stories of leadership succession, while Jay Passavant's new work, *Seamless Success* (2015), looks at his own succession at North Way Christian Church and offers a road map to pastoral transition for churches seeking help in planning and implementation of transition.

From the academic world even less has been written in the last fifteen years focused specifically on the transitioning pastor.[22] Several dissertations have been written regarding the impact of pastoral transition on the church. Two dissertations worth mentioning that interact with *The Elephant in the Board Room* are May (2010) and McCready (2011). Gary May's work, *An Analysis of Selected Variables that Influence Postsuccession Performance in Southern Baptist Churches* (2010), focuses on Weese and Crabtree's call for a succession plan and studies pastors in the SBC called in 2003 and the factors from the decade surrounding their call (1998-2008).[23] Robert Collison McCready's work, *Relay Succession in the Senior Pastorate: A Multiple Case Study Method* (2011), also rises out of Weese and Crabtree's work.[24] This dissertation looks at a systematic

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[22]The scope of this dissertation covered the last fifteen years.

[23]Gary Royce May, "An Analysis of Selected Variables That Influence Postsuccession Performance in Southern Baptist Churches" (Ph.D. diss., The Southern Baptist Theological Seminary, 2010). May examines the relationship between pre-succession context of succession and the performance variables, successor origins, and post succession performance of the successor. While this is a helpful work, it draws from Weese and Crabtree's work and does not focus on the transitioning pastor, but more on the succession itself.

[24]Robert Collison McCready, "Relay Succession in the Senior Pastorate: A Multiple Case Study Method" (Ph.D. diss., The Southern Baptist Theological Seminary, 2011).

succession planning system and the principles of relay succession within the Church of God.[25]

The majority of resources are often directed toward the church and church leadership who are already in the midst of transition. It could be assumed from the standpoint of the intended audience that the outgoing pastor has little impact or responsibility when it comes to transition. *Next* and *The Elephant in the Board Room* are exceptions to the rule with the intended audience being pastors and leadership.[26]

Vanderbloemen makes a pivotal shift when he defines leadership succession by quoting Dave Travis, CEO of Leadership Network, "[Leadership succession] is the intentional process of the transfer of leadership, power, and authority from one directional leader to another."[27] Vanderbloemen adds, "Succession is when one senior leader intentionally transitions and hands over leadership to another."[28] It should be noted that *Transition Plan, Passing the Leadership Baton,* and *Seamless Succession*, also address pastors as well as anyone else that may have influence over the pastoral transition. Each of these books is written from the helpful but limited view of the specific transitions experienced by their authors. It seems that the conversation of church succession has shifted to focus on the pastor. Churches have been given a snap shot of what is at stake in regards to succession, pastors have been given road maps and

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[25]As with May's work, this work sheds little light on the characteristics or traits of who a pastor should be or even the influence that the exiting pastor can have on the transition process.

[26]Weese and Crabtree, *The Elephant in the Board Room,* xi-xii, stresses having a plan in place and (1) outlines the circumstances around transition, (2) identifies four church cultures in which transition occurs, and (3) offers various components of transition plans. Vanderbloemen and Bird, *Next*, 5-6, continues the conversation by (1) stressing the need for a transition plan, (2) mapping out issues pastors and boards will face in implementing a succession plan, and (3) guiding readers toward a successful transition by focusing on successors, money, the success of the future pastor, and thinking long term (the "hows," "whens," and "whys" of succession). Both of these books are written from the perspective of the church-consulting world.

[27]Vanderbloemen and Bird, *Next,* 10.

[28]Ibid.

challenged to develop succession plans, but little if any has been written on how a pastor can develop the traits and discipline to fit the profile of a successful transitioning leader.

Contextual Limitations

The discussion regarding pastoral transition is a conversation that is just now beginning to develop predominately in a North American context. Jim Tomberlin, founder of MultiSite Solutions, writes in the preface of *Seamless Succession*,

> The majority of churches today are led by aging baby-boomers. There is a tsunami of senior pastoral transitions coming over the next decade as these aging baby-boomers retire. Bill Hybels opened the door for public discussion of succession at Willow Creek's Leadership Summit in 2012. Then Warren Bird & William Vanderbloemen pushed the succession door wide-open in 2014 with their seminal book *Next: Pastoral Successions That Work*. Their well-researched and documentation of good, bad, and ugly pastoral transitions reinforced the need for road maps towards seamless successions.[29]

As Tomberlin notes, the retirement of Baby-Boomers has created an unique season in the current church landscape that is driving the conversation regarding pastoral transition. Historically, seminaries and denominations would fill vacant church pulpits with a steady stream of clergy. Within most denominations, transition was a conversation between denominational authorities and the churches.[30] Yet Weese and Crabtree (*Elephant in the Boardroom*), spoke to the shortage of leadership over a decade ago. "In general, we live in an environment of significant leadership shortages in both secular and religious institutions."[31]

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[29]Passavant and Tomberlin, *Seamless Succession*, 7.

[30]For example, a Presbyterian church that had a pastor retire or resign would look to their Presbytery to assign a pastor to their congregation. Other similar examples would be Methodist, Lutheran, and Episcopalian denominations. Therefore, the responsibility of transitioning leadership would fall to the denomination.

[31]Weese and Crabtree, *The Elephant in the Boardroom*, 136. Weese and Crabtree continue, Consider these trends: In 2003, the Presbyterian Church had 1602 churches trying to hire pastors and 1,290 ministers looking for jobs. A large number of pastors are now leaving the ministry because they retire or because they quit. In the Methodist Church, the number of people entering the ministry between 1981 and 2000 has decreased by 39 percent. Twenty-seven percent of U.S. Roman Catholic

Statistical Limitations

Statistically, research delving into the field of pastoral transition has been extremely limited. As mentioned afore, Weese and Crabtree (arguably the first voice in the conversation) had little data or sources to support their writing. Their writing flowed from their experience in consulting. In kind, Passavant, Mullins, and Russell bring great conversations to the table regarding their personal experiences and perspectives but provide little in the way of statistical analysis and empirical research.[32]

Next: *Pastoral Succession that Works* is the current definitive work on pastoral transition. Unlike its predecessor, *The Elephant in the Room*, *Next* (Vanderbloemen and Bird) offers a wide range of statistical data, yet nowhere does their book venture to offer a statistical success and failure rate of pastoral transitions. Pastoral transitions are hard to quantify for several reasons. First, and foremost, there is very little data on the success or failure of transitions.[33] Second, data from the perspective of the transitioning pastor would be hard to measure.[34] How would success or failure of transition be identified? There are many variables and many degrees of success or failure. Who would be in the position to make the definitive answer as to whether a church succeeded or failed to

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parishes do not have a priest. Churches large and small often have to wait two to three years to find a pastor or associate pastor.

[32]Passavant's website does make the claim that "church succession faces a daunting failure rate of 70% within the first 3 years." Jay Passavant, accessed October 3, 2015, seamlesssuccessionbook.com.

[33]Pastors who are successful go into the twilight. The succeeding pastor rightly looks to the future and at the most honors a past legacy. Search committees, boards, and people of influence move forward. Churches breathe a sigh of relief. Denominations are focused on roles, budgets, and viable churches. No one is tracking transitions outside of incidents where large churches falter or stumble in the wake of the changing of the guard, or a book is penned by a successfully transitioned senior pastor. It should be noted that pastors that do not succeed in transitioning have little opportunity to talk about or analyze their failure.

[34]It is worth noting that for research purposes, parameters of success could be defined. An example of this is found in Gary May's research, which chose specific parameters for "success" of pastoral transition. These parameters exceeded the scope of focusing primarily on the influence of the transitioning pastor on the success of a pastoral transition. May's excellent research targets on a larger time continuum versus isolating the impact of the transitioning pastor. See May, "An Analysis of Selected Variables."

transition properly? Third, as weight of responsibility slowly begins to shift from the church and church leadership toward the senior pastor, there are little if any tools to assess the ability or skill set of a senior pastor to be able to face transition. There is no transitional leadership profile that would allow for future systematic research or comparative analysis. In short, there are currently available road maps to weather succession but no transitional leadership profile that seeks to synthesize the current data in order to allow pastors to better equip and develop themselves for their future transitions.

Conclusion: A Void in the Research

In conclusion, greater attention needs to be given to the traits and characteristics of successful transitioning pastors. Specifically, research needs to be focused toward the development of the individual facing transitional leadership. This conversation is not for elder boards, people of influence, or the church at large; it is for their pastor who someday will face a transition which will have great impact on the church. Pastors must learn to be transitional leaders. Transitional leaders cannot merely implement transition plans (e.g., Driscoll, W.A. Criswell); they must have (or develop) the traits and discipline that make up a successful transitional leaders. Christian leadership is not just about what individuals implement but about who they are and what they become. Pastors who are developing themselves now to become transitional leaders will be much more likely to be successful in the midst of the unique transitions that they face. Every transition is unique in its own right, therefore wisdom would dictate focusing attention not on a spectrum of unique transitions but on the characteristics and qualities of the transitional leader. The profile of a successful transitioning pastor needs to be developed and the current best practices being offered need to be analyzed, synthesized, refined in light of this profile. The current lack of literature addressing transitional leadership, the unique context of increased pastoral transitions in the church world, and the statistical challenges that researchers face all set the stage for further study.

Trajectory of Study

This study sought to provide relevant research to prepare pastors to become excellent transitional leaders so that they will become greater stewards of their leadership roles while maximizing the kingdom potential of the church bodies in which these leaders serve. Over the last fifteen to twenty years the conversation regarding pastoral transition has been gradually developing.[35] The current conversation has addressed the pastor's responsibility or stewardship within pastoral transition (proclaiming) and provided snapshots of functional plans with their offered components (leading).[36] The questions that now need to be addressed are 'What does it take to be a transitional leader?' and 'How can one be prepared to be a successful transitioning pastor?' Current writing has focused on a transitional leaders need to proclaim (cast vision) and lead (methodologies) but little focus has been given to the personal development of the transitional leader's

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[35]For years, the responsibility of leader transitions in the church was primarily viewed as the job of local church or denominations. With the decline of denominations coinciding with the advent of the megachurch led by iconic pastoral personalities, the playing field of pastoral transition began to change. Beginning with the writing of *Elephant in the Board Room* in 2004, the idea of the need for pastoral responsibility in pastoral transition was born. Ten years later, the authors of *Next* continued the conversation of pastoral transition and convincingly argued for pastoral responsibility in leadership transition. Having demonstrated the need for pastors to be kingdom-minded and good stewards of their leadership transitions, the conversation began to address the functional plans or methodologies of successful transition plans. Books such as *Transition Plan*, *Passing the Leadership Baton*, *Seamless Succession*, and *Leader >< Shift*, offered case studies of failed (or troubled) and successful pastoral transitions while highlighting the stories of each author's successful transition plan.

[36]In pastoral succession, proclamation is the first step, which leads to the eventual leadership transition. Yet successful implementation of a transition plan requires being the right leader. The current conversation regarding pastoral transition has well highlighted two of the three aspects implemented by transitional pastors: proclaiming and empowering or methodologies and processes. While the current literature contains hints at what the traits of a successful transitioning leader, these traits have yet to be systematically identified. These traits, the convictions, character, and competencies of a successful transitional leader, once identified, would allow individuals to measure their current aptitude and seek to develop in identified areas of need. Embracing the traits that allow transitional leaders to be successful is important. Transitional leaders who proclaim the vision of transition and become the right transitional leader will ultimately be the best equipped to empower others toward a successful transition.

needed traits to be a successful transitional leader, specifically the convictions, character

qualities, and competencies of a transitional leader.[37]

Chapter 2 of this study surveys the current literature and draws out the

potential traits of successful transitioning pastors highlighted within the literature.[38]

Chapter 3 utilizes a Delphi study which empowered an expert panel to qualitatively

identify the characteristics and traits of a successful transitioning pastor. The remainder

of this study explores the findings and offers a comprehensive analysis of the data.

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[37]Leadership blind spots are magnified in the face of transition and change. Transitional leaders fail not because they have proclaimed a vision of transition and not because they have begun to implement methodologies. Many transitional leaders fail because they have not sufficiently developed into the transitional leader that they need to be to achieve success. It is not enough to proclaim the vision of pastoral transitions, nor is it sufficient to just implement methodologies and practices. A transitional leader must become the right leader for transitional success.

[38]It should be noted that these are "potential traits" and there are likely traits beyond those identified within the literature.

CHAPTER 2

LITERATURE REVIEW

All pastors will face transition. Recent literature has made a consistent call for every pastor to consider himself or herself an interim pastor who is given stewardship over a local body.[1] This stewardship includes responsibility to prepare the church body for the future under the direction of another leader. As noted in the previous chapter, current literature has addressed the great need to proclaim or cast vision for transition and then implement different methodologies toward transition, but there is an absence of direct discussion regarding the necessity of becoming a transitional leader. While there is no direct discussion of developing traits to become a transitional leader in the literature, these traits are indirectly discussed as the current writers examine both successful and unsuccessful transitions. This chapter, in addition to highlighting the lack of focused discussion in the literature surrounding who a transitional pastor must become, distills traits that are indirectly mentioned within the current discussion.

**The Need: The Nature of a Successful
Transitioning Pastor**

To date, the current literature has called pastors to proclaim or lead in pastoral transition. The current literature has also offered methodologies and examples of how others have led those around them to achieve successful pastoral transition. While both of these are necessary and important, the greater need from a stewardship, empowerment, and replicative perspective is to identify the specific traits—the convictions, character,

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[1]William Vanderbloemen and Warren Bird, *Next: Pastoral Succession That Works* (Grand Rapids: Baker, 2014).

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and competencies—of a successfully transitioning pastor. There needs to be a greater understanding of the traits that allow a pastor to be successful in the midst of a transition. Once identified, these traits can be honed and leveraged for kingdom gain. For the sake of clarity, transitional leadership in the literature is examined using three categorical lenses: transitional leadership through proclaiming, transitional leadership through becoming, and transitional leadership through empowering.[2] This chapter highlights that while the lenses of proclaiming and empowering are addressed by the current literature, the lens of becoming has been insufficiently addressed. Once reviewed, the literature is distilled and synthesized using tables for clarity. The desired outcome of the discussion is to discern the traits of a successful transitioning pastor that have been raised in the current literature. Through this process, the gap in the current literature—specifically the need for more in-depth research of who transitioning pastors should become—is underscored.

Three Levels of Transitional Leadership

From its outset, this research has hypothesize that strong transitional leaders must perform on three distinctive levels of leadership, and that a transitional leader's success or failure flows out of these three levels of leadership. The three levels of transitional leadership in view are: proclaiming or casting vision for transition, becoming or being the right leader for transition, and empowering others for transition. Of these three levels, the first (proclaiming a vision for transition) and the third (empowering others for transition) have been addressed by the literature. The area that the current

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[2]*Proclaiming* encompasses communicating and casting vision; *becoming* consists of the traits, convictions, character qualities, and competencies necessary to be a successful transitioning leader, and *empowering* consists of the actions taken during the transitional period to achieve a successful handoff to the incoming pastor.

literature, and therefore conversation, has not been intentionally focused on is becoming the right leader for a pastoral transition.[3]

In the last three years, since the writing of *Next* by Vanderbloemen and Bird, the conversation of church succession has shifted to focus on the pastor's influence in transition. The recent literature calls for pastors to consider their roles as transitional leaders and begin to talk about owning their transitions.[4] The current literature has given the church a snapshot of what is at stake in regards to succession and encourages pastors to initiate conversation about transition. Pastors have been given road maps from other practitioners and challenged to develop succession plans and, by application, communicate these transition plans. While talking about transition and best practice for transition have been written about, who a pastor must be to transition well has not received focused attention.[5]

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[3]The lack of focus on becoming the right leader may be in direct correlation to the lack of this conversation in the business world, but as a later discussion in this chapter will note, the business world is quite a different context from the church world, and the succession plan of the business world is overseen by the board of directors, with many CEOs being terminated or fired for poor performance (therefore they have little influence over their successor or the transition process).

[4]Two voices in the recent existing literature addressing pastoral transition, *The Elephant in the Boardroom* and *Next,* are exceptions to the rule, with the intended audience being pastors and leadership. These works call for pastors to have a transition plan and to communicate it: communication by proclaiming. Vanderbloemen and Bird make a pivotal shift in highlighting their intended audience when they define leadership succession by quoting Dave Travis, CEO of Leadership Network: "[Leadership Succession] is the intentional process of the transfer of leadership, power, and authority from one directional leader to another." Vanderbloemen and Bird, *Next*, 10. Vanderbloemen and Bird add, "Succession is when one senior leader intentionally transitions and hands over leadership to another." Ibid. It should be noted that *Transition Plan, Passing the Leadership Baton*, *Leader<>Shift*, and *Seamless Succession* also address pastors as well as anyone else who may have influence over the pastoral transition. In the last two years, the conversation of church succession has shifted to focus on the pastor.

[5]The topic of pastoral transition is a fairly new conversation. Baby boomers, megachurches, and denominations in transition have all set the stage for the transition conversation to take hold. Vanderbloemen and Bird, *Next,* 22, write, "For all the talk in churches about vision, there is an unmistakable blind spot in churches large and small: succession isn't being discussed enough, and when it is, church leaders often lack wisdom in identifying the questions to ask or in what order to tackle them." The current writing, directed toward pastors, focuses on the nature of the problem and offers best practices for navigating transition. Little attention has been given to the nature of transitional leadership development or the ideal profile of a transitional leader.

The void in the literature lies in developing who transitional leaders should become (i.e., humble leaders, willing followers, disciple makers) in order to be successful through a transition. Moving beyond the current transitional leadership literature which champions communication by proclaiming a vision, one must move to a deeper level of communication by becoming. In support of this line of thinking, Andy Stanley's book *Visioneering* is insightful. In *Visioneering*, Stanley unpacks the concept of moral authority. It is not merely what is verbally communicated that ensures success but "who" the communicator becomes. Stanley writes, "It is the alignment between a person's convictions and his behavior that makes his life persuasive. Herein is the key to sustained influence."[6] Stanley's point is vital. As examined in chapter one through the example of Driscoll, it is not enough to just say the right things; an individual must be the right leader and do the right things. It can easily be stated that within the act of leadership transition lies the utmost test of a leader's persuasive ability and sustained influence to lead a church toward a successor and a successful transition. Stanley astutely notes, "Leaders and influencers who are driven purely by a desire to be leaders and influencers rarely maintain their moral authority."[7] Stanley offers a recipe for developing moral authority: character, sacrifice, and time. If pastoral transitions are to be successful, all three elements must be present and practiced. Stanley notes, "As a visionary, the one thing you can control and must protect at all costs is your moral authority. Moral authority makes you a leader worth following. Moral authority positions you to influence people at the deepest level: heart, mind, and conscience . . . your moral authority will enable you to maintain your influence with those who feel

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[6]Andy Stanley, *Visioneering: God's Blueprint for Developing and Maintaining Vision* (Sisters, OR: Multnomah, 2005), 179. Here Stanley rips a page from Aristotle's playbook.

[7]Ibid., 183.

called to follow you."[8] Sadly, many able, talented, and charismatic leaders who communicate a transition plan falter when it comes to aligning their own character to what they are saying and doing. The tipping point, which moves a transitional leader from merely proclaiming vision to realizing a successful transition, lies in becoming the right transitional leader. Transitional leaders who communicate by both proclaiming vision of transition and becoming a transitional leader are well situated to apply the highest level of communication: communication by empowering others to engage in a successful leadership transition.

Review of Current Literature

This literature review accomplishes three main purposes. First, it gives an overview of the four literature streams found in both the current Christian and secular literature landscape which form the current conversation on pastoral transition. Second, this literature review synthesizes the main arguments and applications of each of the four literature streams. Third, the literature review distills what the current literature indirectly points to as the traits of a successful transitioning leader so these traits, and others, can be further analyzed and researched. Once these traits are identified and ratified by empirical research, transitioning pastors can focus on these traits to be more effectively developed into excellent transitional leaders and thereby maximize their stewardship and kingdom gain.

The Current Literature Landscape

The literature in the current conversation on pastoral transition can be divided into four distinctive streams. Within the first stream, two books have been seminal to the

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[8]Stanley, *Visioneering*, 180. Stanley continues, "All the ability, talent, and charisma in the world cannot take the place of moral authority." Ibid., 180-81. Stanley quotes Albert Schweitzer, who correctly states, "Example is not the main thing in influencing others, it is the only thing." Ibid., 177.

conversation surrounding pastoral transition. The first is *The Elephant in the Boardroom* by Weese and Crabtree.[9] The second is *Next* by Vanderbloemen and Bird.[10]

The second stream of literature arises from practitioners who have successfully transitioned their pastorates and then written about their experience. These pastors include Bob Russell (*Transition Plan*), Tom Mullins (*Passing the Leadership Baton*), Jay Passavant (*Seamless Succession*), and Gary Johnson (*Leader><Shift*). The third stream of literature arises from the academic world regarding both pastoral and leadership transition. Gary May's work, *An Analysis of Selected Variables that Influence Postsuccession Performance, in Southern Baptist Churches* (2010), and Robert McCready's work, *Relay Succession in the Senior Pastorate* (2011), both shed light on pastoral leadership and succession. A final stream of literature regarding leadership succession arises from the business world. Works such as *Succession: Are You Ready?* (Goldsmith), *Transitions at the Top* (Ciampa and Dotlich), *Succession* (Tichy), and published articles, such as "4 Tips for Successful Succession Planning" (Goldsmith), "Ending the CEO Succession Crisis" (Charan), and "Why CEOs Don't Get Fired as Often as They Used To" (Per-Ola Karlsson), while not looking directly at pastoral transition, examine the nature of a transitioning leader and therefore are valuable to this conversation.[11]

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[9]Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions* (San Francisco: Jossey-Bass, 2004).

[10]Vanderbloemen and Bird, *Next*.

[11]Tony Adams, *The Nonprofit Leadership Transition and Development Guide: Proven Paths for Leaders and Organizations* (San Francisco: Jossey-Bass, 2010); Dennis C. Carey and Dayton Ogden, *CEO Succession: A Window on How Boards Can Get It Right When Choosing a New Chief Executive* (New York: Oxford University Press, 2000); Marshall Goldsmith, *Succession: Are You Ready?* (Boston: Jossey-Bass, 2009); William J. Rothwell, *Effective Succession Planning: Ensuring Leadership Continuity and Building Talent from within* (New York: Amacom, 2010); Thomas J. Saporito and Paul Winum, *Inside CEO Succession: The Essential Guide to Leadership Transition* (Hoboken, NJ: Jossey-Bass, 2012);

<center>***The Elephant in the Boardroom* and *Next***</center>

From a high-level perspective, *The Elephant in the Boardroom* and *Next*,
written almost a decade apart, call for a conversation surrounding pastoral succession.
The Elephant in the Boardroom in many senses was a book before its time as it was one
of the first to acknowledge the importance of the pastor in pastoral succession. The
authors write, "This book calls us to imagine a transition process that fits the church of
today rather than the one of fifty years ago."[12] *Next* continues this conversation by taking
the thought of a pastor's impact and hones it to a call for pastors to engage in succession
planning.

The Elephant in the Boardroom (2004):
The Players, Cultures, and Components
 of Successful Transition

The Elephant in the Boardroom is one of the first voices addressing the issue
of pastoral succession. Pastoral succession planning has become important due to baby
boomers transitioning en masse and the American church's unique season of the
megachurch phenomenon. *The Elephant in the Boardroom* describes the players, culture,
and components of a pastoral transition.[13] This work stresses the need to talk about
transition and the book's intended audience are the perceived five key players in
transition: the departing pastor, the board, the transition consultant, the personnel
committee, and the arriving pastor.[14]

Harvard Business School Press, comp., *Harvard Business Review on CEO Succession* (Boston: Harvard
Business Press, 2009).

[12]Weese and Crabtree, *The Elephant in the Boardroom*, 6.

[13]In part 2 of *The Elephant in the Boardroom*, the authors offer four church cultures (or
contexts) for transition: Family, Icon, Archival, and Replicable. Exhibit 4.2 offers an excellent example of
each of these four church cultures. Ibid., 63.

[14]Compared to *Next*, *The Elephant in the Boardroom* offers light in the area of statistical
research as the authors relied heavily on their experience and perceptions. There is limited substantial
qualitative or quantitative research in *The Elephant in the Boardroom*, but the book does paint an accurate

Weese and Crabtree's first key player is the departing pastor. They call the exiting pastor to engage in four different ways. First, to recognize that every pastor is a departing pastor. Second, the departing pastor should participate in developing the transition plan. They note, "Many pastors are ideally suited to mentor a successor, but others are not."[15] Third, the pastor must practice a disciplined absence from the board's transition process. Last, the pastor must keep his promises that were laid out in the transition plan.[16]

In regard to who a transitioning pastor should be, Weese and Crabtree write, "Today's leader has to manage these same transitions as well. But the impetus to do so requires understanding management as an expression of discipleship. The example of Jesus is rich and illuminating."[17] In examining Jesus' leadership style, the authors offer six succession principles. The first three principles focus primarily on the incoming pastor, while the last three principles encourage the exiting pastor to (1) "envision abundance" or cast a vision of a better future, (2) "create capacity" in others' lives, and (3) "fight the demons" or wrestle with weaknesses that will emerge in the midst of the transition.[18] Weese and Crabtree note, "Many pastors are not comfortable creating capacity at the leadership level. They find it threatening to reproduce or transfer what they know to other leaders, or to use the gifts of others that are executive in nature...A congregation planning a transition needs to build capacity at the leadership level."[19] In

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picture and begin a helpful conversation whose trajectory would be picked up a decade later by the authors of *Next.*

[15] Weese and Crabtree, *The Elephant in the Boardroom*, 48.

[16] Ibid., 47-50.

[17] Ibid., 16.

[18] Ibid., 22-25.

[19] Ibid., 24.

Table 1, below, an overview of *The Elephant in the Boardroom* has been provided.

Weese and Crabtree's concepts, emphasizing elements of proclaiming, becoming, and

empowering, are recorded at the bottom of the table.

Table 1. Overview of *The Elephant in the Boardroom*

Title:	*The Elephant in the Boardroom*		
Outline of the book:	The Players	The Culture	The Components
Key Argument:	Five key players need to be talking about transition, including the pastor.		
Main Take-Away(s):	1) Every pastor is a transitioning pastor. 2) Pastors should help develop a transition plan. 3) Pastors should practice a disciplined absence from the board's transition plan. 4) Pastors should keep their promises.		
Emphasis: Proclaiming, Becoming, Leading	Leading • Envision abundance • Create capacity • Fight the demons Becoming • Management, an expression of discipleship Proclaiming • Pastor 1 of 5 key players • Must talk about transition		

***Next*: The Need, Issues, and
Components of Transitions**

Next builds on the shoulders of *The Elephant in the Boardroom*. *Next* focuses

on the responsibility of pastors to facilitate a successful transition. John Ortberg writes in

the foreword, "In *Next*, Warren and William walk through what churches and pastors

need to know about the hows and whens and whys of who's next."[20]

The book argues that successions have become important due to the high level

of responsibility placed on iconic leaders. The primary argument is that with leadership

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[20]Vanderbloemen and Bird, *Next*, 8. Interestingly, the "who" is not covered in Ortberg's introductory remarks of *Next*.

comes greater responsibility. Like *The Elephant in the Boardroom*, *Next* provides four church leader cultures.[21]

Next looks to create the need for pastors to engage to ensure a successful transition, survey the issues, and highlight components of a successful transition. This work stresses the importance for a leader to have a transition plan. Ironically, the authors use Mark Driscoll as an example of success in the introduction of the book.[22] *Next* continues the conversation begun by *The Elephant in the Boardroom* and rightly calls for pastors to be intentional about transition. The authors write, "To date, very few full books are available on pastoral succession, but one of the best is the above-mentioned book, *The Elephant in the Boardroom*."[23]

Regarding who a transitioning pastor should be, Vanderbloemen and Bird record that preparing successors is key, even biblical.[24] In the second chapter, ten commandments of a succession plan are offered. While most of these center around articulating a vision for a succession plan, there are three commands that address who the transitioning pastor should be. The transitioning pastor should be the facilitator of a broad culture of leadership development, willing to share in teaching responsibility and willing to allow others to lead.

The authors share the example of Larry Osborn (author of *Sticky Teams*): "Not only did he develop a preaching team, but more than that, a true leadership team made up

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[21]Vanderbloemen and Bird, *Next*, 73. The four church leader cultures are Key Administrators, Chief of Chiefs, Executive, and King (or Queen).

[22]Vanderbloemen and Bird provide substantial research surrounding succession, along with prominent case studies, and conclude by offering four areas to focus on in order to transition well: finding a successor, finances, a successor's success, and long-term planning.

[23]Vanderbloemen and Bird, *Next*, 30. Only a portion of *The Elephant in the Boardroom* is directed toward the exiting pastors as the book's scope covers five key players as well as four different categories of church.

[24]Ibid., 25.

of multiple senior pastors (think of a law firm with 'partners' rather than the model most churches follow of a sole proprietorship with valued employees)."[25]

A large portion of *Next* focuses on the components of the exit strategy. While *Next* offers many case studies of ministerial transition and other leadership transitions, two leaders highlighted, Pope John Paul II and Francis Chan are unique as they intentionally exited prestigious ministry positions early. "When pastors experience a place of growing influence, the vast majority tend to stay with it. Francis did not. After leading the church for sixteen years, he resigned. He was forty-three at the time. As his friend Mark Driscoll asked him in a public interview, 'You've got a good thing going and you hit the eject button. Are you cuckoo? What were you thinking?'"[26] Sadly, Driscoll would shortly be exiting his own ministry, but not voluntarily. The parallels are striking. By highlighting Pope John Paul II and Francis Chan, the authors point to individuals intentionally decreasing so that others can increase, a quality that is rarely found in leadership circles.[27]

Next raises several other concerns regarding churches and their pastors. Churches age and become set in their ways with their pastors; new lifeblood and

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[25]Vanderbloemen and Bird, *Next*, 37.

[26]Ibid., 60. Vanderbloemen and Bird, *Next*, 59-60, write,
Francis answered that question in many different published interviews, addressing it from several different perspectives. He told one interviewer that he was fighting pride and arrogance. He told another he was afraid the church was becoming too much about him and not enough about the Holy Spirit. Another explanation he offered: he didn't want to stifle Cornerstone Church's leadership through too much dependence on him.

[27]Rusty Ricketson picks up on the concept of decreasing so that others may increase, or followership, in *Follower First* (Cumming, GA: Heartworks, 2009). Others, such as Tracey Armstrong and Allen Hamlin Jr., like Ricketson, have explored followership from a biblical perspective. Tracey Armstrong, *Followership* (Shippensburg, PA: Destiny Image, 2010); Allen Hamlin, Jr., *Embracing Followership: How to Thrive in a Leader-Centric Culture* (Bellingham, WA: Kirkdale, 2016). Authors such as Barbara Kellerman have explored the concept of followership from the business world, examining followers' relationship to their leaders. Barbara Kellerman, *Followership: How Followers Are Creating Change and Changing Leaders* (Boston: Harvard Business Review Press, 2008).

teamwork can help keep teams agile and relevant.[28] Pastors can be outgrown by their congregation requiring a kingdom focus. "When leaders take a church to the maximum of their ability, then it's usually best for the church, the leader, and the kingdom of God to relocate to another church to start the growth cycle over again."[29]

Vanderbloemen and Bird explore factors that lead to failed handoffs: unwillingness to face the emotional sense of loss, hope that they can do it again, fear that all they have done will be lost under the next person, fear of the unknown, waiting on the right potential successor, and enjoyment of the comfort level they've achieved.[30] All of these factors point to two things: first, ownership trumping stewardship and second, a lack of humility (or high degree of hubris). Reflecting on the lessons learned from the Crystal Cathedral story, the authors write, "Senior pastors should spend more time developing the strength of their bench to create a potential leadership pipeline for every major leadership position within the church."[31] The authors note another lesson from First Baptist Dallas' failed transition, "Outgoing pastors must decrease so that incoming pastors can increase."[32] In Table 2 below, an overview of *Next* is provided.[33]

Synthesis of *The Elephant in the Boardroom* and Next

Both *The Elephant in the Boardroom* and *Next* call for pastors to lead through proclaiming. Weese and Crabtree call for the pastor to be one of many voices

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[28]Vanderbloemen and Bird, *Next*, 61-62.

[29]Ibid., 63.

[30]Ibid., 81-82.

[31]Vanderbloemen and Bird, *Next*, 105, note, "Filling key roles with relatives may work under one senior leader, but does not necessarily ensure smooth transitions to successors."

[32]Ibid., 109.

[33]Vanderbloemen and Bird's emphasis on proclaiming, becoming, and leading can be seen in table 2.

intentionally engaging in pastoral succession while Vanderbloemen and Bird sharpen the

focus to rest more on the senior pastor's influence on pastoral succession.

Both of these works speak in view of having a kingdom perspective that does

not focus on holding on but instead handing off leadership, power, and authority. Both

works call for an increased focus on discipleship and leadership development (or a

leadership pipeline). These works call for senior pastors to transition through the

leveraging of teams. They also point to a willingness to decrease and become a symbolic

follower of the succeeding leader through the process of empowerment while decreasing

so their successor might increase. In tables 2 and 3, a synthesis of becoming traits from

The Elephant in the Boardroom and *Next* can be seen. In *The Elephant in the*

Boardroom, the primary becoming trait is disciple maker. In *Next,* the becoming traits

include disciple maker as well as other salient traits.

Table 2. Overview of *Next*

Title:	Next		
Outline of the book:	Why Succession Planning Can't Wait	Be the Exception	Transition Well, Finish Strong
Key Argument:	Pastors are responsible for their transition plan.		
Main Take-Away(s):	1) A successful transition plan is premeditated. 2) There are many factors that can cause a failed transition. 3) A transitioning leader needs to focus on finding their successor, understanding the financial implications of succession, and setting their successor up for success.		
Emphasis: Proclaiming, Becoming, Leading	Leading • Find your successor • Watch your financials • Empower your successor Becoming • Learn from successful and failed handoffs Proclaiming • Plan for transition		

Table 3. Synthesis of becoming traits from *The Elephant in the Boardroom* and *Next*

Synthesis of Becoming Traits from *The Elephant in the Boardroom* and *Next*			
	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait
The Elephant in the Boardroom	Management an expression of discipleship (p. 16)		Disciple maker
Next	Engage in leadership development (p. 11) Share teaching (p. 35) Allow others to lead (p. 35) Leave early: Pope Benedict XVI (p. 12), Francis Chan (p. 59)	Loss aversion (p. 44) Not letting go (p. 48) Founder's syndrome (p. 78) Emotional sense of loss (p. 81) Overconfidence (p. 81) Personal loss (p. 81) Fear of the unknown (p. 82) Slow to find successor (p. 82) Need for personal comfort (p. 82)	Disciple maker Secure, humble, disciple maker Secure, humble, disciple maker Secure, humble Secure vs. fearful Secure vs. fearful Humility vs. hubris Secure vs. fearful Humility vs. hubris Secure vs. fearful Secure vs. fearful Secure vs. fearful Kingdom-focused vs. selfish

Pastoral Perspectives on Transitions: Russell, Passavant, Mullins, and Johnson

Complementing the discussion started by *The Elephant in the Boardroom* and continued by *Next* for pastors to be intentional in their own leadership successions, a handful of successfully transitioned pastors have written about their experiences. These works, rising out of pastors' unique experiences in their own transitions, offer plans and perspectives for transitioning pastors from men who have successfully transitioned. These successfully transitioned pastors are Bob Russell, Jay Passavant, Tom Mullins, and Gary Johnson.

Bob Russell: *Transition Plan*

Russell states his heart in writing *Transition Plan*: "My vision is that every church and ministry organization in the world would have a transition plan."[34] In many ways this work written in 2013 helped to hone Vanderbloemen and Bird's mantra that pastors should have a transition plan. *Next* makes several references to Bob Russell noting, "one thread of their story is that Bob cultivated several preaching associates, one of whom – Dave – received wide affirmation as a potential successor...'I [Bob] concluded that the church would do better in the long term if I stepped aside.'"[35]

Russell's transitional success was not limited to the fact that he invested in others and was willing to decrease so that others could increase. *Transition Plan's* foreword by Dave Stone sheds light on Russell's character. Stone writes, "Bob specializes in encouragement and trust...His goal was to set me up as best he could. On more than one occasion he said to me, 'What can I do or say to the congregation that will help you in your future leadership....' The fact that our hand-off went well is a testimony to Bob's being a humble servant."[36] Stone's candid insight into Russell's character perhaps comes closest to highlighting who a successful transition pastor should *be*. Russell writes, "Humor and humility were two essential virtues in making the transition successful."[37] He also upholds the mentoring relationship of Paul and Timothy as a model of investing in the next leader.[38]

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[34]Bob Russell and Bryan Bucher, *Transition Plan: 7 Secrets Every Leader Needs to Know* (Louisville: Ministers Label Publishing, 2010), Kindle, chronicles the well-planned, orchestrated transition of the senior pastor of Southeastern Christian Church from Bob Russell to Dave Stone. *Transition Plan* focuses on Russell's story, reason for transitioning, lessons learned, how to say goodbye, and how to retire.

[35]Vanderbloemen and Bird, *Next*, 132.

[36]Russell and Bucher, *Transition Plan*, locs. 33-44.

[37]Ibid., loc. 229.

[38]Russell records, "That's why, during the last 20 years of my ministry, most of our staff hires came from within." Ibid., loc., 437. He also notes, "It's been my observation that many young ministers are

In his third chapter, Russell offers seven observations in light of transition. His second is telling: "The character of the persons involved in the transition is much more important than the timing or the strategy."[39] As Russell makes this observation, he looks to humility and security of the individual as the drivers of a healthy transition. Interestingly, an influential book in Russell's journey was Joel Gregory's book, *Too Great a Temptation: The Seductive Power of America's Super Church,* which marquees aspects of an unhealthy transition.[40] This book was the catalyst to Russell beginning to think about transitioning well; Russell concludes, "For the good of the organization you make sacrifices you wouldn't ordinarily make; you need to do so."[41] Again Russell writes, "At some point you have to go from being 'the man' to 'the biggest fan,' rooting on the new senior leader and congregation."[42]

Jay Passavant: *Seamless Succession*

Written in 2015, *Seamless Succession* continues the pastoral transition conversation from a multi-site perspective.[43] Passavant makes the bold statement that 70

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focused on winning the lost but have little concern for nurturing those who are saved." Russell and Bucher, *Transition Plan*, loc. 607.

[39]Ibid., loc. 478.

[40]In contrast to Russell's successful transition, *Too Great a Temptation* details the failed pastoral transition of First Baptist Dallas from a failed successor's perspective. Joel Gregory, *Too Great a Temptation: The Seductive Power of America's Super Church* (Fort Worth: Summit Publishing, 1994). In tandem with *Too Great a Temptation*, *Standing on the Promises* addresses Criswell's perspective on the failed pastoral transition with Gregory. W. A. Criswell, *Standing on the Promises: The Autobiography of W. A. Criswell* (Dallas: W Publishing, 1991). These two writings combined reflect well the title of the third appendix of *Next*: "A Successful Pastorate Doesn't Always Guarantee Good Pastoral Succession."

[41]Russell and Bucher, *Transition Plan,* loc. 813.

[42]Ibid., loc. 857.

[43]Jay Passavant and Jim Tomberlin, *Seamless Succession* (Camarillo, CA: Xulon, 2015). *Seamlesss Succession* records Passavant's own succession at North Way Church. In view of a transition plan, *Seamless Succession* offers seven principles that, if contextualized and implemented, will help a

percent of successions fail in the first three years. Passavant writes,

> In all of my research leading up to succession, and even during succession, I rarely came across material that gave adequate attention to both the gravity and the glory of the succession process. There was little, if any, reference to the aim and hope of God for His people through this process. I did, however, find a plethora of material that erred towards either pessimism and fear, or pride and naiveté. All of which, in their own way, are indicative of a less than God-centered approach to succession....[44]

Seamless Succession references the journey of Bill Hybels toward transition and often interacts with the authors of *Next*. In view of who a pastor should be, Passavant writes that he should be a man of prayer. "[Transition is] messy and filled with back-tracking, readjustment, and prayer – and if we're wise, lots of prayer."[45] Passavant also stresses the utilization of a team in pastoral transition. "We know from the beginning that the relational dynamics within the transition team were very important."[46] Passavant is unique from other writers in his stress on prayer and the dynamic of team in pastoral transition. Like others, he speaks of developing leaders and writes, "Two of the biggest reasons for host rejection in the succession process are (1) the senior pastor is unable, or in some cases unwilling, to step down from his role in a gracious way; and (2) the new senior leader is not embraced by the congregation as God's new leader for the next season of the church's life. In cases where the second is true, it is often the direct result of the first."[47] Passavant stresses not being the only teaching voice as this empowers other leaders and lessens the failure of the succession plan.

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church of any size navigate a leadership transition: initiate, cultivate, communicate, investigate, integrate, celebrate, evaluate.

[44]Passavant and Tomberlin, *Seamless Succession*, xvii.

[45]Ibid., 23.

[46]Ibid., 28.

[47]Ibid., 36.

Seamless Succession affirms the need for pastors to operate with a kingdom perspective while leveraging teams, intentionally discipling, and decreasing so that others can increase. Passavant points to prayer and preaching (shared power) as key for a successfully transitioning pastor.

Tom Mullins: *Passing the Leadership Baton*

Also written in 2015, *Passing the Leadership Baton* looks at pastoral transition from a generational perspective.[48] Tom Mullins gives his own example of a successful transition (father to son) while providing wonderful interviews and case studies from other father-son transitions that were not intentionally mapped out (Schuller, Falwell, and Osteen). *Passing the Leadership Baton* references and interacts several times with Vanderbloemen and Bird, Passavant, and Russell (fairly extensively with Russell). Mullins specifically references these three in regard to developing and clearly communicating a transition plan. With respect to communication, Mullins quotes Ralph G. Nichols: "The number one criteria for banishment and promotion for professionals is an ability to communicate effectively."[49] Tom Mullins also makes several references to John Maxwell, who in Mullins' foreword writes, "The true measure of success for a leader is measured by succession."[50]

The big ideas in *Passing the Leadership Baton* are leading through transition, the ministry is not the transitioning leader's (moves toward a philosophy of transition), a game plan, positioning others for success, leading through crisis-driven transitions, and

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[48]Tom Dale Mullins, *Passing the Leadership Baton: A Winning Transition Plan for Your Ministry* (Nashville: Thomas Nelson, 2015).

[49]Ibid., 81.

[50]Ibid., xiv. Mullins was mentored by John Maxwell, the author of multiple popular leadership books.

creating a legacy (philosophy).[51] Adding to the conversation of who a successfully

transitioning pastor should be, one of Mullins greatest insights can be seen in his call for

an intentional investment in a "son" as well as reiterating the need for having a transition

plan.[52] Mullins quotes Larry Stockstill regarding investing in others: "Partners will

determine your accomplishments, but spiritual sons will determine your legacy. Partners

operate while you are alive, but sons continue after you are gone."[53]

   Mullins notes that transitioning pastors must be willing to decrease: "A

transition will always cost you something."[54] Mullins shares insightfully of this sacrifice

using the example of Dave Stone and Bob Russell and in so doing highlights who a

successful transitioning pastor should be:

> When Dave Stone was transitioning into his role as successor to Bob Russell, in
> addition to increasing his pulpit time, Bob gave him the opportunity to speak on
> special occasions and even peak times, like Easter and Christmas. . . . Recently I
> was checking out Southeast Christian Church's website and noticed that Kyle
> Idleman, the pastor slated to succeed Dave, had given the sermon at their Christmas
> Eve services this year. Clearly Dave has remembered how Bob prepared him with
> some prime weekend speaking slots, and is doing the same for Kyle. What I love is
> that there was no pride on Bob's part.[55]

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[51]Mullins, *Passing the Leadership Baton*, ix. Mullins writes, "According to statistics presented at a Leadership Network Succession Conference on March 26, 2013, close to sixty thousand churches go through transitions in leadership each year." Ibid., 6.

[52]Ironically, Mullins references Coral Ridge as a good succession; it has since come to light that their pastor has experienced moral failure. Regarding adoption of spiritual sons, Mullins, *Passing the Leadership Baton*, 146, writes,
> The number one question I'm asked since I turned the leadership over to Todd is, "Will you mentor me?" Whenever I speak at conferences, I always get a handful of guys who approach me with that question. They all want a spiritual father to come alongside them and stir up their gifts and help them get to the next level. Many admittedly don't have earthly fathers who encouraged them or validated them. Accordingly, I feel it is my job to stand in the gap and be the spiritual dad they desperately long for and need as they grow in their leadership.

[53]Larry Stockstill, *The Surge: A Global Church-Planting Initiative* (Pennsauken, NJ: BookBaby, 2012), 57.

[54]Mullins, *Passing the Leadership Baton,* 25.

[55]Ibid., 96.

Mullins underscores the need for a team and continued mentoring during a transition, as identified in his interview with Dave Stone (Bob Russell's successor). He writes, "In retrospect, both he and Bob said that if they had the transition to do again, they would be a lot more intentional to schedule monthly meetings together for the first year. A meeting in those first crucial months might have saved Dave a lot of unnecessary angst. I'm convinced that all successors crave the approval and encouragement only a predecessor can offer."[56] Mullins' closing thoughts echo Russell and Passavant. "Transition really comes down to being an issue of humility and surrender."[57]

From a kingdom perspective, Mullins attacks the idea of "ownership" and encourages a healthy stewardship of ministry. He refreshingly writes, "It's not 'your' ministry . . . it isn't your church; it's God's church!"[58] In looking at characteristics of a successor (these would seem to be reciprocal characteristics that should be ascribed to the transitioning pastor), Mullins champions integrity, talent, organizational skills, team-builders, fruit bearers, and DNA carriers. In view of a team, Mullins writes, "This person also needs to be secure and not afraid to hand off point leadership to the team."[59]

Gary Johnson: *Leader><Shift*

Leader><Shift cites a variety of principles regarding pastoral transition.

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[56]Mullins, *Passing the Leadership Baton*, 37.

[57]Ibid., 200.

[58]Ibid., 39.

[59]Ibid., 84. Mullins presents Henrietta Mears as an example of ministry stewardship. Mullins writes,

> Henrietta never wavered in fulfilling her God-given destiny during her generation. "When I consider my ministry, I think of the world. Anything less than that would not be worthy of Christ, nor of his will for my life.". . . Three years after her arrival at the church, Sunday school attendance grew from four hundred to four thousand. And during her tenure, more than four hundred young people entered full-time Christian service. One of the young people who was greatly impacted by Henrietta Mears's ministry was Dr. Bill Bright. Ibid., 188.

Johnson continues the theme begun in *The Elephant in the Boardroom:* pastoral transition must be addressed. He quotes Weese and Crabtree:

> It is important to make the point that struggle around leader transition is almost all emotional and/or spiritual. We are afraid of the topic and therefore do not talk about it. We do not talk about it, and therefore we are afraid of it. The fact that we avoid such issues, make discussion of them taboo, reward silence, punish honesty, and put systems in place that perpetuate dysfunction is a spiritual issue.[60]

Johnson's work is unique in that he makes the argument (this is clear from the title) that the key to a good succession plan is that one individual becomes less while another becomes more. The key to a good succession plan is a retiring pastor becoming less while his successor increases. While this is alluded to and discussed in the three previous books, Johnson's book is laser-focused on this principle. For Johnson, everything that makes a transitioning pastor successful flows out of the willingness to decrease.[61] In his second chapter, Johnson makes references to Bob Russell and claims that Southeastern Christian Church reflects a succession that embodied one becoming less and another becoming more.[62]

From a kingdom perspective, Johnson reminds pastors to remember what business they are in. "As leaders of the local church, we may have forgotten what business we're in today."[63] Johnson offers leading the church and bringing people to Christ as the overarching mission of the pastor.

Like Russell, Johnson offers a "top-ten list" for the incoming pastor. Regarding who a transitioning pastor should be, these characteristics are most likely

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[60]Gary L. Johnson, *Leader><Shift: One Becomes Less while Another Becomes More* (Indianapolis: Moeller Printing, 2013), loc. 472, Kindle.

[61]Russell and Mullins both call for humility, and Passavant calls for prayer (one could argue, only the humble pray).

[62]Johnson, *Leader<>Shift*, loc. 390.

[63]Ibid., loc. 563.

reciprocal for both the exiting and entering pastor. Johnson's "top-ten list" consists of

1) Spiritual formation (holiness, humility, prayer, Scripture devotion)
2) Formal education and ministry experience
3) Having compassion for broken, disadvantaged and unbelieving people
4) Gifted in communicating Scripture
5) Possessing leadership skills
6) Being transparent and approachable
7) Enjoying people
8) Having a good work ethic
9) Pursuing life-long learning
10) An authentic call to pastoral ministry[64]

From this list, humility and prayer are the common denominator among Russell,

Passavant, and Mullins. It would seem that Russell and Mullins take a stronger

discipleship emphasis while Johnson moves toward evangelism and mercy ministries

(which is easily argued to be a subset of discipleship). Johnson echoes Passavant in

highlighting the gift of communication (see no. 4 in Johnson's list above).

Johnson affirms that a team is necessary for transition. He cites Chand and

Bronner, authors of *Planning Your Succession: Preparing for Your Future*, comparing

successful succession to success on the ball field, executed by three players. Chand and

Bronner note, "That's because the champions on any field never achieve success alone.

Actual 'wins' always require a team mindset, a practiced pursuit, and an absence of

preoccupation with who 'looks best' or who 'gets the credit.'"[65] Johnson also speaks to

the need of a leadership pipeline and of developing leaders within the organization.

While focusing on leadership development, Johnson looks at discipleship through the

example of Paul and Timothy as well as Psalm 127. Echoing Russell (Paul and Timothy)

and then Mullins ("sonship"), Johnson makes a strong case for discipleship. In his

epilogue Johnson writes, "People do not remember how we came into the ministry; they

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[64]Johnson, *Leader<>Shift*, loc. 1234.

[65]Ibid., loc. 1321.

remember how we left."[66] For Johnson this is best remembered in his title *Leader >< Shift: One Becomes Less While Another Becomes More.*

Synthesis of Russell, Passavant,
Mullins, and Johnson

Russell's work places an emphasis on being an individual who disciples and decreases, and sacrifice; being secure enough in self to not be threatened and therefore able to be a fan of your successor; and, to be a leader who faces the transition process with humor and humility. Passavant stresses being prayerful, and being a team player while echoing Russell's emphasis on being an individual engaged in discipleship who has a heart that is willing to decrease. Mullins continues the theme of being a disciple who is humble enough to be willing to count the cost of transition and sacrifice for the sake of the kingdom. Johnson brings the three previous writers' theme of humility and sacrifice into sharp focus by calling transitional pastors to decrease so their successors may increase. Though his emphasis lies in decreasing so others increase, Johnson also affirms the necessity of a successful transitional pastor to be a team player who is active in discipleship. Table 4, below, offers a synthesis of becoming traits from the works of Russell, Passavant, Mullins, and Johnson.

Other Literature for Pastors and Church Boards

There are many other resources from which to glean wisdom concerning pastoral transition. There have been other books penned toward pastors and church boards and decision makers. Yet the majority of these are not part of the current transition conversation that began in 2004 with *The Elephant in the Boardroom*. Before this time, the literature assumed that the outgoing pastor had little influence over the pastoral transition process. Some of the following resources were quoted sparingly by the above six works regarding pastoral succession. This section provides a brief overview of these

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[66]Johnson, *Leader<>Shift*, 2805.

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resources to acknowledge their presence in the conversation but does not investigate them in depth as they do not greatly impact the current pastoral transition conversation.

Books for Pastors

   Planning Your Succession is directed toward pastors and churches, encouraging them to think about transitions.[67] *Beginning Ministry Together* speaks to the future once a transition is in play.[68] These works and others like them collectively encourage pre-planning and speak to how churches can best weather transitions.

Table 4. Synthesis of becoming traits from Russell, Passavant, Mullins, and Johnson

	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait
Russell	Encourager (33-22/1285 Kindle loc.)		Encourager
	Trustworthy (33-44/1285 Kindle loc.)		Trustworthy
	Set up others for success (33-22/1285 Kindle loc.)		Mentor, Disciple Maker
	Humor (229/1285 Kindle loc.)		Sense of Humor
	Sacrifice for the greater good (813/1285 Kindle loc.)		Sacrificial, Wise
	Move from "the man" to "biggest fan" (857/1285 Kindle loc.)		Humility, Coach
	Humility (229/1285 Kindle loc.)		Humility
	Humble and Secure (478/1285 Kindle loc.)		Humility, Secure
		Discipled Dave Stone (p. 132)	Disciple Maker
		Stepped aside (p. 132)	Sacrificial, Humility, Secure

[67]Samuel R. Chand and Dale C. Bronner, *Planning Your Succession: Preparing for Your Future* (Highland Park, IL: Mall Publishing, 2008).

[68]Roy M. Oswald, James Heath, and Ann Heath, *Beginning Ministry Together: The Alban Handbook for Clergy Transitions* (Bethesda, MD: Rowman & Littlefield, 2003).

Table 4 continued

Passavant	Team Player (p. 28) Share Teaching (p. 36)		Team Player Humility, Disciple Maker
		Prayer (p. 23)	Humility, Man of Prayer
Mullins	Healthy view of ownership ~ "not yours" (p. 6)		Humility
	Focus on others' success (p. 6)		Mentor, Disciple Maker
	Willing to decrease (p. 25)		Humility, Secure
	Willing to sacrifice (p. 96)		Sacrificial, Humility, Secure
	Humility (p. 200)		Humility
	Surrender (p. 200)		Humility, Sacrificial, Secure
	Integrity (p. 84)		Integrity
	Secure (p. 84)		Secure
		Invest in a "spiritual son" (p. 146)	Disciple Maker
		Facilitate a team (p. 37)	Team Minded
Johnson	Decrease so others can increase (390/3011 Kindle loc.)		Humility, Sacrificial, Secure
	Humility Compassion Transparent Approachable Strong Work Ethic Life-Long Learner Calling (1234/3011)		Humility Compassion Transparency Approachable Hard Worker Learner Called, Secure
		Soul Winner (563/3011 Kindle loc.)	Compassionate

**Books for Church Boards
or Search Teams**

There is a plethora of books directed toward church boards and search teams.[69]
These works, written prior to *The Elephant in the Boardroom,* do not focus on the pre-
transition development of a transitional leader but instead are designed for church boards
and search teams addressing a context in which the transitioning pastor has already
departed. These books specifically look at post-transition responses.[70] This paper
focuses on the pre-transition development of a transitional leader and therefore does not
deal extensively with these works.

Academic Work

Having examined the conversation from the current consulting and pastoral
literature, the line of inquiry now turns to the academic world as well as published articles.
As the current conversation in pastoral transition dates back to *The Elephant in the
Boardroom* (2004) and then is picked up a decade later by *Next: Pastoral Succession that
Works* (2014) and other voices such as Russell, Mullins, Passavant, and Johnson, very little
has been written during this time from the perspective of the academic world that pertains

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[69]Elizabeth Rice Achtemeier, *So You're Looking for a New Preacher: A Guide for Pulpit
Nominating Committees* (Grand Rapids: Wm. B. Eerdmans, 1991), makes recommendations on what to
look for in a preacher. Alan G. Gripe, *Interim Pastor's Manual,* rev. ed. (Louisville: Geneva Press, 1997),
identifies five tasks of an interim pastor (especially for the Presbyterian Church USA). Loren B. Mead, *A
Change of Pastors . . . and How It Affects Change in the Congregation* (Herndon, VA: Rowman &
Littlefield, 2012), explores the interim time between pastors. Gregory Tyree, *Helping Your Church
Discover Its Next Pastor: A Manual for Pastoral Search Committees* (Charleston, SC: CreateSpace
Independent, 2013), explores the pastoral discovery process. Joseph L. Umidi, *Confirming the Pastoral
Call: A Guide to Matching Candidates and Congregations* (Grand Rapids: Kregel, 2000), is a guide for
matching candidates to congregations. John Vonhof, *The Alban Guide to Managing the Pastoral Search
Process* (Bethesda, MD: Alban Institute, 1999), is a guide to the search process. Ralph C. Watkins, *Leading
Your African American Church through Pastoral Transitions* (Valley Forge, PA: Judson Press, 2010),
features ministry profiles based on interviews with pastors and churches that have navigated pastoral
transitions. Edward A. White, *Saying Goodbye: A Time of Growth for Congregations and Pastors* (Savage,
MD: Rowman & Littlefield, 1990), promotes pastoral transitions as growth experiences.

[70]The exception is found in *Leading Your African American Church,* which offers ministry
profiles.

to the traits of successful transitional pastors. Two dissertations worth mentioning that interact with *The Elephant in the Boardroom* are May (2010) and McCready (2011).

Gary May

Gary May's work *An Analysis of Selected Variables that Influence Postsuccession Performance in Southern Baptist Churches* (2010) focuses on Weese and Crabtree's call for a succession plan. May's work studies pastors in the Southern Baptist Churches (SBC) called in 2003 and the factors from the decade surrounding their call (1998-2008).[71] May examines the relationship between pre-succession context of succession and the performance variables, successor origins, and post-succession performance of the successor.[72] Regarding succession planning, May insightfully comments, "Just as the nonprofit world is beginning to catch on to an idea used in the corporate world for several years, churches might also begin to see the benefits of succession planning. The rewards for such thinking are clearly articulated in change theory."[73]

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[71]Gary Royce May, "An Analysis of Selected Variables That Influence Postsuccession Performance in Southern Baptist Churches" (Ph.D., diss., The Southern Baptist Theological Seminary, 2010).

[72]In the "Recent Dissertations*"* section within chap. 2 of his dissertation, McCready interacts in a helpful way with May's dissertation. Robert Collison McCready, "Relay Succession in the Senior Pastorate: A Multiple Case Study Method" (Ph.D., diss., The Southern Baptist Theological Seminary, 2011), 120, states,

> In his research on post-succession performance in Southern Baptist churches, May found there was no relationship between pre-succession performance of the church as measured by Sunday school and worship attendance and post-succession performance of the church. He suggests that this may offer opportunity for the church to grow even though there may have been poor pre-succession performance.

In addition, McCready finds that "93% of churches that called a pastor in the year 2003 used an outside succession . . . [and] less than 1% of churches engaged in a relay succession." Ibid., 115. He explains, "The refinement of the intentional interim process and greater use of inside and relay succession could present opportunities for improved post-succession performance." Ibid., 120.

[73]May, "An Analysis of Selected Variables," 123. May notes, "The limited number of relay successions available for analysis affirmed suspicions of the lack of succession planning among Southern Baptist churches." Ibid.

May mentions two unsuccessful relay successions for W. A. Criswell—first Jimmy Draper followed by Joel Gregory at First Baptist Dallas.[74] May notes that larger and medium-size churches have a greater chance of producing an internal candidate than a smaller church. For this reason most Southern Baptist succession pastors are called from outside the church.[75] May also recognizes that voluntary exits go more smoothly than non-voluntary exits.[76]

While May's work is helpful, it draws from Weese and Crabtree's work and does not focus directly on the transitioning pastor, but more on the succession itself. A couple of traits for a successful transitioning pastor can be extrapolated from May's work. First, internal candidates have the potential of being invested in by the exiting pastor. Second, it is important that the transitioning and succeeding pastors work well together to ensure successful transition. Third, pastors who voluntarily exit produce long-term benefits for their congregations.

Robert McCready

Robert Collison McCready's work, "Relay Succession in the Senior Pastorate: A Multiple Case Study Method" (2011), also springboards out of Weese and Crabtree's work. This dissertation looks at a systematic succession-planning system and the principles of relay succession within the Church of God.[77] McCready states, "There have

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[74]May, "An Analysis of Selected Variables," 41.

[75]Ibid., 42.

[76]Ibid., 46.

[77]In addressing the need to study succession dynamics, McCready cites Wheeler's dissertation on succession dynamics in megachurches. McCready, "Relay Succession in the Senior Pastorate," 39-40, quotes Wheeler:

This study is vital because the phenomenon of transition is relatively new in megachurches and because of the number of leadership changes that will occur over the next two decades. Many megachurches will be facing their first directional leader transition. This transition will be

been a few recent dissertations that have impacted the study of succession in the local church."[78] McCready indirectly shines light on several helpful conversations concerning traits of transitioning leaders.[79] McCready, writing on political forces that can lead to failed transitions, demonstrates the importance of leaders being willing to disengage and decrease so that others might increase.[80] Highlighting Bob Russell's succession as a positive example, McCready records,

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challenging not simply because their senior pastor has long tenure but also because he/she is the founding pastor of the church. (Wheeler 2008, 43)

[78]McCready, "Relay Succession in the Senior Pastorate," 54. Two interesting studies that McCready also explores are Helmich's work (Helmich 1975) followed by Richards' work (Richards 2008). On p. 55, explains,

Richards picked up Helmich's line of inquiry in her 2008 multiple-case study that examined the CEO's preference to make senior-level appointments based on 'gut reactions' rather than formal processes of succession planning. She indicates that many leaders support the process of succession planning in lower- and middle-level management, but then utilize highly idiosyncratic methods to identify potential successors for high-level positions. . . . CEOs, as indicated from the interviews, insist upon being able to make their own senior management appointments, using processes that are mostly not transparent.

See also Donald L. Helmich, "Corporate Succession: An Examination," *Academy of Management Journal* 18, no. 3 (1975): 429-41.

[79]McCready, "Relay Succession in the Senior Pastorate," 40, writes, writes,

According to Wheeler, since many megachurches are still led by the founding pastor, there tends to be a lack of understanding of the succession process. He conducted three case studies that looked at the various methods used by megachurches to transition leaders. He found there was a strong preference for inside successors in megachurches because of the desire not to change the basic organizational focus. Not all of the study churches, however, were able to complete an inside transition. (Wheeler, *The Leadership Succession Process in Megachurches*, 311-19)

[80]Ibid., 58. McCready continues,

W. A. Criswell, the incumbent pastor, sought to train an associate to succeed him on at least two occasions. Political forces have already been mentioned as a reason that successions are initiated; however, political forces can also prevent a succession from happening. The latter seemed to be the case at First Baptist, Dallas.

John Perry, *Walking God's Path: The Life and Ministry of Jimmy Draper* (Nashville: Broadman and Holman, 2005), 120-21, states,

Betty Criswell held a position of great influence over her husband and his church from behind the scenes. Mrs. Criswell's power base was rooted in the four-hundred-member Sunday school class she taught each week. It included some of the wealthiest and most powerful members of the church, men and women who shared Mrs. Criswell's desire to see Dr. Criswell's light shine unchallenged. Some deacons were a part of this group and some weren't, leading to the formation of various political factions within the deacon body.

Russell suggests that incumbent leaders should step aside following a succession. He relates his own experience in deciding not to return to Southeast for at least a year following his retirement. He states, "It helped Dave Stone [Russell's successor] and the staff feel as though they could make changes without me 'looking over their shoulder.' It denied any critics in the congregation the opportunity to look at my body language and try to get me to side with their objection to a new program or song selection" (Russell and Bucher 2010, 32-33). May agrees, indicating that "discussion among pastors and parishioners has often cast a negative attitude toward pastors who remain in the congregation following their retirement" (May 2010, 117). Park suggests that it takes time for the new pastor to stabilize his leadership, "taking years rather than months" (Park 2005, 170).[81]

In his profile of current study, McCready records, "The literature review has shown that part of the pastor's role is to provide for the care of the congregation. This responsibility includes training leaders that can succeed him in his role. It also includes seeking to foster an environment in the local church whereby aspiring leaders are mentored to do the work of ministry."[82] He highlights that relay succession has multiple benefits, one of which is "The successor in a relay succession can obtain on-the-job training through exposure to the CEO's responsibilities."[83] As with May's work, McCready's work indirectly sheds light on the traits of a successful transitioning pastor. These traits include exiting voluntarily and investing in other leaders. Table 5 offers a synthesis of becoming traits from May's and McCready's dissertations.

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[81]McCready, "Relay Succession in the Senior Pastorate," 63.

[82]Ibid., 66.

[83]Ibid., 49. McCready notes, "In 1987, Vancil first coined the term 'relay succession' in his work, *Passing the Baton: Managing the Process of CEO Succession* (Vancil 1987b, 108). Vancil's text was the first to examine relay succession in the corporate environment in a holistic manner." In defining the relay process, Richard F. Vancil, *Passing the Baton: Managing the Process of CEO Succession* (Boston: Harvard Business School Press, 1987), 1, states,

> The most common pattern of CEO succession in large U.S. corporations is to select an overt heir apparent several years before the incumbent CEO is expected to step down. Analogous to a relay race, these two executives work in tandem until the CEO passes the baton (the CEO title) to his teammate. The other succession process, less common but more widely reported in the business press, is a horse race, an exciting event yielding a winner—and several losers. In the relay process, the promotion of the heir apparent is almost a nonevent. (Vancil 1987b, 1).

Table 5. Synthesis of becoming traits from May and McCready

	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait
May		Invest in others	Disciple Maker
		Exit voluntarily	Sacrificial, Humility
		Work well with others	Others-centered, Team Player
McCready		Exit voluntarily	Sacrificial, Humility
		Invest in others	Disciple Maker
(Vancil)		Drama-less succession	Humble, Kind, Team Player

Synthesis of Academic Work

From an academic perspective, there has been little written on the topic of pastoral succession since Vanderbloemen and Bird wrote *Next*. May and McCready, whose work predates *Next*, provide helpful information from their trajectories of study that shed light on traits of transitional pastors. Beyond these works, little systematic, academic research (qualitative or quantitative studies) has been done related to the influence or profile of a successful transitioning pastor.

Literature from the Marketplace

In light of pastoral leadership succession, the marketplace provides some excellent resources that speak directly to leadership transition. *The Nonprofit Leadership Transition and Development Guide* speaks to intentional leadership development and the potential it brings.[84] *CEO Succession* identifies four elements essential to succession planning.[85] *Succession* walks readers through each step of the succession planning process.[86] *Effective Succession Planning* gives strategies for a complete, systematic

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[84]Adams, *The Nonprofit Leadership Transition and Development Guide.*

[85]Carey and Ogden, *CEO Succession.*

[86]Goldsmith, *Succession.*

succession plan.[87] *Inside CEO Succession* presents strategies for boards to implement

succession.[88] *Harvard Business Review on CEO Succession* is a compilation of articles,

including, "Almost Ready: How Leaders Move Up," "Ending the CEO Succession Crisis,"

and "Solve the Succession Crisis by Growing Inside-Outside Leaders."[89] Interestingly,

two of these works speak directly to leadership development (see *Nonprofit Leadership*

Transition and Development Guide and *Harvard Business Review on CEO Succession*),

but still the majority of the material focuses on the implementation of a succession plan

(what to do).[90] Three recent books that offer helpful snapshots of who a transitional

leader should be from a business perspective are *Succession: Are you Ready?* (by

Goldsmith), *Succession: Mastering the Make-or-Break Process of Leadership Transition*

(by Tichy), and *Transitions at the Top* (by Ciampa and Dotlich). The first of these three

works to be examined is *Succession: Are you Ready?,* by Goldsmith.

Goldsmith: *Succession: Are You Ready?*

Goldsmith's work is helpful in addressing who a transitioning leader should

be. Goldsmith writes, "'Academic' literature generally ignores the fact that CEOs—and

their successors—are human beings. Very little of what is written deals with 'soft'

personal issues like relationships, self-interest, ego, or (God forbid) feelings."[91] Goldsmith

notes that at the CEO level transition is very personal as the identity of CEOs is tied very

closely to their jobs. He states, "At the end of the day, the 'ownership' of how you

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[87]Rothwell, *Effective Succession Planning.*

[88]Saporito and Winum, *Inside CEO Succession*.

[89]Harvard Business School, *Harvard Business Review on CEO Succession*.

[90]Adams, *The Nonprofit Leadership Transition and Development Guide.*

[91]Goldsmith, *Succession*, xiv.

manage this process [transition] has to come from you."[92] Discussing hurdles, Goldsmith

insightfully notes, "Your first challenge may be getting over your own ego and sense of

importance."[93]

Goldsmith encourages executives to be more concerned about putting their

successor in a position where they will finish well instead of the transitioning leader going

out with a bang. One-third of his book is dedicated to coaching a potential successor. He

notes, "Like intelligence, hard work, and commitment, integrity should be a given."[94] He

argues that this willful decision will ultimately make the transitioning CEO look good.[95]

Regarding contributions and investing in others, Goldsmith writes, "They (CEOs) talk

with pride about the great leaders who they have helped to develop."[96] Having looked at

Goldsmith, the second book from the marketplace is *Succession: Mastering the Make-or-*

Break Process of Leadership Transition, by Tichy.

Tichy: *Succession: Mastering the Make-or-Break Process of Leadership Transition*

In Succession: Mastering the Make-or-Break Process of Leadership Transition,

Tichy focuses on Succession in the business world.[97] On the topic of the importance of

succession, Tichy writes,

> Not just at HP but also at virtually every company or organization on the planet,
> whether run for profit, not-for-profit, public or private, family or shareholder owned,

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[92]Goldsmith, *Succession*, xvii.

[93]Ibid., 34.

[94]Ibid., 85.

[95]Goldsmith quotes his mentor Frances Hesselbein: "Successful transition is the last act of a great leader." Ibid., xi.

[96]Ibid., 24.

[97]Noel M. Tichy, *Succession: Mastering the Make-or-Break Process of Leadership Transition* (New York: Portfolio, 2014).

there are two immutable facts about leadership: 1. Leadership matters. 2. Continuity of leadership matters. The corollary of this thesis is that the defining legacy of any individual's leadership is the quality and outcome of his or her commitment to putting a process in place expressly designed to ensure an orderly transition from present leader to future leader – at any time, for any reason – with minimal disruption and drama.[98]

For Tichy, succession is key to success. "CEO succession in any type of organization—from political, to not-for-profit, to business or the military—is the key determinant of organizational performance."[99]

While Goldsmith focuses on the soft side of leadership, Noel Tichy focuses on the nuts and bolts of a CEO's succession. Tichy gives much press time to the CEO succession pipeline, the insider or outsider dilemma, and the roles of the CEO, CHRO, and the board. In between the mechanics of the succession process, Tichy does give some indirect thoughts to who a transitioning leader should be in order to succeed. Tichy holds Jack Welch as an exemplary leader. "McNerney and I are both proud products of and participants in the Jack Welch era at GE, so it is only natural that we share a mutual admiration for Welch as an exemplary leader/teacher who developed more leaders than any CEO in modern business history."[100]

For Tichy the "crucible experiences" or what he refers to as "action learning" are key to developing leaders in a leadership pipeline, and Welch embodied this

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[98]Tichy, *Succession*, 20. Tichy states on p. 22,
I would estimate as high a percentage as 80 percent of Fortune 500 companies and an equivalent percentage of academic and other nonprofit institutions do have formal succession plans in place, but that is not really my point. Because in my experience all too often these formal plans are no more than that – empty formalities, technicalities, and charade-like check-the-box exercises. When push comes to shove, as it nearly always does, such plans and processes ostensibly designed to ensure an orderly, seamless, non-disruptive CEO succession, absent political infighting, cultural confusion, ambiguity, and ambivalence, often break down in practice.

[99]Ibid., 24.

[100]Ibid., 2. Tichy records on p. 3, "According to a report in *USA Today*, author Del Jones noted that the top three companies for producing CEOs of other companies at the time were GE with twenty-six, IBM with eighteen, and McKinsey with sixteen."

intentionality.[101] Tichy highlights the realization of Steelcase CEO James Hacket that

succession requires simultaneous transformation and leadership development. These

were "the true keys to the kingdom when it came to managing a CEO succession

process."[102] Tichy notes PepsiCo CEO Enrico's development into a leader who

"regarded his primary task as coaching and teaching other less-experienced colleagues to

fulfill their potential as leaders."[103] He writes of Enrico's successor Indra Nooyi,

> Under Nooyi, the leadership pipeline development process has evolved and taken on
> a new character, influenced by her own personal background and imprinting. Nooyi's
> 'war college' is not referred to as a war college, but is nonetheless a high-profile and
> high-priority program specifically devoted to off-site team building combined with
> soul-searching story-sharing sessions in which fifteen selected participants brought in
> from across the divisions solve real business problems in an informal, cross-
> functional setting. . . . As of August 2013, when I interviewed her, she had led nine
> groups of fifteen people on these excursions, for a grand total of around 135 future
> leaders, over a period of roughly two and a half years. Within another year, give or
> take a few months, she intends to cover and get to know in this intimate setting 300
> future leaders.[104]

Tichy highlights the importance of mentoring. Tichy, who gives much attention

to both GE and Pepsi, notes regarding these companies' unique philosophies to their

leadership pipelines, "PepsiCo has an interesting twist on the GE/Jack Welch 80-20 rule,

80 percent on the job and 20 percent formal development. At PepsiCo, Indra and the

leadership team assume that 70 percent is on the job, 20 percent mentoring and coaching,

and 10 percent from formal development programs."[105]

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[101]Tichy, *Succession*, 9. Others, like Goldsmith, *Succession*, xi, refer to the style that Welch embraced as a "horse race," where several potential successors are groomed at once for the succession. Also see Tichy, *Succession*, 29-30. Tichy, *Succession*, 78, offers DuPont's succession as a contrast to GE's "horse race" succession platform. He quotes Chad Holliday (CEO appointed in 1998): "Our goal was zero rivalry. Rivalry is destructive. We knew we wanted them [CEO succession candidates] to work together when it was over."

[102]Ibid., 87.

[103]Ibid., 90.

[104]Ibid., 95.

[105]Ibid., 96.

In his chapter entitled *CEO Role in the Succession Pipeline: The Paradox of Power*, Tichy encourages that the CEO determine not to create drama, collaborate with the CHRO and the board, and initiate the succession process.[106] In summary, he champions a strong, intentionally built leadership pipeline which comes through mentoring and investing in future leaders. Tichy champions not causing drama during the process while working with others of influence to make sure that succession is successful. Though from a secular vantage point, Tichy offers elements of teams, decreasing so others can increase, and mentoring (discipleship) as marks of a successful transitioning leader. Having looked at Tichy's work, the final book from the marketplace to be highlighted is *Transitions at the Top*, by Ciampa and Dotlich.

Ciampa and Dotlich: *Transitions at the Top*

Ciampa and Dotlich offer a solution to the current low success rate of transitions.[107] They call for the board to be accountable for the continuity of leadership and address "how the incumbent CEO should direct the entire sequence of activities that lead to a handoff of authority, ensure all pieces of the puzzle fit together, and ensure his successor has the best chance to succeed while handling the necessary task of his own exit."[108] Specifically, the CEO is to 1) design and implement the transition process and 2) believe that the success of the person who next steps into the CEO role is the final objective of his watch. The authors acknowledge the second goal can be achieved by becoming a counselor or instructor of the incoming successor.[109] The authors note that

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[106]Tichy, *Succession*, 103-24.

[107]Dan Ciampa and David L. Dotlich, *Transitions at the Top: What Organizations Must Do to Make Sure New Leaders Succeed* (Hoboken, NJ: Jossey-Bass, 2015).

[108]Ibid., 1.

[109]Ibid., 13-14.

one of the imperatives for the CEO to succeed in the endeavor to transition leadership is

"the CEO's own self-management and self-awareness as she passes the mantle of

authority to her successor."[110]

In discussing failure of transition in correlation to mentoring and coaching

(discipleship) CEOs, the authors note:

> From the data on the high amount of failure in transitions at the top, however, the evidence is that many boards are not on track to earn congratulations. There is a clear need to do better. Convincing evidence comes from incoming CEOs who have reported that they are not getting the support they need or getting it for as long as they need it. In a study of 23 major CEO transitions, 57 percent of CEOs promoted from inside and 83 percent from outside said they believe their boards were 'less involved' than they should have been. In other words, a lot of new leaders are left to navigate transitions on their own, with the board remiss in its duties. To be sure, many new leaders struggle their way to success and come out just fine, but the question is, how much potential value is lost in the meantime? And, of course, as we explained in the Introduction, a large percentage of senior-level transitions fail with high cost for the company and the individuals involved.[111]

In examining failed transitions, Ciampa and Dotlich note the inability of the

CEO and successor to form a positive relationship. The authors write, "But when a careful

autopsy is done, there is often another reason that lies even deeper in the root of the

problematic handoff – the inability of the CEO and the successor to form a positive

relationship."[112] The authors also note the propensity of leaders to take on a hero complex:

"Many develop the self-concept of the hero because of their accomplishments."[113] In

discussing this unique challenge, they note two barriers. "The first is 'heroic stature,' the

special place the leader believes he occupies apart from and above others. . . . The second

barrier that must be overcome is 'heroic mission,' or the belief that the leader embarked

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[110]Ciampa and Dotlich, *Transitions at the Top*, 14.

[111]Ibid., 126.

[112]Ibid., 173.

[113]Ibid., 174.

on an epic quest that he is uniquely qualified to achieve."[114] In summary, Ciampa and

Dotlich address the need for mentoring and coaching incoming CEOs, the unique hero

complex that CEOs face, and the importance of the CEO being at the helm of the transition

process, whether relationally or directionally. Many of the same themes addressed by

Tichy and even Goldsmith are picked up and continued in this helpful conversation,

which leads to a synthesis of these three works.

Synthesis of Goldsmith, Tichy,
Ciampa, and Dotlich

Goldsmith calls for transitional leaders to embrace humility while learning to

be a fan of their successors. Goldsmith also points to intelligence, integrity, and the

intentional development of others. Tichy calls for development of leaders (a "leadership

pipeline") in the form of coaching and mentoring. Ciampa and Dotlich champion the

ideal of developing leaders as well as decreasing so that successors can succeed. Ciampa

and Dotlich also offer self-management and self-awareness as important traits of a

successful transitional leader. Table 6 offers a synthesis of becoming traits from

Goldsmith, Tichy, and Ciampa and Dotlich.

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[114]Ciampa and Dotlich, *Transitions at the Top*, 174.

Table 6. Synthesis of becoming traits from Goldsmith, Tichy, and Ciampa and Dotlich

	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait – Drawn from the Literature
Are You Ready?	Humility vs. Ego or an inflated sense of importance (p. 34) Trustworthy (33-44/1285 Kindle loc.) Integrity Intelligence Hard worker Commitment (p. 85)		Humility Trustworthy Integrity Intelligence Hard worker Commitment
		Position others for success vs. Go out with a bang Coaching (p. 24)	Humility, Sacrificial, Others- centered Disciple-maker
Succession		Develop a CEO pipeline (p. 90) Determine not to create drama (p. 103-124)	Disciple-maker Humility, Kindness, Team player
Transitions at the Top	Counselor/instructor (p. 13-14) Self-management/self-awareness (p. 14) Humility vs. Hero complex (p. 174) Humility vs. Heroic mission complex (p. 174)		Disciple-maker Emotional intelligence Humility, Awareness Humility, Team player
		Establish positive relationship with successor (p. 173)	Kind, Team player

Published Articles

Transitioning from books that inform the discussion on transition, the conversation now examines published articles that touch on transition. Goldsmith, in "4 Tips for Successful Succession Planning" (2009), offers the following tips for successful succession planning: changing the name from succession planning to succession

development, measuring outcomes, keeping it simple, and remaining realistic.[115]

Indicative of many articles on transition, the trajectory of this article has little focus on who a transitional leader should be in order to be successful; Goldsmith focuses on the plan or the culture of the succession plan.

Charan, in "Ending the CEO Succession Crisis" (2005), states,

> Almost half of companies with revenue greater than $500 million have no meaningful CEO succession plan, according to the National Association of Corporate Directors. Even those that have plans aren't happy with them. The Corporate Leadership Council (CLC), a human-resource research organization, surveyed 276 large companies last year and found that only 20% of responding HR executives were satisfied with their top-management succession processes.[116]

Charan offers three solutions to the CEO succession crisis. First, companies need a deep pool of internal candidates that are being developed. Second, boards need to continue to update and redefine succession plans. "Finally, directors considering outside candidates should be exacting, informed drivers of the executive search process, leading recruiters rather than being led by them."[117] Charan calls for a leadership pipeline, insider success (versus bringing in an outsider), the "fit" imperative, and a high level of intentionality in all aspects of the succession process as necessary to ensure successful succession. Again, little is said about the character or leadership traits of the transitioning CEO. It seems that the business world relies on boards and HR departments to influence the succession process. This may be due to the nature of turnover of CEOs who are often ushered to the door with a golden parachute in hand.

> In North America, 55% of outside CEOs who departed in 2003 were forced to resign by their boards, compared with 34% of insiders, Booz Allen reports. In Europe, 70% of departing outsiders got the boot, compared with 55% of insiders.

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[115]Marshall Goldsmith, "4 Tips for Efficient Succession Planning," *Harvard Business Review*, May 12, 2009, accessed July 1, 2016, https://hbr.org/2009/05/change-succession-planning-to.

[116]Ram Charan, "Ending the CEO Succession," *Harvard Business Review*, February 2005, accessed July 1, 2016, https://hbr.org/2005/02/ending-the-ceo-succession-crisis.

[117]Ibid.

Some outside CEOs are barely around long enough to see their photographs hung in the headquarters lobby. Gil Amelio left Apple 17 months after he arrived from National Semiconductor. Ex-IBMer Richard Thoman was out of the top spot at Xerox after 13 months. David Siegel gave up the wheel at Avis Rent A Car for US Airways but departed two years later. Even under the best circumstances, CEO selection is something of a batting average: Companies will not hit successfully every time.[118]

In 2015 Per-Ola Karlsson recorded a shift in "Why CEOs Don't Get Fired as Often as They Used To." She affirms the board of directors' influence over the transition plan and the industry's intentionality to have successful CEO handoffs. Karlsson writes,

> The reduction in forced successions indicates that boards of directors have become significantly more practiced at selecting the right chief executives, and planning and executing smoother transitions from one to the next. From 2000 to 2008, the average number of planned successions as a percent of turnover events per year (excluding turnover events resulting from M&A) was only 63%. But from 2009 onward, the percentage of planned successions has steadily increased, to a record 86% in 2014. Forced turnovers have become much less common. In 2004, for example, 37% of departing CEOs were forced out, but in 2014, that figure had fallen to 14%.[119]

Karlsson notes that this change has been driven by the business world's understanding of the cost of failed transitions. The author records, "We quantified these costs in Strategy's annual Study of CEOs, Governance, and Success, which estimated that companies that fire their CEOs forgo an average $1.8 billion in shareholder value compared with companies that have planned successions."[120] Karlsson's article, similar to Goldsmith's and Charan's articles, focuses on the succession process but gives little

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[118]Charan, "Ending the CEO Succession."

[119]Per-Ola Karlsson, "Why CEOs Don't Get Fired as Often as They Used To," *Harvard Business Review*, June 12, 2015, accessed July 1, 2016, https://hbr.org/2015/06/why-ceos-dont-get-fired-as-often-as-they-used-to.

[120]Ibid. Karlsson notes,
In 2004, the global rate of successions at the world's 2500 largest companies was 14.7%, and the spread between the lowest regional rate (North America, at 12.8%) and the highest (the BRIC countries, 23.9%) was more than 11 percentage points. In 2014, the global rate of successions was slightly lower, at 14.3%, but the spread between the highest (other emerging countries, 15.9%) and the lowest (North America, 13.2%) had fallen to less than three points.

attention to the role of who the CEO should be or even the part they should play. Table 7, below, provides a synthesis of becoming traits from Goldsmith, Charan, and Karlsson.

Table 7. Synthesis of becoming traits from Goldsmith, Charan, and Karlsson

	Example of a Successful Transition Practice	Potential Becoming Trait—Drawn from the Examples in the Literature
Goldsmith	Succession development	Disciple-maker
Charan	Leadership pipeline	Disciple-maker
Karlsson	Board oversight	Humble, Team player

Synthesis of Published Articles

From the standpoint of published articles, little has been written about the profile of a successful transitioning leader. While there are similarities between CEOs and pastors (for example, both are called to lead within succession), it seems that their contexts are worlds apart.[121] What do seem to be consistent themes for those at the helm in both the secular and sacred worlds are the need to develop a strong pipeline of future leaders, the need to engender robust relational connectivity with incoming leaders through mentoring or coaching, and the willingness to work within the context of a team to ensure a successful transition.

Profile of the Current Study

The precedent literature has established the reality of the conversation surrounding pastoral succession and has pointed to a void in the literature—specifically the need for greater research to be focused on identifying the traits of a successful transitioning pastor versus the best practices to engage in during a pastoral transition.[122]

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[121]Karlsson's says the power of transitioning leadership lies in a strong board versus the exiting CEO.

[122]Once the traits of a successful transitioning pastor have been identified, they can be measured and improved. These traits will also inform best practices for leadership transition.

In addition, this chapter has laid out three levels of transitional leadership: leading by proclaiming, leading by becoming, and leading by empowering. It has been established from the literature that there is a general call for transitional leaders to lead by proclaiming or engaging in the conversation of pastoral succession but no attention has been given to the traits of a successful transitioning pastor. This work has surveyed and synthesized the current literature to identify potential threads of character traits that successful transitional leaders must appropriate or become.[123] Appendix 2, provides a summary of becoming traits in the far right column gleaned from the current literature.

A compilation of traits of successful transitional leaders from the current literature consists of the following twenty-seven characteristics: disciple-maker, secure, humble, kingdom-focused, encourager, trustworthy, mentor, good sense of humor, sacrificial, wise, coach, team player, person of prayer, person of integrity, team-oriented, compassion, transparent, approachable, hard working, learner, called, intelligent, tenacious, selfless, kind, emotionally intelligent, and personally aware.[124]

These twenty-seven traits of a successful transitional leader arise directly out of the literature. While comprehensive, these traits are not necessarily exhaustive, as the literature does not directly seek to establish the traits of a successful transitional leader.[125]

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[123]See appendix 1 for potential reflective statements for transitioning pastors, distilled from the current literature, that denote aspects of the potential character traits that successful transitional leaders ought to manifest.

[124]The characteristic of kingdom-focused or kingdom-minded need to be further clarified.

[125]In seeking a transitional leadership profile, this research hypothesizes that a successful transitioning pastor will be more concerned about becoming the right transitioning leader than implementing a successful succession plan. It is surmised that successful transitioning pastors avoid blind spots that are present in pastoral leadership. While pitfalls are immeasurable, a few spell doom for a pastoral transition: being church-focused vs. kingdom-focused; clinging to "top-down" leadership vs. shared power through the leveraging of a team; seeking temporal power, privilege, prestige (personal gain) vs. losing for the sake of eternal gain; investing in programming (the organization, numbers, nickels, noses) vs. people (disciple making); and embracing the philosophy that "leadership is everything" vs. focusing on a "followership first" ethic, which may dictate leaving an organization. Any of these pitfalls have the ability to derail a succession, and are also inextricably linked to the character of the transitioning pastor. Qualities such as character and principle should lead actions (foresight and implementation of a succession

For simplicity it could be argued that these traits fall into four broader, yet distinctive categories: a transitioning leader must (1) be kingdom-minded, (2) leverage teams while empowering others, (3) embrace followership, and (4) engage in disciple making or development of a leadership pipeline.[126]

It is helpful to define these four broad categories. The term *kingdom-minded* reflects the desire of a transitional leader to look beyond themselves and their immediate circumstances in order to see God's desire to work in the world around them, specifically His will and the realization of His kingdom in the present age. Many pastors are successful when it comes to building a church, but are myopic in their vision for kingdom work beyond their own gain or the gain of their church. A potential pitfall of "building a church" is missing the broader vision of the kingdom. Three questions may be asked: "Are pastors as leaders more susceptible to a myopic view of the kingdom because 'their'

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plan), and the aforementioned qualities should see actions to completion. Criswell, Driscoll, and the pastor of Coral Ridge Presbyterian all reflect different aspects of failed transition plans. There is great need for a transitional leadership profile, lending direction to how leaders can become transitional leaders. Once character and principles are in place, a leader can then implement best practices that aid successful transitions. The west is enamored with leadership. The business world is enamored with leadership and the *success* that it brings. How this impacts pastoral ministry leadership philosophies is frightening. While books on leadership fly off the shelf, the New Testament philosophy of followership is little talked about. Those who find themselves in positions of Christian leadership would be wise to direct greater energy toward what biblical followership demands, reproduction of kingdom-minded individuals who make disciples. Many leaders within the church excel at being a visionary CEO-type, and yet engage in limited discipleship. The discipleship viewed here is intentional spiritual formation and development of specific individuals over time (e.g., Jesus invested three years with His disciples and Paul invested in Timothy and Titus). It could be rightly stated that directional leaders who succeed in building a large church but fail to reproduce themselves through discipleship stand to reap the reward of the loss of legacy. It is not inconceivable that a pure CEO profile type in the pastoral role who ignores discipleship can fully experience a successful transition.

[126]The concept of being "kingdom minded" has been established by others such as Michael Miller, J. D. Greear, and Albrey Malphurs. Michael Miller, *The Kingdom Focused Leader: Seeking God at Work in You, through You, and around You* (Nashville: B & H, 2004), has focused on the need for a Christian leader to practice constant awareness that the kingdom of God works in, through, and around all Christians. J. D. Greear, *Gaining by Losing: Why the Future Belongs to Churches That Send* (Grand Rapids: Zondervan, 2016), has focused on the need of letting go of resources (both human and financial capital) in order to engage in church replication. Aubrey Malphurs, *Look Before You Lead: How to Discern and Shape Your Church Culture* (Grand Rapids: Baker, 2013), has focused on the need of understanding unique church cultures for the sake of kingdom gain.

church becomes their kingdom?" "Is a team of leaders a more optimal choice of leadership in contrast to one strong visionary leader in light of spiritual gifts in the body?" "Are directional leaders capable of laying down their position in a holistic way to make way for their successors; are they capable of following?"

The term *team* is better understood through the action of embracing team is seen when a transitional leader shares power and leverages teamwork. The ideal of teams in varied context has been extensively explored by authors such as Hackman (*Leading Teams)*, MacMillan (*The Performance Factor*), Edmondson (*Teaming*), Willink and Babin (*Extreme Ownership*), Lencioni (*The Five Dysfunctions of A Team*), and Cladis (*Leading the Team-Based Church*).[127]

The term *followership* is highlighted in Rusty Ricketson's work, *Follower First.* One of Ricketson's observations of followership surrounds John 3:30, where John the Baptist in a prophetic leadership context declares that he should decrease and Christ should increase. Jesus, while often viewed as the ideal leader, can also be seen as a follower in that His primary mission on earth was to fulfill the will of His Father (Jn. 6:34, 10:30). Applied to the pastoral transition, it is a leader who is willing to decrease aspects of his leadership so that others around him may increase their leadership. This intentional diminishment of leadership will eventually move the transitional leader into a follower role behind the new leader.[128]

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[127]Richard J. Hackman, *Leading Teams: Setting the Stage for Great Performances* (Boston: Harvard Business Review Press, 2002). Pat MacMillan, *The Performance Factor: Unlocking the Secrets of Teamwork* (Nashville: Broadman & Holman, 2001). Amy Edomondson, *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy* (San Francisco: Josey Bass, 2014). Jocko Willink and Leif Bain, *Extreme Ownership* (New York: St. Martin's, 2015). Patrick Lencioni, *The Five Dysfunctions of a Team: A Leadership Fable* (San Francisco: Jossey-Bass, 2002). George Cladis, *Leading the Team-Based Church: How Pastors and Church Staffs Can Grow Together into a Powerful Fellowship of Leaders* (San Francisco: Jossey-Bass, 1999).

[128]Ricketson, *Follower First*.

Table 8 shows the twenty-seven distilled characteristics and their relationship to four broader categories.

Table 8. Traits in relationship to categories

Necessity of the 27 Traits from the Literature in relationship to Four Broad Categories					
#	27 Traits from Literature	Broad Categories			
		Kingdom-focused	Team Oriented	Embracing Followership	Engaging in Disciple-making
1	A Good Sense of Humor				
2	Approachable	Needed	Needed	Needed	Needed
3	Called	Needed	Needed	Needed	Needed
4	Coach		Needed		Needed
5	Compassion	Needed		Needed	Needed
6	Disciple-maker	Needed	Needed	Needed	Needed
7	Emotional Intelligence				
8	Encourager		Needed		Needed
9	Hard Working	Needed	Needed	Needed	Needed
10	Humble	Needed	Needed	Needed	Needed
11	Intelligent				
12	Kind				
13	Kingdom Focused	Needed			Needed
14	Learner	Needed	Needed	Needed	Needed
15	Mentor		Needed		Needed
16	Person of Integrity	Needed		Needed	Needed
17	Person of Prayer	Needed		Needed	Needed
18	Personal Awareness				
19	Sacrificial	Needed	Needed	Needed	
20	Secure		Needed	Needed	Needed
21	Selfless	Needed	Needed	Needed	Needed
22	Team Oriented	Needed	Needed		
23	Team Player	Needed	Needed		Needed
24	Tenacious				
25	Transparent	Needed	Needed	Needed	Needed
26	Trustworthy	Needed	Needed	Needed	Needed
27	Wise	Needed	Needed	Needed	Needed

The general nature of some of the character traits, such as a good sense of

humor, emotional intelligence, intelligent, kind, personal awareness, and tenacious, made

them difficult to assign to a category. It could be argued that these traits either conform or

do not conform to the categories. For example, a good sense of humor is not necessary to

be kingdom-minded, but it could be argued that if one is kingdom-minded, he will have a

good sense of humor. Future research based on the findings of this expert panel may

provide more categories that would be a better fit for these character traits.

The term *disciple-making* can vary in definition. In this context, disciple-

making is being viewed primarily in the biblical sense of Matt. 28:19-20 and 2 Tim. 2:2,

where there is an intentional spiritual investment in order that the individual invested in

may replicate and invest in another spiritually, specifically in their pursuit of Christ for

kingdom gain.[129] In a broader secondary context, disciple-making would also apply to a

transitioning pastor not only investing in a spiritual sense but in for leadership

development through the depositing of their experience and wisdom into a faithful,

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[129]Pastors often see their primary tool for disciple-making as being their responsibility to preach. While the proclamation of the Word within a local congregation is the necessary role of a pastor, the definition in view for disciple-making seeks to move beyond preaching, a one-way dialogue, to intentionally investing one's life in two-way dialogue, resulting in life change, spiritual reproduction, and kingdom gain in the life of the disciple. In "Dynamics of Church Planting Movements: Lessons from History," accessed February 4, 2018, https://noplaceleftworldcom.files.wordpress.com/2016/02/movement-models-wesley-whitefield.pdf, 2-3, the contrast of the historical ministry impact of George Whitefield and John Wesley is insightful in supporting the ideal of disciple-making being more than preaching:

> The most significant difference between these two revival preachers is probably the difference in their legacy. George Whitefield is remembered for his intense spiritual life and his loud voice, for telling captivating stories that filled his sermons, for open-air or "field preaching", and for the large numbers of people impacted by his persuasive preaching. All these however died when he did [sic]. Whitefield did not mentor or apprentice revival preachers so there were not individuals who could carry on what he did. His lack of attention to what would survive him is also evident in the handling of the Bethesda orphanage in Savannah Georgia. Although he transferred the patronage to Lady Huntingdon in the UK she did not follow through, so that the institution fell on hard times and had to find its way apart from its benefactor. Whitefield set a high standard of what a revival preacher can do which has inspired others who came after him. Some of his sermons exist however the context into which they were delivered has changed. . . . By contrast, the Methodist denomination which sprung up around and after Wesley has over 12 million members at the time of this writing and a long history in the revival awakenings in American history.

available, and teachable man who would become either a pastor or spiritual leader in their niche of ministry service within the church for kingdom gain.[130]

Overview

While chapter 1 of this research was designed to identify a gap in the research regarding pastoral transition and the need for further study, chapter 2 moved to engage with the current literature to identify the gap in the literature and analyze valuable information to inform the research. This objective was accomplished through an overview of the four literature streams, synthesizing the main arguments and applications of each stream, and distilling traits of a successful transition.

The third chapter explains the research method that this dissertation applied to gather data from the literature and experts in the pastoral-leadership field. Chapter 3 discusses a general description of the research, research intentions, delimitations of the general study, research questions and population, limitations of the research, design, implementation, competencies, and research procedures. This study is a qualitative research study utilizing a three-round Delphi technique with an expert panel consisting of 10-12 individuals in order to gain a consensus as to characteristics of a transitional leadership profile for successful transitional pastors. The expert panel was comprised of individuals identified through (1) the literature review, (2) speaking directly with individuals who have experience in pastoral transition, and (3) influential figures within the Christian community. The fourth chapter analyzes and summarizes the research findings as they apply to the research questions. The fifth chapter examines the results of the data and identifies the weaknesses and strengths of the research. Chapter 5 also address how these findings impact the current and future conversation regarding pastoral succession as well as recommended areas of future study.

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[130]This broader context of disciple-making is well developed in Eric Geiger, *Designed to Lead: The Church and Leadership Development* (Nashville: Broadman and Holman, 2016).

CHAPTER 3

RESEARCH DESIGN

The purpose of this research was to seek the characteristics of successfully

transitioned pastors in order to develop a profile to guide pastors facing pastoral

succession. There is currently little written on pastoral transition. Current writing has

been limited to consultants or successfully transitioned pastors who are looking to share

their succession experience. It is logical that there is limited writing focusing on

unsuccessfully transitioned pastors as both their memory and their failed transitions are

quickly forgotten.[1] Ascertaining a population of transitioned pastors proved challenging

as denominations do little to track this data. What has received attention are the

transitions, either successful or failed, of a handful of high-profile pastors of well-known

churches.[2] Even successfully transitioned pastors are hard to track, as many of these cases

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[1]Recent literature has begun to focus on the church's need to engage more intentionally in succession planning, as well as individual examples of successful and failed leadership transitions. See William Vanderbloemen and Warren Bird, *Next: Pastoral Succession That Works* (Grand Rapids: Baker, 2014); Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions* (San Francisco: Jossey-Bass, 2004); Bob Russell and Bryan Bucher, *Transition Plan: 7 Secrets Every Leader Needs to Know* (Louisville: Ministers Label, 2010); Joel Gregory, *Too Great a Temptation: The Seductive Power of America's Super Church* (Fort Worth: Summit Publishing, 1994); Tom Dale Mullins, *Passing the Leadership Baton: A Winning Transition Plan for Your Ministry* (Nashville: Thomas Nelson, 2015). While a theology of pastoral succession has been explored in Lascallett and Stepp, no focus has been given to the pastor's need to identify and embrace the characteristics of a leader style or profile that allow for successful transitions. See Dave Lescalleet, *Transition: Developing a Theology of Pastoral Succession* (Seattle: Amazon Digital Service, 2013). P. L. Stepp, *Leadership Succession in the World of the Pauline Circle*, New Testament Monographs 5 (Sheffield, England: Sheffield Phoenix, 2005). Scott Thumma, Dave Travis, and Rick Warren, *Beyond Megachurch Myths: What We Can Learn from America's Largest Churches* (San Francisco: Jossey-Bass, 2007).

[2]In pastoral succession, proclamation of pastoral transition is the first step, which leads to the eventual leadership transition. Yet, successful implementation of a transition plan requires the right leader. The current conversation regarding pastoral transition has highlighted well two of the three aspects implemented by transitional pastors: proclaiming transition and methodologies that facilitate transition.

have not been documented. For these reasons, this research utilized a Delphi study with

an expert panel in order to produce solid data, which identifies the characteristics and

qualities of successfully transitioned pastors.[3]

        This chapter explains the research method that this study applied to gather data

from the literature and experts in the field of pastoral leadership transitions. This chapter

also offers a research design overview, research questions, population, sample,

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While the current literature contains hints to the traits of a successful transitioning leader, these traits have yet to be systematically identified. These traits, the convictions, character, and competencies of a successful transitional leader, identified in this study, will allow an individual to measure current aptitude and seek to develop in identified areas of need. Embracing the traits that allow transitional leaders to be successful is important. Transitional leaders who proclaim the vision of transition and become the right transitional leader will ultimately be the best equipped to empower others toward a successful transition.

        [3]In seeking a transitional leadership profile, this research hypothesized that a successful transitioning pastor will be more concerned about becoming the right transitioning leader than implementing a successful succession plan. It was surmised that successful transitioning pastors avoid blind spots that are present in pastoral leadership. While pitfalls are innumerable, a few spell doom for a pastoral transition: being church-focused vs. kingdom-focused; seeking temporal power, privilege, prestige (personal gain) vs. losing for the sake of eternal gain; clinging to "top-down" leadership vs. shared power through the leveraging of a team; investing in programming (the organization: numbers, nickels, noses) vs. people (discipleship); and embracing the philosophy that "leadership is everything" vs. focusing on a "followership first" ethic, which may dictate leaving an organization. Any of these pitfalls could derail a succession. They also are inextricably linked to the character of the transitioning pastor. Qualities such as character and principle should lead actions (foresight and implementation of a succession plan), and the aforementioned qualities should see actions to completion. W. A. Criswell, Mark Driscoll, Tullian Tchividjian (the pastor of Coral Ridge Presbyterian and successor to D. James Kennedy), all reflect different aspects of failed transition plans. There has been great need for a transitional leadership profile lending direction to how leaders can become transitional leaders. Once character and principles are in place, a leader can then implement best practices that aid successful transitions. The West is enamored with leadership. The business world especially is enamored with leadership and the *success* it brings. How success impacts pastoral ministry leadership philosophies is frightening. While books on leadership fly off the shelf, the New Testament philosophy of followership is little talked about. Those who find themselves in positions of Christian leadership would be wise to direct greater energy toward what biblical followership demands. One can argue that the American church is more interested in building the church along the lines of a corporation with all of the material benefits, instead of the reproduction of kingdom-minded individuals who make disciples. Many leaders within the church excel at being a visionary, CEO-type, and yet engage in limited disciple-making. The disciple-making viewed here is intentional spiritual formation and development of specific individuals over time (e.g., Jesus invested three years with His disciples and Paul invested in Timothy and Titus). It could be rightly stated that directional leaders who succeed in building a large church but fail to reproduce themselves through disciple-making stand to reap the reward of the loss of legacy. It is not inconceivable that a pure CEO profile type in the pastoral role who ignores disciple-making can fully experience a successful transition. A potential pitfall of "building a church" is missing the broader vision of the kingdom.

delimitations, research assumptions, limitations of generalization, instrumentation, design, implementation, competencies, and research procedures.

Delphi Overview

In brief, the Delphi method is a systematic survey technique that relies on a panel of experts. The experts answer questionnaires in two or more rounds. After each round, a facilitator provides an anonymous summary of the experts' forecasts from the previous round as well as the reasons they provided for their judgments. The experts are encouraged to revise their earlier answers in light of the replies of other members of the panel. It is hoped that during this process the group will move toward a consensus which represents the best data. The process is stopped after a pre-defined stop criterion (e.g., number of rounds, achievement of consensus, or stability of results).

This study was a qualitative research study utilizing a three-round Delphi technique.[4] Skulmoski, Hartman, and Krahn describe the Delphi Method technique as

> an iterative process used to collect and distill the judgments of experts using a series of questionnaires interspersed with feedback. The questionnaires are designed to focus on problems, opportunities, solutions, or forecasts. Each subsequent questionnaire is developed based on the results of the previous questionnaire. The process stops when the research question is answered: for example, when consensus is reached, theoretical saturation is achieved, or when sufficient information has been exchanged.[5]

Rowe and Write are helpful in clarifying the Delphi technique as they offer four parameters for defining a procedure as "Delphi":

1. Anonymity of Delphi participants: allows the participants to freely express their opinions without undue social pressures to conform from others in the group. Decisions are evaluated on their merit, rather than who has proposed the idea.

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[4]According to Dalkey and Helmer (researchers known to have conducted the first Delphi study), the Delphi method finds "the most reliable consensus of opinion of a group of experts." Norman Dalkey and Olaf Helmer, "An Experimental Application of the Delphi Method to the Use of Experts," *Management Science* 9, no. 3 (1963): 458.

[5]Gregory J. Skulmoski, Francis T. Hartman, and Jennifer Krahn, "The Delphi Method for Graduate Research," *Journal of Information Technology Education* 6 (January 2007): 2.

2.   Iteration: allows the participants to refine their views in light of the progress of the group's work from round to round.

3.   Controlled feedback: informs the participants of the other participants' perspectives and provides the opportunity for Delphi participants to clarify or change their views.

4.   Statistical aggregation of group response: allows for quantitative analysis and interpretation of data.[6]

This research utilized an expert panel consisting of 14 individuals to gain a consensus of characteristics and traits of a transitional leadership profile for successful transitional pastors. Garson notes that the Delphi method is a research technique that uses a panel of experts to find consensus on subjective judgments.[7] Those that served on this panel met one of three primary categories. The experts either published in a meaningful way toward the conversation of pastoral leadership transition, were practitioners whose successful experience in pastoral leadership transition would establish them as experts in this field, or were a voice within the Christian community that is widely recognized as an expert in pastoral leadership. Examples of individuals to make up the expert panel who meet these primary categories are (1) individuals identified through the current literature addressing pastoral transition, those who have researched pastoral transition or successfully transitioned their pastorate and then written about their succession; (2) individuals who could insightfully contribute regarding pastoral succession, those who have successfully transitioned, have thought critically about

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[6]Gene Rowe and George Wright, "The Delphi Technique as a Forecasting Tool: Issues and Analysis," *International Journal of Forecasting* 15, no. 4 (1999): 354. Andre L. Delbecq, *Group Techniques for Program Planning: A Guide to Nominal Group and Delphi Processes,* Management Applications Series (Glenview, IL: Scott Foresman, 1975), 11, offers that the Delphi technique was designed

> (1) to determine or develop a range of possible program alternatives; (2) to explore or expose underlying assumptions or information leading to different judgments; (3) to seek out information which may generate a consensus on the part of the respondent group; (4) to correlate informed judgments on a topic spanning a wide range of disciplines; and (5) to educate the respondent group as to the diverse and interrelated aspects of the topic.

Also see John Beck Cartwright, "Best Practices for Online Theological Ministry Preparation: A Delphi Method Study" (Ed.D. thesis, The Southern Baptist Theological Seminary, December 2014).

[7]G. David Garson, *The Delphi Method in Quantitative Research* (Seattle: Amazon Digital Services, 2013), loc. 90, Kindle

pastoral transition, or are well-positioned to lend valuable thought to the conversation surrounding pastoral transition; and (3) influential figures, recognized church consultants or well-received contributors to current Christian thought.

It was desired that these experts also meet 2 out of 7 of the following secondary criteria for inclusion on the panel: (1) mega-church pastors who have transitioned, (2) consultants who have written on pastoral transitions, (3) individuals who have taken part in highly publicized or documented transitions, (4) experts in pastoral leadership, (5) mega-church pastors who are currently facing pastoral transitions, (6) clarion voices within the Christian community, and (7) denominational leaders who have high awareness of the inner workings of pastoral transition within their respective denomination.

The Delphi method is flexible in its application.[8] The number of rounds and participants can vary, driven by the degree of consensus desired by the researcher.[9] Skulmoski, Harman, and Krahn note, "Where the group is homogeneous, a smaller sample of between ten to fifteen people may yield sufficient results."[10] For this research, the number of participants achieved a desired homogenous panel.

Delphi Method Description
for This Research

The purpose of this research was to identify key characteristics and traits of successfully transitioned pastors. This research built on the results of the synthesis of the current literature relating to pastoral transition which resulted in 27 leadership

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[8]Gliddon records that the Delphi technique has been applied in over fifty previous competency studies spanning a wide range of populations and contexts. David G. Gliddon, "Forecasting a Competency Model for Innovation Leaders Using a Modified Delphi Technique" (Ph.D. diss., The Pennsylvania State University, 2006), 37.

[9]Chia-Chien Hsu and Brian A. Sandford, "The Delphi Technique: Making Sense of Consensus," *Practical Assessment, Research & Evaluation* 12, no. 10 (2007): 3.

[10]Skulmoski, Hartman, and Krahn, "The Delphi Method," 10.

characteristics. This research was conducted through a three-round Delphi study performed with 14 participants.[11] These participants were asked to respond to a list of open-ended questions pertaining to the 27 characteristics of transitional leadership distilled from the current literature. They were also afforded an opportunity to offer additional input as to relevant areas or ideas that have not been addressed through these questions.

Prior to the first round of the study, these questions were tested with two individuals, similar to the experts, to develop greater clarity and relevance of the questions. Once the study began, individuals were able to see the answers of the other participants after each round of surveying and were offered an opportunity to revise their prior answers.[12] Participants were kept anonymous. The expert panel was provided an opportunity to add to the list of characteristics leading to successful pastoral transition, offer helpful insights that has not yet been raised regarding characteristics tied to transitioning pastors, and provide any literary support that they deemed relevant to any of the questions asked.

Once received, revised answers and information were analyzed. Responses were grouped according to emergent themes and serve as content for the second round of survey. The survey questions in the second round utilized a four-point Likert scale. Results were collected and analyzed producing standard deviation and mean. Round 2 was designed to move respondents toward consensus. Once collected, second round survey responses were provided to respondents, and they were then able to compare their answers to the group's answers. Individuals who fell outside of consensus were able either to justify their position or to change their position and join the consensus.

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[11]Participants in the expert panel who gave permission for their names to be shared after the research had been completed are listed in appendix 3.

[12]Revision is a consistent practice in Delphi studies. See Hsu and Sandford, "The Delphi Technique," 2.

Questions whose answers achieved consensus were the foundation of round 3. Questions falling outside of consensus were documented and discussed. Consensus was achieved when 70 percent of the panel rate an answer 3 or higher on a 4-point scale.[13]

Once data from round 2 was gathered and analyzed a final survey, arising from questions which had achieved consensus, was given utilizing a dichotomous scale. This third round of survey sought consensus for a final time regarding the determination of the qualities and characteristics of a successful transitioning pastor. As in the other surveys, results were sent back for comparison and potential revision. Respondents were able to compare their answers to the group's answers. Individuals who fell outside of consensus were able to either justify their position or change their position and join the consensus.[14] Cartwright notes, "This opportunity for reassessment and revision is characteristic of the Delphi technique."[15] Results were gathered and analyzed, and these findings are discussed in chapter 4. This research design is representative of a Delphi study which used three iterations, or rounds.[16]

This research was centered on two research questions as well as four sub-questions. They are as follows:

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[13]Statistically, 70 percent is an accepted benchmark for research. See Cartwright, "Best Practices," 51; and Also Roy C. Schmidt, "Managing Delphi Surveys Using Nonparametric Statistical Techniques," *Decision Sciences* 28, no. 3 (Summer 1997): 765, 767.

[14]As noted previously, the rationale for not aligning with consensus should be supported by empirical research literature. The experts were given the opportunity to change their answers to match group consensus or provide rationale for not aligning with the consensus on the characteristics and traits of a successfully transitioning pastor.

[15]Cartwright, "Best Practices," 44. See also Hsu and Sandford, "The Delphi Technique," 2.

[16]James Neill, "Delphi Study: Research by Iterative, Consultative Inquiry," April 26, 2007, accessed August 3, 2017, http://www.wilderdom.com/delphi.html; Kenneth W. Brooks, "Delphi Technique: Expanding Applications," *North Central Association Quarterly* 53, no. 3 (January 1979); Skulmoski, Hartman, and Krahn, "The Delphi Method"; Harold A. Linstone and Murray Turoff, eds., *The Delphi Method: Techniques and Applications* (Reading, MA: Addison-Wesley, 1975); Rowe and Wright, "The Delphi Technique"; Ravonne A. Green, "The Delphi Technique in Educational Research," *SAGE Open* 4, no. 2 (2014); and Hsu and Sandford, "The Delphi Technique."

Research Questions

1. What are the common characteristics and traits that are manifested by a successful transitioning pastor?

2. What are the potential weaknesses in current leadership practices of pastors that lead to unsuccessful transitions in pastoral successions?

Sub-Questions

1. How might characteristics that embody kingdom-focus in a transitional leader allow for greater success in pastoral transitions?[17]

2. How does a transitional leader's view of teamwork and empowering others (shared leadership) impact the success of pastoral transitions?

3. How does an intentional philosophy of followership, decreasing so that others may increase, allow a transitional pastor to transition successfully?[18]

4. How does engagement in disciple-making help a transitioning pastor be a successful transitioning pastor?[19]

Population

Because the primary research question of this study sought to establish a consensus among experts regarding the discovered qualities and characteristics of successful transitional pastors, the population consisted of leaders and pastors who would

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[17]The term *kingdom-focus* can be contrasted to seeking temporal power, privilege, prestige (personal gain), which can be achieved in the context of a pastor focusing on building "his" church. The intentional denial of personal gain that can be achieved by iconic pastors within their own church setting is losing for the sake of eternal gain. John the Baptist's willingness to decrease personally for the sake of Christ increasing is an excellent example of being *kingdom-focused* (John 3:30).

[18]The term *followership* arises from Rusty Ricketson, *Follower First* (Cumming, GA: Heartworks, 2009), and John 3:30, where John the Baptist in a pastoral leadership context declares that he should decrease and Christ should increase. Applied to the pastoral transition, a leader who embraces followership is a leader willing to decrease aspects of his leadership so that others around him may increase their leadership. This intentional diminishment of leadership will eventually move the transitional leader into a follower role behind the new leader.

[19]The term *disciple-making* can vary in definition. In this context, disciple-making is being viewed in the biblical sense of Matt 28:19-20 and 2 Tim 2:2, where there is an intentional spiritual investment in order that the individual invested in may replicate and invest in another spiritually, specifically in their pursuit of Christ for kingdom gain. In a broader secondary context, *disciple-making* would also apply to a transitioning pastor not only investing in a spiritual sense but in for leadership development through the depositing of their experience and wisdom into a faithful, available, and teachable man who would become either a pastor or spiritual leader in their niche of ministry service within the church for kingdom gain.

qualify as experts in pastoral transition or successfully demonstrated leadership practices with pastoral leadership transition as the objective in view. Since the scope of this research was specifically aimed at pastoral transition, only leaders and pastors who were qualified to speak into pastoral transition were considered as part of the population. This Delphi study sought a homogeneous group of participants ideal for the specific nature of this study.

Sample

As noted before, the number of participants in a Delphi study can vary. Because this study sought a homogeneous group of participants, 14 participants were sufficient for this expert panel. Since experts were desired, a non-probability purposive sampling of church consultants, experts who had written on pastoral transition, as well as informed practitioners were utilized in this panel. The desired goal was to find 10-12 willing participants who qualified according to the criteria.

Delimitations of the Proposed Research

The delimitations of this study were three-fold: the current focus within the literature, the specific nature of the study, and the participants in the study. The first delimitation focused on the current literature. The current conversation surrounding the necessity of pastoral succession is a recent topic rising out of the advent of the megachurch and iconic Christian leadership, this study focused on literature from 2004 to the present.[20]

The second delimitation, the specific nature of this study, focused on successful pastoral transition. The nature of this investigation made it challenging for several reasons. First, while leaders transition every day in different sectors of the population, this study touched on the church and the successor as they related to the pastor who has transitioned

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[20]See Thuma, Travis, and Warren, *Beyond Megachurch Myths,* for helpful background on the megachurch and iconic Christian leadership.

away from his current position. Pastors who have no influence regarding their successor whether due to polity or lack of influence fell outside of the population of this study.[21] Second, pastoral transition caused by the untimely death or forced transition (firing) of a pastor were not the primary focus of this study as these pastors typically do not choose to transition or take part in their transitions. Third, this study focused on the profile of successfully transitioned pastors versus unsuccessful pastors.[22] Unsuccessful transitioning pastors were examined in contrast to those who are successful, but the research attempted to focus on what has worked in regard to transition as there are many factors which can influence leadership transitions.[23] While much writing focuses on the transition plan from the view of the church body or church governance, this study sought to focus specifically on the pastor who is transitioning away from the ministry, thereby limiting the reviewed literature to books written after *The Elephant in the Boardroom* (2004). Fourth, while there are a myriad of transitions that can be focused on for the purpose of case studies, it was assumed that each transition has its own unique factors. Therefore

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[21]This study focused primarily on literature surrounding pastoral transition, yet non-pastoral sources are appropriated when they have bearing on pastoral succession. The literature review in chap. 2 explored leadership transition in the corporate sector, which offered insight to pastoral transition.

[22]Pastors who have had the privilege of transitioning their ministry successfully and pastors who have been unsuccessful in transitioning their ministry are hard to quantify. For the sake of a leadership profile for successful transition, the sample population was tricky as it is susceptible to great human bias and there is very little statistical and comprehensive data regarding transition. Several factors gave rise to little data. First, every situation has confounding variables: a unique church (e.g., polity structure, culture), transitioning leader (e.g., giftedness, abilities, reasons for transition), and succeeding leader; therefore, it is difficult to drill down on specific characteristics of successful leaders to produce an accurate profile. Second, success is defined differently according to a participant's perception of the transition in view. There is always human bias in viewing transition. Those who have been successful may have had blind spots that were compensated for by their churches, colleagues, and mitigating circumstances, or they may take credit for successes that did not come from their actions or characteristics.

[23]Here it is acknowledged that successful and unsuccessful are relative terms. Success will be defined using Vanderbloemen and Bird's description: "Succession is when one senior leader intentionally transitions and hands over leadership to another," as well as the proviso that the impacted church retained its viability or gained greater momentum moving toward the future. Vanderbloemen and Bird, *Next*, 10.

this study's primary mechanism of research was an expert panel in a Delphi study.[24]

The third delimitation was the participants who were intentionally limited. As the stated purpose of this study was to identify the qualities and characteristics of a successful transitioning pastor, individuals who have studied, written extensively, speak knowledgeably, or are seasoned practitioners in the area of pastoral transition were selected to participate in the Delphi panel. Since this research was specifically designed to achieve consensus among a homogeneous panel of experts in successful pastoral transition, the population of experts being utilized in this research was limited to individuals who have studied, written extensively, speak knowledgeably, or are seasoned practitioners in the area of pastoral transition.

Having examined the three delimitations of this study, there were two research assumptions as well as two limitations of generalization for the research. The research assumptions and limitations of generalization were as follows:

Research Assumptions

1. The 27 identified and synthesized leadership characteristics and qualities ascertained from the current literature addressing leadership transition were sufficient and valid.

2. The Delphi study participants were able to thoughtfully and intelligently speak to the questions associated with this research.

Limitations of Generalization
of Research Findings

Given the intentional delimitations of this research, there was one primary area in which the results of the research may not be generalized. This research investigates successful leadership transition within the context of the pastorate; this research may not

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[24]Pastoral transitions that have been well documented were examined in chap. 2 to glean exemplary leadership characteristics.

generalize to other areas of leadership transition specifically in academia or the business sectors.

Methodological Design

This study was qualitative, specifically leveraging the use of a Delphi study and expert panel. The data collection was

1. Conducted in a Delphi study utilizing a panel of experts to create a transitioning leadership profile.[25]

Data analysis applied the following:

2. Looked for common characteristics and traits of successful transitional leaders (contrasted with characteristics that hinder successful transition) through a Delphi study.

3. Synthesized an overall leadership profile of a successful transitional leader and provided a framework and resources, in the form of a transitional leadership profile and diagnostic tools, to allow leaders to identify strengths and weaknesses within their own leadership skills thereby allowing them to seek growth in their ability to transition well.

Research Instrumentation

To create a leadership profile for pastors seeking to successfully transition their ministry roles, a panel of experts consisting of 14 key individuals was formed. Each of the experts on the panel was asked to take part in a three-round Delphi study.[26] These experts ranged from megachurch pastors who have successfully transitioned from their ministries to church consultants to seasoned and experienced pastors. Round 1 of the Delphi study aimed at collecting responses using open-ended questions. These responses

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[25]This profile was built on the research, distillation, and analysis of current written documentation and voices regarding pastoral leadership transition to discover leadership qualities and characteristics with an eye to a leadership profile of a successful transitioning pastor.

[26]All of the research instruments used in this dissertation were performed in compliance with and approved by the Sothern Baptist Theological Seminary Research Ethics Committee prior to use in the dissertation.

were utilized for a Likert-type survey in round 2. The results of round 2 were utilized for a dichotomous-scale survey in round 3.[27]

Content analysis was applied to responses of round 1 and themes were identified and outlined.[28] Similar themes were combined. Approximately 8-12 thematic statements were distilled for each major node from round 1 analysis. These thematic statements were used to set up Likert-type survey of round 2. Qualtrics survey software was used to administer and collect data for rounds 2 and 3.

The first round of this study was a document questionnaire e-mailed to the participants. Questions were developed from the four proposed categories: being Kingdom minded, sharing power (leveraging team), embracing followership, and engaging in disciple-making, which had been distilled from twenty-seven traits arising from the current literature addressing pastoral transition. In general, each question began with, "How can a pastoral leader in transition become a pastor who reflects . . . " and "What qualities or characteristics must a pastor in leadership transition exhibit in order to . . . ." In addition to the initial questions, there was a final question that gave participants an opportunity to supply insights that they felt were not addressed through the provided questions.

Before the round 1 questionnaire was administered, the questions were tested by two qualified experts in a pilot test. The purpose of this pilot test was to gain feedback regarding the clarity and viability of the questions. Once the pilot test was completed and questions were revised, the questionnaire was distributed to the participants. Participants responded to the questionnaire by giving their expert opinion

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[27]Cartwright, "Best Practices," utilized aspects of this approach to ascertain best practices in online theological ministry. The following research borrows heavily from Cartwright's design.

[28]Responses were combined into categories or nodes. For example, (1) kingdom-mindedness, (2) empowering teams, (3) willing to embrace an ethic of losing for the sake of gaining (embracing a philosophy of followership), and (4) engaging in disciple-making.

on every question provided. Last, participants were able to review and change their

replies in light of the responses from fellow anonymous participants. Responses were

grouped into four to five broad themes that were used throughout the entirety of the

study. These themes were used to organize or group the 27 characteristics of successful

transitioning pastors into overarching categories, allowing for greater synthesis and focus

of the current data. A strong example of this type of thematic grouping can be found in

Tim Smith's dissertation.[29] As established in chapter 2 of this research there were four

themes that presented themselves in the literature. They were being kingdom-minded,

sharing power (leveraging a team), embracing followership, and engaging in disciple-

making. The number of themes was malleable pending recommendations of other

characteristics from the expert panel.

Based on the analyzed responses of round 1, a survey was developed for round 2

utilizing Qualtrics as a survey tool. The object of round 2 was to discover where consensus

exists by giving participants the opportunity to rate the themes that emerged in round 1

using a Likert-type survey, ranking responses on a four-point scale of importance. An

example of a Likert-type survey on a four-point scale can be seen in Paul Green's research,

which set consensus at 70 percent of participants rating a response three or higher on a

four-point scale.[30] The same percentage was used for round 2 of this study. After feedback

for the round 2 survey was collected, participants were given an opportunity to revisit

their responses. In the cases where a survey item received consensus, participants who

are not in consensus were asked to specifically review their response and either justify

remaining outside consensus or shift their answer to join the consensus. Justification for

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[29]Tim Lee Smith, "Factors That Predict the Success of Christ-Centered Higher Education: A Mixed Method Study" (Ph.D. diss., The Southern Baptist Theological Seminary, 2015), 107-10.

[30]Paul Green, "The Content of a College-Level Outdoor Leadership Course," March 1982, accessed February 2, 2017, https://www.researchgate.net/publication/35126069_The_content_of_a_college-level_outdoor_leadership_course_for_land-based_outdoor_pursuits_in_the_Pacific_Northwest_microform_a_Delphi_consensus.

remaining outside the consensus could include published articles or writings that would support the participant's position outside the consensus or a greater treatment explaining why the participant, perhaps because of experience or conviction, chose to remain outside of consensus. This step was important to understanding why the expert chose to not fall within consensus.

In round 3 the same survey was given a second time excluding questions that fell outside of the consensus. For round 3, a dichotomous scale was used where the expert was asked to "agree" or "disagree." As in round 2, consensus in round 3 required 70 percent choosing "agree." The goal of round 3 was to reinforce consensus from round 2 as well as review, revise, and specify answers.

The Procedure

In round 1 of the study, there was a documented questionnaire that was e-mailed to the participants. Eight questions arising from the 27 distilled characteristics from the literature were developed using four broad categories: (1) kingdom-minded, (2) empowering teams, (3) willing to embrace an ethic of losing for the sake of gaining (embracing a philosophy of followership), and (4) engaging in disciple-making. In round 2, each statement or theme derived from round 1 utilized a Likert scale with a four-level rating: 1 – not at all important, 2 – somewhat important, 3 – important, and 4 – very important.[31] Relying heavily on the research design method employed by John Cartwright, this Delphi study followed what Skulmoski, Hartman, and Krahn described as "The Classical Delphi" which preserves the anonymity of the experts, utilizes an iterative process, controlled feedback, and a compilation of responses.[32]

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[31]See Cartwright, "Best Practices," 59.

[32]Skulmoski, Hartman, and Krahn, "The Delphi Method," 2.

Following Cartwright's research model derived from Conti, the following steps were taken:[33]

1. Experts were recruited to take part in the study. The purpose and the procedures of the study was discussed either by phone or e-mail with each potential participant. Each participant understood both the voluntary and anonymous nature of the study.

2. For each round of survey research, each participant read and acknowledged an informed consent as part of the survey, indicating that they understood the nature of the research, and their identities and responses would remain anonymous during the study.

3. Once pilot-tested, a free-form questionnaire was distributed to each participant and the participants were given seven days to respond to the questionnaire.

4. Anonymous results were collected and distributed to all panel members, giving an opportunity to revise their responses.

5. Revised responses were collected and analyzed for themes.

6. A four-point Likert-type survey was created.

7. The round 2 survey was distributed to the panel members with another ten-day timeframe for completing the survey.

8. The round 2 results were analyzed to discover where consensus existed among the experts. Consensus for round 2 was defined as 70 percent ranking a given answer 3 or higher on a four-point scale.

9. Anonymous results were collected and distributed to all panel members, giving each an opportunity to revise their responses. Those outside of the consensus on any given question were asked either to justify their position or consider joining the consensus.

10. A dichotomous agree/disagree survey was created by simply reducing the questions to only those which meet the threshold of consensus from round 2.

11. The round 3 survey was distributed to the panel members with a one-week time frame for completing the survey.

12. The round 3 results were analyzed to further finalize areas of consensus. Consensus for round 3 was defined as any responses with a 70 percent ranking of "agree."

13. Anonymous results were collected and distributed to all panel members, giving them an opportunity to revise their responses. Those outside of consensus were asked to

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[33]Cartwright, "Best Practices," 52-53. A strong example of the Delphi process to be followed can be found in Michael Conti's Best Practices research. Michael J. Conti, "The Online Teaching Skills and Best Practices of Virtual Classroom Teachers: A Mixed Method Delphi Study" (Ed.D. diss., University of Phoenix, 2012).

justify their position or consider joining the consensus. Additionally, respondents who choose to disagree with the consensus for round 3 were asked to justify their position or consider joining the consensus.

14. Once all findings were analyzed, conclusions were drawn based on the answers to the research questions, the contribution of the literature research, and recommendations for the application of the research in practice.

Conclusion

While chapter 1 of this research was designed to identify a gap in the research regarding pastoral transition and the need for further study, chapter 2 moved to engage with the current literature to identify the extent of the gap in the literature as well as glean valuable information to inform the research. Chapter 3 was designed to explain the research method that this study applied to gather data from the literature and experts in the pastoral leadership field. This chapter discussed a general description of the research, research intentions, delimitations of the general study, research questions and population, limitations of the research, design, implementation, and research procedures.

In summary, this was a qualitative research study utilizing a three-round Delphi technique with an expert panel consisting of 14 individuals in order to gain a consensus as to characteristics and qualities of a successful transitional pastor leading to the development of a transitional leadership profile for successful transitional pastors. Chapter 4 analyzes and summarizes the research findings as they applied to the research questions.

CHAPTER 4

ANALYSIS OF FINDINGS

The purpose of this research was to seek the characteristics of the successful transitioned pastor to develop a character profile that will guide pastors facing pastoral succession. To achieve this goal, a qualitative research study was conducted utilizing an e-Delphi study. This chapter describes how the gathered data, which related to the research questions, was compiled, analyzed, and summarized.[1] At the conclusion of the chapter, the methodology of the research are analyzed for its strengths and weaknesses.

Compilation Protocol

The research design applied in this study was a qualitative research study utilizing a three-round e-Delphi technique.[2] The first stage of this study involved sending open-ended questions to an expert panel. These open-ended questions sought to find the characteristics of a successful transitioning pastor. The second stage of this study utilized

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[1]The primary research question was, "What are the common characteristics and traits that are manifested by a successful transitioning pastor?" For the purpose of this study, the second research question was designed to reinforce the first research question. The second research question was, "What are the potential weaknesses in current leadership practices of pastors that lead to unsuccessful transitions in pastoral successions?" Then, four sub-questions sought to focus the primary research question into themes for greater clarity: (1) How might characteristics that embody kingdom-focus in a transitional leader allow for greater success in pastoral transitions? (2) How does a transitional leader's view of teamwork and empowering others (shared leadership) impact the success of pastoral transitions? (3) How does an intentional philosophy of followership, decreasing so that others may increase, allow a transitional pastor to transition successfully? (4) How does engagement in disciple-making help a transitioning pastor be a successful transitioning pastor?

[2]According to Dalkey and Helmer, researchers known to have conducted the first Delphi study, the Delphi method finds "the most reliable consensus of opinion of a group of experts." Norman Dalkey and Olaf Helmer, "An Experimental Application of the Delphi Method to the Use of Experts," *Management Science* 9, no. 3 (1963): 458.

a Likert scale allowing the expert panel to rank the importance of each characteristic given in the first stage of study. The third stage of this study applied a dichotomous scale to the characteristics which had gained consensus in the second stage of study.

The Expert Panel

Prior to the first stage of study, candidates for the expert panel were invited via e-mail invitation to take part in this research. The invitation letter explained the nature of the study, expressed the reason the recipient was being invited to be part of the expert panel, and laid out the time commitment required. The letter concluded by asking candidates to confirm their willingness to participate within seven days (see appendices 4, 5, and 6). Attached to the invitation were an abstract of the research as well as an expert panel commitment and timeline of the Delphi study to provide further detail for the potential participant (see abstract and appendix 9).

Of those invited to participate on the expert panel, 16 responded to the invitation and agreed to take part, and 15 completed the round 1 survey. The participants accepting the invitation consisted of both men and women and represented various denominational backgrounds.

The participant qualification survey requested that the individuals affirm their experience as experts who had written extensively on pastoral transition, were seasoned practitioners in the area of pastoral transition and leadership, or were insightful contributors to current Christian thought surrounding pastoral transition. Fifteen of the participants affirmed that they met the qualifications to be part of the expert panel in the survey given at the beginning of the first stage of research (see appendix 7).

To further verify the experience of the panel, each participant was asked to identify how many years of experience he or she had served in the areas of consultant, pastoral practitioner, or Christian leader. Collectively, the 14 experts who responded to this question had 421 years of experience with an average of 30.1 years experience with a

standard deviation of 6.1 years.[3] Table 9 below displays how the experts identified their experience and their total years experience.

Table 9. Experts' years of experience

Experts' Years of Experience as a Consultant, Pastoral Practitioner, or Christian Leader.	
Experts' Responses	Years of Experience
I pastored [a church] for forty years and transitioned to a successor eleven years ago.	40
Consultant- 15 years; pastoral practitioner - 25 years, Christian leadership - 38 years.	38
37 years of pastoral experience; 5 years as a church consultant; more than 2 years as a transitional pastor.	37
36 years as a pastor; 7 years in critical thinking of pastoral transition; 5 years as a recognized voice and author on transition; 4 years as a consultant in connecting with significant transitions; and 20 years as a denominational leader with high awareness of pastoral transitions.	36
33 years as a Church Consultant, 9 years as Elder 10 years as Church Program Staff employee.	33
Thirty years.	30
Thirty years.	30
About 30 years.	30
I've served as an ordained pastor for twenty-nine years. I transitioned to a senior leadership role twenty years ago at the church where I now serve.	29
Since 1991.	26
25 years as a researcher of pastoral leadership.	25
Consultant - 9+ years. Pastor - 15+ years.	24
I guess I started writing about 1994, have advised key churches in this area for last 15, beyond this area through my work at [a Leadership Organization] for 20 years have dealt with pastoral issues. Before that as an SBC associational missionary had to deal with this kind of thing weekly. My expertise though is really though, larger churches pastoral succession.	23
Twenty years.	20

The participant qualification survey also requested that the experts identify the specific qualifying parameters I required for participation on the expert panel. These qualifying parameters were (1) pastors who have transitioned successfully, (2) consultants who have written on pastoral transitions, (3) individuals who have taken part in highly publicized or documented transitions, (4) experts in pastoral leadership, (5) mega-church pastors who are currently facing pastoral transitions, (6) clarion voices within the

[3]The experts had a mode of 30 years of experience, a median of 30 years of experience, a minimum of 23 years of experience, and a maximum of 40 years of experience.

Christian community, and (7) denominational leaders who have high awareness of the inner workings of pastoral transition within their respective denomination. Table 10, below, displays how the candidates identified their qualifications to participate on the expert panel. All of the experts identified with two or more of the desired qualifiers.

Table 10. Expert panel qualifications

Expert Panel Self Identified Qualifiers		
Specific Qualification for Expert Panel Inclusion	Participants Identifying with Qualification	Percentage of Experts Identifying with Qualification
Recognized voice in the Christian community that can speak to pastoral transition.	12	85.7%
Expert in pastoral leadership.	8	57.1%
Written on pastoral transition.	8	57.1%
Successfully transitioned pastor.	7	50.0%
Currently thinking critically about pastoral transition.	7	50.0%
Connected to a well-known pastoral transition.	6	42.9%
Denominational leader with high awareness of pastoral transitions.	3	21.4%

Round 1

The first stage of the research was to conduct round 1 of the Delphi study. A free-form survey was created with seven open-ended questions for round 1 (see appendix 8). The seven open-ended questions were developed from the research questions in conjunction with themes arising from the current literature regarding pastoral transition. Question 1 focused on characteristics of successful transitioning pastors. Question 2 focused on characteristics of unsuccessful transitioning pastors. Questions 3-6 focused on the characteristics of four aspects of transitional pastors: kingdom-focused, team oriented, embracing followership, and engaging in disciple-making. Question 7 gave the expert opportunity to give additional input. Before the study was disseminated, a pilot study was conducted to address any issues in formatting and improve the survey

comprehension.[4] The pilot study proved helpful as it caused the researcher to specify in a clearer fashion that the outgoing pastor was the focal point of this study (e.g. appendix 8, second paragraph). After the pilot study was completed, round 1 free-form survey was finalized. Before the free-form round 1 survey was sent out, a welcome e-mail was sent to each expert thanking them for their willingness to participate and updating the expert that the survey would be delivered via the survey platform Qualtrics (see appendix 11).

Round 1, including the participant qualification survey, the free-form round 1 survey, and an instructional letter to round 1, which were all distributed via e-mail by Qualtrics (see appendices 8 and 12). Experts were given two weeks to respond to the free-form round 1 survey containing the three qualification questions and the round 1 survey containing seven open-ended survey questions. After both 72 and 96 hours had elapsed from the initial sending of the survey, those who had not completed the survey were sent reminders including a survey link by Qualtrics. These e-mail reminders requested the experts' participation in the first round of survey (see appendix 12).[5] A third and final reminder requesting participation and including a survey link was sent via personal e-mail before the end of the first round deadline (see appendix 13).

Of the 15 participants who completed the qualification survey, 14 experts responded to the seven open-ended survey questions. When a response was received from an expert, a thank you e-mail including instructions for reviewing the first round of data and guidelines for the second round of survey was sent to the participant (see appendix 14). After the initial responses of the 14 experts were collected, each expert had seven days to review their response as well as the responses of the other experts gathered in the first round survey (see appendix 15). This provided each expert an

[4]Gregory J. Skulmoski, Francis T. Hartman, and Jennifer Krahn, "The Delphi Method for Graduate Research," *Journal of Information Technology Education* 6 (January 2007): 4.

[5]Qualtrics, "Online Survey Software & Insights Platform," accessed August 31, 2017, http://www.qualtrics.com.

opportunity to adjust or amend their answers in light of the other experts' responses. Each document was carefully edited in order to protect the anonymity of each participant. After the deadline for adjusting and amending of answers passed and no edits had been requested, the researcher was free to analyze the data collected from first round of survey and then proceed to the second round of survey.

Once duplicate answers were consolidated the 14 experts had given 116 characteristics for a successful transitioning pastor. These characteristics were spread over five categories. Questions 1, 2, and 7 focused on characteristics that lead to successful transitions, blind-spots that lead to failure, and any additional input from the experts, and produced 38 characteristics. Question 3 identified traits for a successful transitioning pastor to be kingdom-focused and produced 19 characteristics. Question 4 sought the traits for a successful transitioning pastor to be team oriented and produced 21 characteristics. Question 5 targeted traits for a successful transitioning pastor to embrace followership and produced 18 characteristics. Question 6 asked for the traits causing a successful transitioning pastor to engage in disciple-making and produced 20 characteristics.

Round 2

Once the experts had been qualified and round 1 responses had been gathered and analyzed, the second stage of research, a Likert-type survey, was administered for round 2. Each expert consented to take the survey and anonymity was maintained throughout round 2. The round 2 survey was built on the research questions and experts' answers given to the research questions in round 1. As the survey questions in round 2 aligned with little deviation from questions in round 1, a pilot study was not deemed necessary.

Round 2 focused on general characteristics of successful transitioning pastors and four aspects of transitional pastors: kingdom-focused, team oriented, followership,

and disciple-making. In view of research question 2, the second question in round 2 asked for the expert to identify their top three traits of a successful transitioning pastor.[6] The round 2 survey contained six questions that were distributed via e-mail (see appendix 14). Qualtrics was used to create and distribute the round 2 survey.

The six questions in round 2 contained 116 characteristics (see appendix 15). Experts were asked in the round 2 survey to rate the importance of the 116 characteristics for a successful transitioning pastor. Five questions utilized a Likert rating scale (a four-level rating): 1 – not at all important, 2 – somewhat important, 3 – important, and 4 – very important. One question asked the expert to identify the top three important characteristics of a successful transitioning pastor.

The goal of the second round was to measure consensus regarding the characteristics with the greatest impact on the success of a transitioning pastor. Consensus was defined as 70 percent of participants selecting "3" (important) or higher.[7] Once experts' round 2 responses had been collected, a thank you letter was sent with instructions concerning review of round 2 results (see appendix 16). In consistency with round 1 of this research, all participants were presented with an opportunity to review and make changes to their responses given in light of the collective response of the other experts in round 2. Respondents who fell outside of consensus on a characteristic that achieved

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[6]Research question 2 states, "What are the potential weaknesses in current leadership practices of pastors that lead to unsuccessful transitions in pastoral succession?" Experts were asked in round 1 question 2 to identify characteristics of unsuccessful transitions and their corresponding qualities that overcame these blindspots. Question 2 of the round 1 open survey reads, "What are specific potential leadership blindspots of pastors that lead to unsuccessful transitions and which specific character traits or qualities overcome these blindspots?" In addition to the list of potential weaknesses that lead to unsuccessful transitions provided by the experts in round 1, question 2 in both rounds 2 and 3 seek to gain answers to research question 2.

[7]As noted in chap. 3 of this research, 70 percent is a statistically accepted benchmark for research. See John Beck Cartwright, "Best Practices for Online Theological Ministry Preparation: A Delphi Method Study" (Ed.D. thesis, The Southern Baptist Theological Seminary, December 2014), 51. See also Roy C. Schmidt, "Managing Delphi Surveys Using Nonparametric Statistical Techniques," *Decision Sciences* 28, no. 3 (Summer 1997): 765, 767.

consensus were asked to either join the consensus or give reasoning for remaining outside of consensus (see appendix 17).

Round 3

After the completion and analysis of round 2, which included an opportunity for participants to review and revise their responses, 92 characteristics had achieved consensus (70 percent of participants selecting "important" or higher). The third and final round of survey, a second iteration of the round 2 survey, was designed to drive consensus. Unlike the round 2 survey which used a Likert scale, round 3 used a dichotomous scale of "agree" or "disagree." For example, "Question 1 – The following character traits or qualities are important for a successful transitioning pastor," was followed by twenty-six consensus characteristics. Participants were asked to rate each characteristic with "agree" or "disagree." One additional question was given in round 3 requesting experts to rank in order the top 6 traits identified by the experts in round 2.[8] Each expert consented to take the survey and anonymity was maintained throughout round 3.

As in round 2, round 3 questions were based on the research questions. Round 3 focused on general characteristics of successful transitioning pastors and four aspects of transitional pastors: kingdom-focused, team oriented, followership, and disciple-making. The round 3 survey contained six questions which were distributed via e-mail with an introductory letter (see appendix 17). Qualtrics was used to create and distribute the round 3 survey. The six questions in round 3 contained 92 characteristics (see appendix 18). Experts were asked in the round 3 survey to agree or disagree regarding the importance of 92 characteristics on a successful transitioning pastor. Five questions

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[8]Traits identified by three or more experts in round 2 as being top three traits were used for the top six traits asked to be ranked in round 3.

utilized a Dichotomous scale ("agree" or "disagree"). In addition, experts were also asked to rank the top six characteristics of a successful transitioning pastor.

The goal of the third round was to gain greater consensus regarding the characteristics which impact the success of a transitioning pastor. Consensus was defined as 70 percent of participants selecting "agree." Once experts' round 3 responses had been collected, a thank you letter was sent (see appendix 18). In consistency with round 2 of this research, all participants were presented with an opportunity to review and make changes to their responses given in round 3 in light of the collective response of the other experts. Respondents who fell outside of consensus on a characteristic that achieved consensus were asked to either join the consensus or give reasoning for remaining outside of consensus (see appendix 18). A total of 12 participants completed the survey, and as expected, all 92 statements of the round 3 survey achieved consensus with at least 70 percent of the experts choosing "agree." Round 3 marked the conclusion of the Delphi study.

Summary of Findings

The following section offers a detailed display of the findings of this research as it pertains to each of the three rounds of research. Round 1 findings are a display of characteristics generated from a free-form seven-question survey completed by 14 participants. Round 2 findings are the result of duplicate answers from round 1 being consolidated and statistical analysis of a four-point Likert-item survey. Items that failed to meet consensus are identified and narrative explanations of experts who chose to remain outside of consensus are given. Round 3 findings demonstrate the results and statistical analysis of the dichotomous scale survey. Narrative explanations of experts as to their reasoning for remaining outside of consensus are given.

Round 1

        In order to discover the characteristics and traits of the successful transitioning pastor used to create the round 2 survey, a free-form survey was created for round 1 (see appendix 8). The seven open-ended questions were developed from a distillation of the twenty-seven traits of successfully transitioning pastors found in the current literature. After the pilot study was complete, the survey was e-mailed by Qualtrics to 16 participants. Question 1 focused on characteristics of successful transitioning pastors. Question 2 focused on characteristics of unsuccessfully transitioning pastors. Questions 3-6 focused on the characteristics of four aspects of transitional pastors: kingdom-focused, team oriented, embracing followership, and engaging in disciple-making. The last question gave the expert opportunity to give additional input. Table 11 provides round 1 responses given by the 14 experts who responded to round 1.

Table 11. Round 1 expert panel responses

Expert	Question and Response
	Question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?
1	Willingness to lay down their position
2	Humility – mission comes before ego and self Vision – to see the future of the church Generosity – willing to share friendships, relationships, credit, time and self to ensure the success of next pastor Systematic – strategically able to plan
3	A realistic self awareness, Perception about qualities needed in successor, enough humility to step out of the spotlight, a healthy trust in God's providence, a love for his flock more than self, patience to wait on the development of his successor.
4	Vulnerability, honesty, openness, gracious departure, positive support for the new Pastor.
5	Vision, humility, capacity for coaching others
6	Humility, humility, and more humility. The exiting pastor MUST exhibit consistent and authentic humility, as expressed in Philippians 2:1-11. Also, servanthood, leading by example, trustworthiness, Spirit-led, holy, and compassionate.
7	Commitment to leadership development, desire for the ministry to thrive after their departure, understanding that they are "interim" even if they've been there for years, ability to let go & no longer be in control, dream for their own next chapter
8	Honesty, humility, genuine concern, clarity, courage, optimism
9	Objectivity, vulnerability, flexibility and teachability; analytical
10	(1) Willingness to announce a definite retirement date one year in advance, (2) Willingness to lead in assembling the resources required of the succession process, (3) ability to live within appropriate boundaries both during and after the transition
11	Humility, flexibility, willingness to let go of authority, care for the good of the church, emotional maturity, responsibility,

Table 11 continued

12	Humility. Long-term vision. Security in themselves.
13	The outgoing pastor must be characterized by humility and intentionality: humility to release ministry into the hands of someone coming behind who will likely make changes, and intentionality to prepare the congregation to flourish under a new leader
14	Humility, vision for the future, leadership development capacity and desire

Question 2 - What are specific potential leadership blindspots of pastors that lead to unsuccessful transitions and which specific character traits or qualities overcome these blindspots?

1	Not including their spouse...hitting them in the head with this fact
2	Failure to recognize need to be in charge or to be recognized - pastors often think they are ready to transition but when the spotlight begins to turn elsewhere, the ego can consciously or unconsciously kick in to sabotage the transition - humility
3	Pastors underestimate the challenge a transition will be to their own egos. Overcome with daily humility. Pastors are too easily swayed by "friends" who later attempt to influence the transition plan. Overcome with decisiveness.
4	Denial, and lack of ownership of situations that impact the greater good of the congregation. Honesty, humility, awareness and willingness to work with conflicted areas.
5	Both underestimating and over estimating the importance of one's own role.
6	A failure to give up control and security. There is a need for the Executive Leader to trust God for both his future ministry and his future needs. This will be experienced if the Executive Leader is daily drawing near to God with an ever deepening spiritual formation.
7	Saying they've let go but really not doing so. Not having a clear, compelling vision of what God wants them to do next, blindness to
8	Strengths/weaknesses of their relatives if they're angling for family succession, insensitivity to their spouse's nee
9	A "one size fits all" mentality. That all churches and community cultures are alike. Teachability.
10	(a) Lack of honesty about problems that need to be addressed during the transition, (b) inability to articulate why the pastor is retiring. (c) lack of financial security after retirement (d) inability to live within boundaries before and after
11	Over controlling, unwillingness to let go of power and authority, too much ego tied into the identity of senior pastor role.
12	Lack of finance. Lack of avocation. Inability to let go. Unawareness of how much their identity is tied to their role.
13	Blindspots: being wedded to one's own vision for the church, taking change personally, seeing a new pastor as a threat. Traits that make a difference: humility, openness with the congregation beforehand about one's shortcomings and weaknesses.
14	Amazing communication not coupled with conviction for development

Question 3. What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?
The term kingdom-focused reflects the desire of a transitional leader to look beyond themselves and their immediate circumstances in order to see God's desire to work in the world around them. A potential pitfall of building a church is missing the broader vision of the kingdom. A kingdom-focused leader looks beyond their own temporal gain and the immediate gain of their church to the future of God's kingdom work.

1	Ability to envision a new role for themselves that brings fruitfulness
2	Prayerful, servant, humility, and love of God before all else
3	Spiritual maturity- (The ability to face his own mortality) Awareness. (A pastor should see the negative results of other churches where the minister stayed too long. The Biblical example of transitions - Moses/Joshua, Elijah/Elisha, Paul/Timothy

Table 11 continued

4	There are some pastors who have never been kingdom-focused to begin with. There ego needs are so great that they cannot see the greater church. Others, when retirement comes, are so ready to leave ministry that they have lost their focus.
5	Personal piety
6	Having a desire for the next generation to do more to advance the Kingdom of God than the Executive Leader ever did, which again, is rooted in humility--as seen in Jesus (Phil 2:1-11). A love for God in every dimension of life (Mk 12:30) is essential.
7	Humility, commitment to leadership development, willingness and even desire for others to exceed you,
8	Mindset on the big picture; depersonalizing the situation - "It's not about me."; pointing people to Jesus; humility;
9	It appears you've answered your own question. Such leaders must be able to put the interests of the kingdom above their own selfish agenda.
10	(a) Ability to frame a succession process in Biblical terms.
11	Seeing the need for a strong church with a vision to do gods will over ones own will or ego.
12	The ability to realize that they are only an interim pastor
13	It is crucial to address/confront one's own tendency to build one's own kingdom versus building the Kingdom of God. It also comes through a biblical understanding of the church as kingdom agent/instrument rather than existing for itself.
14	Rejoicing in what the Lord has done more than what the leader does for the Lord

Question 4 What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?
The term team is best understood through the action of working well with others in order to achieve a common goal which is seen when a transitional leader shares power and leverages teamwork.

1	Lack of ego or rather beating down their natural ego bent.
2	Recognition that others are called and gifted in unique ways. Humility to know that those gifts are as important as that of the senior leader
3	Common convictions with successor. Regular, honest communication, mutual respect, sense of humor
4	Those who invest time in their leaders are most successful at building teamwork.
5	A generational view of ministry, service oriented
6	WANTING the Executive Leader to bring even greater glory to God by expanding the already existing ministry, which HUMILITY will enable. After building His team, Jesus entrusted responsibility and authority to them. We must do the same.
7	Humility; recognition of personal limitations; genuine interest in collaboration
8	Unselfishness; a willingness to deem other's needs and interests above their own. Capable of training others.
9	In the context of a succession process, it is critical that a pastor be able to work with a transition team, to step back as they step up.
10	If a sr pastor has matured his or her leadership team adequately, then transitions can be smooth. Sharing power and allowing members to be independent is critical.
11	Humility
12	A biblical understanding of the self and gifting combined with a clear "lived" awareness of one's own weaknesses and shortcomings alongside the Spirit-gifting of others.
13	Humility and conviction for priesthood of all believers

Table 11 continued

	Question 5. What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?
	The term followership is best depicted by John the Baptist and Jesus. John the Baptist, in a pastoral leadership context, declares that he should decrease and Christ should increase (Jn. 3:30). Jesus, while often viewed as the ideal leader, can also be seen as a follower in that His primary mission on earth was to fulfill the will of His Father (Jn. 6:34, 10:30). Applied to the pastoral transition, a leader who practices followership is a leader who is willing to decrease aspects of his leadership so that others around him may increase their leadership.
1	Ability to mentor not be "the teacher." ....but I think by your definitions you are prejudicing your research here. Your supervisor will either catch this or let it go. But your bias in the way you ask the questions are going to bias your responses.
2	Submissive spirit to Christ, a love for the church- desiring the ultimate welfare of his flock, an eternal perspective
3	By developing reproducible ministry a Pastor can give his abilities away to leaders, and not have the need to be in control.
4	Again. Personal piety. The key is not found in the surface level issues of leadership or management. It is found in the depths of the heart.
5	This is directly in proportion to how well the EL is following Jesus. We can only lead well if we first follow well (i.e., Jesus). Jesus said to His disciples that they would do greater works than He did. We should speak the same to our successors
6	Same answer as stated earlier- humility, collaboration, optimism, clarity of communication; integrity
7	Pastors must learn to celebrate the successes of others on the team. Their success, in the long run, increase his value and standing in the congregation.
8	See Number 4. Ability to step back and the Transition Team steps up. It is also critical that the transitional pastor help members recognize the multiple ways that members can contribute to the succession process.
9	Willingness to sacrifice his will or ego for the good of the congregation and leadership team
10	There is much that promotes self-importance, self-reliance, and self-seeking in the wider church. Inner work, including recognizing and addressing these aberrations of biblical leadership, has to take place. This requires study, reflection, others.
11	Servant leadership or a desire to see others flourish
	Question 6. What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?
	The term disciple-making is being viewed primarily in the biblical sense of Matt. 28:19-20 and 2 Tim. 2:2, where there is an intentional spiritual investment in order that the individual invested in may replicate and invest in another spiritually. In a broader secondary context, disciple-making would also apply to a transitioning pastor investing in an individual for leadership development through the depositing of their experience and wisdom into an individual for an area of ministry service.
1	Totally about spending quality time with the person being discipled. Taking them along
2	Intentionality Prayerful Mission-centric Clear-thinking
3	Unselfish spirit (willingness to sacrifice time) Servant's heart (The ability to teach/lead without a condescending spirit.)
4	Again, investing time with others, giving oneself away, that others might grow and flourish.
5	An understanding of the strategic role discipleship plays in the kingdom. It is the means chosen by Christ to extend his rule
6	Urgency in that we are in the final season of life; passion for the lost; devotion to the mission of making disciples who make disciples; wanting to purposefully invest in the next generation to advance the kingdom of God in ways we did not.
7	Conviction about maturation and reproduction; relational; intentionality;
8	Only a few pastors have the training and experiencing in truly discipling believers and mentoring future leaders. The ability to identify and help develop spiritual gifts in others is an area that has often escaped formal training.

Table 11 continued

9	In the context of a succession process, a transitional pastor will have a limited ability to make disciples and will need an external resource to develop disciples for the succession process.
10	Willingness to pass on what he knows to others
11	It is crucial that a church have as part of its ethos an appreciation for the value and priority of turning around to those who come along behind us and encouraging their spiritual growth and development. This requires consistent preaching/teaching.
12	Vision for biblical community and discipleship, conviction, faith in how the Lord has designed the kingdom to expand

Question 7. What additional input in regards to relevant areas, ideas, or broad categories describing personal character traits or qualities of a successful transitional pastor can you offer?	
1	Personally, from my experience, you are putting more emphasis on the person and not on the system. And the two have to work together. So the support system around the leader(s) are just as important.
2	Humility is key. Without it, the transition will ultimately be sabotaged
3	Genuine transparency, a healthy sense of humor, advance planning and open communication with the successor and the lay leaders are essential.
4	Servant leadership, and wanting to see others succeed make all the difference in the world.
5	In Greek, the word HUMILITY means to go to a lower place. Jesus did just that. He willingly "made Himself nothing" meaning that He let go of His status and became a servant. When transitioning, we must do the same: let go of status and serve the incoming leaders. Humility is not thinking less of ourselves. It is thinking less often of ourselves.
6	Nothing I have not expressed already
7	The ability to function as a problem solver, one who can reconcile differing parties; therefore a good listener. One who does not make snap judgments and one who always seeks to hear both sides of a story.
8	A successful transitional pastor needs to be teachable.
9	The posture of the heart is crucial and preeminent. The hard inner work that produces humility will foster both the grace and the intentionality necessary to ready a church for a new leader.
10	Ministry idolatry crushes the ability to transition, to hand responsibilities to others. If a leader finds his worth in his task or title, and not in the Lord, the leader will struggle to hand tasks and title to someone else.

Round 2

Having collected and analyzed round 1 responses, a Likert-type survey was developed, analyzed, and edited. Round 2 questions were centered on the research questions and organized around five aspects of successful transitioning leaders, general characteristics, kingdom-focused characteristics, team oriented characteristics, followership characteristics, and disciple-making characteristics. The resultant six question survey, containing 116 characteristics, was sent to the remaining 14 participants. The survey asked each expert to rate every characteristic on its level of importance as it relates to successful transitioning pastors. The Likert rankings were 1 – not at all important, 2 – somewhat

important, 3 – important, and 4 – very important. Tables 12-16 display the raw

percentage data from this survey. There were 13 participants in this round.

Table 12. Round 2 expert panel responses to question 1

#	General Characteristic	Level of Importance				MEAN	STD
Expert response to Likert scale question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?							
		4	3	2	1		
1	Concern (care for the good of the church)	92.3	7.7	0	0	3.92	0.277
2	Willingness to let go of authority - the ability to let go, respect boundaries both during and after transition, understand that they are an "interim," and release ministry to another	84.6	15.4	0	0	3.92	0.277
3	Emotional maturity	84.6	15.4	0	0	3.85	0.376
4	A love that is greater for flock than self.	76.9	23.1	0	0	3.77	0.439
5	Humility	76.9	15.4	7.7	0	3.69	0.630
6	Honesty	69.2	23.1	7.7	0	3.62	0.650
7	Trust in God's providence	61.5	38.5	0	0	3.62	0.506
8	Trustworthiness	61.5	38.5	0	0	3.62	0.506
9	Spirit-led	61.5	30.8	7.7	0	3.54	0.660
10	Leading by example	61.5	30.8	7.7	0	3.54	0.660
11	Self-awareness – knowing strengths and weaknesses	61.5	30.8	7.7	0	3.54	0.660
12	Generosity—willing to share friendships, relationships, credit, time, and self to ensure the success of the next pastor	46.2	46.2	7.7	0	3.38	0.650
13	Courage	53.9	30.8	15.4	0	3.38	0.768
14	Commitment to leadership development	38.5	61.5	0	0	3.38	0.506
15	A dream for their own next chapter	53.9	30.8	15.4	0	3.38	0.768
16	Vision for the future - willingness to lead and assemble resources for succession while preparing the congregation to flourish under the new leadership. A desire for the ministry to thrive	53.9	30.8	15.4	0	3.38	0.768
17	Secure in themselves	46.2	46.2	7.7	0	3.38	0.650
18	Servanthood	46.2	38.5	15.4	0	3.31	0.751
19	Sense of responsibility - ownership for the good and the bad	38.5	46.2	15.4	0	3.23	0.725
20	Holiness	46.2	30.8	23.0	0	3.23	0.832
21	Patience to wait on the development of the successor	23.1	69.2	7.7	0	3.23	0.599
22	Clarity	30.8	61.5	7.7	0	3.23	0.599
23	Being on the same page with your spouse in regard to transition	38.5	46.2	7.7	7.7	3.15	0.899
24	Transparency	23.1	69.2	7.7	0	3.15	0.555
25	Optimism	23.1	61.5	15.4	0	3.08	0.641

Table 12 continued

26	Flexibility	30.8	46.2	23.1	0	3.08	0.760
27	Compassion	23.1	46.2	23.1	7.7	2.85	0.899
28	Capacity for coaching others	15.4	53.9	23.1	7.7	2.77	0.832
29	Problem solver – able to reconcile and listen	15.4	53.9	23.1	7.7	2.77	0.832
30	Teachability	30.8	30.8	23.1	15.4	2.77	1.092
31	Willingness to announce a definite retirement date one year in advance	30.8	23.1	38.5	7.7	2.77	1.013
32	Sense of humor	7.7	53.9	30.8	7.7	2.62	0.768
33	Objectivity	23.1	30.8	30.8	15.4	2.62	1.044
34	Perceptive about qualities needed in their successor	15.4	38.5	38.5	7.7	2.62	0.870
35	The capacity and desire to develop as a leader	23.1	30.8	30.8	15.4	2.62	1.044
36	Systematic – strategically able to plan	7.7	46.2	38.5	7.7	2.54	0.776
37	Vulnerability	7.7	46.2	30.8	15.4	2.46	0.877
38	Analytical	7.7	30.8	46.2	15.4	2.31	0.855

Table 13. Round 2 expert panel responses to question 3

Expert response to Likert scale question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?							
#	Kingdom-focused Characteristics	Level of Importance				MEAN	STD
		4	3	2	1		
1	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	92.3	7.7	0	0	3.92	0.277
2	Love of God before all else – in every area of life	76.9	15.4	7.7	0	3.69	0.630
3	Spiritual Maturity	69.2	30.8	0	0	3.69	0.480
4	Confront tendencies to build own kingdom	61.5	38.5	0	0	3.62	0.506
5	Humility	84.6	7.7	7.7	0	3.54	1.127
6	Desire for others to exceed you. A desire for the next generation to do more than the current generation	53.9	38.5	7.7	0	3.46	0.660
7	Prayerful	53.9	38.5	7.7	0	3.46	0.660
8	Point people to Jesus	46.2	53.9	0	0	3.46	0.519
9	Servant	53.9	30.8	15.4	0	3.38	0.768
10	Depersonalizing the situation - "it's not about me"	53.9	38.5	0	7.7	3.38	0.870
11	Personal piety	53.9	23.1	23.1	0	3.31	0.855
12	Understanding of the church as kingdom agent/instrument rather than existing for itself	38.5	53.9	7.7	0	3.31	0.630
13	Awareness - learning from others failure	23.1	61.5	15.4	0	3.15	0.555
14	Leadership development	23.1	69.2	7.7	0	3.15	0.555
15	Vision for a new role for themselves that results in fruit	38.5	30.8	30.8	0	3.08	0.862
16	Retained passion for ministry versus burn-out	30.8	46.2	23.1	0	3.08	0.760
17	Realization of mortality	15.4	69.2	15.4	0	3.00	0.577
18	Ability to frame a succession process in Biblical terms - seeing the Biblical example of transitions: Moses/Joshua, Elijah/Elisha, Paul/Timothy	23.1	46.2	15.4	15.4	2.77	1.013
19	View themselves as interim pastor	23.1	30.8	30.8	15.4	2.62	1.044

Table 14. Round 2 expert panel responses to question 4

#	Team Oriented Characteristics	Level of Importance				MEAN	STD
	Expert response to Likert scale question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?						
		4	3	2	1		
1	Willingness to fight natural ego	76.9	23.1	0	0	3.77	0.439
2	Humility	76.9	15.4	7.7	0	3.69	0.630
3	Mutual respect	61.5	38.5	0	0	3.62	0.506
4	A willingness to invest time in their leaders	69.5	23.1	7.7	0	3.62	0.650
5	Regular, honest communication	61.5	38.5	0	0	3.62	0.506
6	Unselfishness - to put other's needs and interests above their own	69.2	23.1	7.7	0	3.62	0.650
7	Recognize that others gifts are as important as that of the senior leader	53.9	46.2	0	0	3.54	0.519
8	Entrust responsibility and authority to your team	69.2	15.4	15.4	0	3.54	0.776
9	Adequately developing a matured leadership team	61.5	23.1	15.4	0	3.46	0.776
10	A biblical understanding strengths and weaknesses in light of the spiritual gifts	46.2	38.5	15.4	0	3.31	0.751
11	Sharing power	46.2	38.5	15.4	0	3.31	0.751
12	Genuine interest in collaboration	46.2	38.5	15.4	0	3.31	0.751
13	Empowering a transition team while stepping back as they step up	46.2	38.5	15.4	0	3.31	0.751
14	A desire to bring greater glory to God through the expansion of the existing ministry	46.2	30.8	23.1	0	3.23	0.832
15	Conviction of the priesthood of all believers	53.9	15.4	30.8	0	3.23	0.927
16	Common Convictions	30.8	53.9	15.4	0	3.15	0.689
17	Service oriented	30.8	38.5	30.8	0	3.00	0.816
18	Allowing team members to be independent	30.8	38.5	23.1	7.7	2.92	0.954
19	Able to train others	15.4	61.5	15.4	7.7	2.85	0.801
20	Sense of humor	23.1	38.5	30.8	7.7	2.77	0.927
21	A generational view of ministry	15.4	38.5	30.8	15.4	2.54	0.967

Table 15. Round 2 expert panel responses to question 5

#	Followership Characteristics	Level of Importance				MEAN	STD
	Expert response to Likert scale question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?						
		4	3	2	1		
1	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	84.6	15.4	0	0	3.85	0.768
2	Clarity of communication	84.6	15.4	0	0	3.85	0.768
3	Celebrate the success of those around you	76.9	23.1	0	0	3.77	0.768
4	Integrity	76.9	15.4	7.7	0	3.69	0.768
5	Self sacrifice for congregation and leadership team	61.5	38.5	0	0	3.62	0.768
6	Fidelity in first following Jesus	69.2	23.1	7.7	0	3.62	0.768
7	Servant leadership - others centered	61.5	38.5	0	0	3.62	0.768
8	A sense that mission comes before self	69.2	23.1	7.7	0	3.62	0.768
9	Humility	76.9	7.7	15.4	0	3.62	0.768
10	Optimism	53.9	38.5	7.7	0	3.46	0.768
11	Decrease so that transition team can increase	46.2	53.9	0	0	3.46	0.768
12	Collaboration	46.2	38.5	15.4	0	3.31	0.768
13	Personal Piety - not surface level issues of leadership or management; key is found in the heart	38.5	53.9	7.7	0	3.31	0.768
14	Developing a reproducible ministry - giving abilities away as well as giving away control	46.2	38.5	15.4	0	3.31	0.768
15	Submissive spirit	46.2	30.8	23.1	0	3.23	0.768
16	Empower members to contribute to the succession process	23.1	76.9	0	0	3.23	0.768
17	Character development through study, reflection, and others	30.8	53.9	15.4	0	3.15	0.768
18	Ability to mentor and not be "the teacher"	30.1	53.9	15.4	0	3.15	0.768

Table 16. Round 2 expert panel responses to question 6

#	Disciple-making Characteristics	Level of Importance				MEAN	STD
		4	3	2	1		
	Expert response to Likert scale question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?						
1	Consistent preaching and teaching	69.2	23.1	7.7	0	3.62	0.650
2	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	53.9	46.2	0	0	3.54	0.519
3	Servant's heart - the ability to teach/lead without a condescending spirit	53.9	46.2	0	0	3.54	0.519
4	Intentional	61.5	30.8	7.7	0	3.54	0.660
5	Willingness to pass on what is known to others	53.6	46.2	0	0	3.54	0.519
6	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	61.2	23.1	7.7	0	3.46	0.776
7	Prayerful	53.9	30.8	15.4	0	3.38	0.768
8	Vision for biblical community and discipleship	46.2	38.5	15.4	0	3.31	0.751
9	Devotion to disciple making that replicates	46.2	30.8	23.1	0	3.23	0.832
10	Desire to invest in the next generation for kingdom advancement	30.8	61.5	7.7	0	3.23	0.599
11	Mission - centric	23.1	76.9	0	0	3.23	0.439
12	Experience in discipling believers	38.5	38.5	23.1	0	3.15	0.801
13	Experience in mentoring future leaders	30.8	53.9	15.4	0	3.15	0.689
14	Conviction of how the Lord has designed the kingdom to expand through maturation and reproduction - understanding the strategic role discipleship plays in the kingdom	38.5	30.8	30.8	0	3.08	0.862
15	Clear thinking	23.1	61.5	15.4	0	3.08	0.641
16	Relational	30.8	46.2	23.1	0	3.08	0.760
17	Passion for the lost	30.8	46.2	23.1	0	3.08	0.760
18	Urgency	23.1	46.2	15.4	15.4	2.77	1.013
19	The ability to identify and help develop spiritual gifts	15.4	53.9	23.1	7.7	2.77	0.832
20	In the context of a succession process, a transitional pastor will have a limited ability to make disciples and will need an external resource to develop disciples for the succession process	15.4	23.1	53.9	7.7	2.46	0.877

In addition, question 2 of round 1 asked participants to identify their top three successful transitioning traits from the general characteristics of successful transitioning pastors given in round question one. Table 17 displays the experts' responses.

Table 17. Round 2 expert panel responses to question 2

	Expert response to top 3 Succession characteristics, question 2: Please identify what you consider to be the three most important character traits or qualities from the list of 38 character traits and qualities for a successful transitioning		
	Character Trait	Percentage	Count
1	Humility	15.38%	6
2	Willingness to let go of authority	15.38%	6
3	Concern (care for the good of the church)	12.82%	5
4	Vision for the future- Desire for Ministry to thrive	7.69%	3
5	Willingness to announce a definite retirement date one year in advance	7.69%	3
6	Spirit-led	7.69%	3
7	A dream for their own next chapter	5.13%	2
8	Trust in God's providence	5.13%	2
9	A love that is greater for flock than self	2.56%	1
10	Secure	2.56%	1
11	Objectivity	2.56%	1
12	Teachability	2.56%	1
13	Honesty	2.56%	1
14	Commitment to leadership development	2.56%	1
15	Servanthood	2.56%	1
16	Self-awareness- knowing strengths and weaknesses	2.56%	1
17	Being on the same page with your spouse in regard to transition	2.56%	1
18	Flexibility	0.00%	0
19	Capacity and desire to develop as a leader	0.00%	0
20	Emotional maturity	0.00%	0
21	Sense of responsibility- ownership for the good and the bad	0.00%	0
22	Vulnerability	0.00%	0
23	Analytical	0.00%	0
24	Optimism	0.00%	0
25	Clarity	0.00%	0
26	Courage	0.00%	0
27	Leading by example	0.00%	0
28	Trustworthiness	0.00%	0
29	Holiness	0.00%	0
30	Compassion	0.00%	0
31	Capacity for coaching others	0.00%	0
32	Transparency	0.00%	0
33	Perceptive about qualities needed in successor	0.00%	0
34	Patience to wait on the development of the successor	0.00%	0
35	Generosity- willingness to share personal resources to ensure the success of the next pastor	0.00%	0
36	Systematic- strategically able to plan	0.00%	0
37	Problem Solver- able to reconcile and listen	0.00%	0
38	Sense of humor	0.00%	0
	Total	100%	38

The purpose of the Likert survey was to measure consensus on the character and traits of successful transitioning pastors given by the expert panel in round 1.

Consensus was defined as 70 percent of the experts selecting "3" (important) or higher. As with round 1 of this research, all participants were given an opportunity to review and revise their responses in light of the other experts' responses. Tables 18-22 represent characteristics that met consensus after review and revision by the experts. Numbers indicate percentages followed by a "yes" or "no" signifying whether a characteristic met consensus. Because changes in the revision were minimal, these changes are reported in a separate table (see appendix 19). There were 13 participants in this round and the responses are percentages.

Table 18. Round 2 expert panel consensus for question 1

#	General Consensus Characteristics	Extremely Important or Important (%)	Somewhat Important or Not at All Important (%)	Consensus
	Consensus responses to the expert panel, question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?			
1	Willingness to let go of authority	100.0	0.0	Yes
2	Concern- care for the good of the church	100.0	0.0	Yes
3	Emotional maturity	100.0	0.0	Yes
4	Commitment to leadership development	100.0	0.0	Yes
5	Trustworthiness	100.0	0.0	Yes
6	Self-awareness- knowing strengths and weaknesses	100.0	0.0	Yes
7	Trust in God's providence	100.0	0.0	Yes
8	A love that is greater for flock than self	100.0	0.0	Yes
9	Secure	92.3	7.7	Yes
10	Humility	92.3	7.7	Yes
11	Honesty	92.3	7.7	Yes
12	Clarity	92.3	7.7	Yes
13	Leading by example	92.3	7.7	Yes
14	Transparency	92.3	7.7	Yes
15	Patience to wait on the development of the successor	92.3	7.7	Yes
16	Generosity- willingness to share personal resources to ensure the success of the next pastor	92.3	7.7	Yes
17	Spirit-led	92.3	7.7	Yes
18	Vision for the future- Desire for Ministry to thrive	84.6	15.4	Yes
19	Sense of responsibility- ownership for the good and the bad	84.6	15.4	Yes
20	A dream for their own next chapter	84.6	15.4	Yes
21	Servanthood	84.6	15.4	Yes
22	Being on the same page with your spouse in regard to transition	84.6	15.4	Yes
23	Courage	84.6	15.4	Yes
24	Optimism	84.6	15.4	Yes
25	Flexibility	77.0	23.0	Yes
26	Holiness	77.0	23.0	Yes
27	Compassion	69.2	30.8	No
28	Capacity for coaching others	69.2	30.8	No
29	Problem Solver- able to reconcile and listen	69.2	30.8	No
30	Sense of humor	61.5	38.5	No
31	Teachability	61.5	38.5	No
32	Objectivity	53.8	46.2	No
33	Vulnerability	53.8	46.2	No
34	Willingness to announce a definite retirement date one year in advance	53.8	46.2	No
35	Perceptive about qualities needed in successor	53.8	46.2	No
36	Systematic- strategically able to plan	53.8	46.2	No
37	Capacity and desire to develop as a leader	53.8	46.2	No
38	Analytical	38.4	61.6	No

Table 19. Round 2 expert panel consensus for question 3

Consensus responses of the expert panel, question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?				
#	Kingdom-focused Consensus Characteristics	Extremely Important or Important (%)	Somewhat Important or Not at All Important (%)	Consensus
1	Spiritual Maturity	100.0	0.0	Yes
2	Point people to Jesus	100.0	0.0	Yes
3	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	100.0	0.0	Yes
4	Confront tendencies to build own kingdom	100.0	0.0	Yes
5	Prayerful	92.3	7.7	Yes
6	Humility	92.3	7.7	Yes
7	Love of God before all else – in every area of life	92.3	7.7	Yes
8	Understanding of the church as kingdom agent/instrument rather than existing for itself	92.3	7.7	Yes
9	Depersonalizing the situation - "it's not about me"	92.3	7.7	Yes
10	Leadership development	92.3	7.7	Yes
11	Desire for others to exceed you. A desire for the next generation to do more than the current generation	92.4	7.7	Yes
12	Awareness - learning from others failure	84.6	15.4	Yes
13	Realization of mortality	84.6	15.4	Yes
14	Servant	84.6	15.4	Yes
15	Personal piety	77.0	23.0	Yes
16	Retained passion for ministry versus burn-out	77.0	23.0	Yes
17	Ability to frame a succession process in Biblical terms - seeing the Biblical example of transitions: Moses/Joshua, Elijah/Elisha, Paul/Timothy	69.2	30.8	No
18	Vision for a new role for themselves that results in fruit	69.2	30.8	No
19	View themselves as interim pastor	53.8	46.2	No

Table 20. Round 2 expert panel consensus for question 4

#	Team Oriented Consensus Characteristics	Extremely Important or Important (%)	Somewhat Important or Not at All Important (%)	Consensus
	Consensus responses of expert panel, question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?			
1	Recognize that others gifts are as important as that of the senior leader	100.0	0.0	Yes
2	Willingness to fight natural ego	100.0	0.0	Yes
3	Regular, honest communication	100.0	0.0	Yes
4	Mutual respect	100.0	0.0	Yes
5	Humility	92.3	7.7	Yes
6	Unselfishness - to put other's needs and interests above their own	92.3	7.7	Yes
7	A willingness to invest time in their leaders	92.3	7.7	Yes
8	A biblical understanding strengths and weaknesses in light of the spiritual gifts	84.6	15.4	Yes
9	Sharing power	84.6	15.4	Yes
10	Adequately developing a matured leadership team	84.6	15.4	Yes
11	Empowering a transition team while stepping back as they step up	84.6	15.4	Yes
12	Genuine interest in collaboration	84.6	15.4	Yes
13	Entrust responsibility and authority to your team	84.6	15.4	Yes
14	A desire to bring greater glory to God through the expansion of the existing ministry	84.6	15.4	Yes
15	Common Convictions	84.6	15.4	Yes
16	Able to train others	76.9	23.1	Yes
17	Allowing team members to be independent	69.2	30.8	No
18	Service oriented	69.2	30.8	No
19	Conviction of the priesthood of all believers	69.2	30.8	No
20	Sense of humor	61.5	38.5	No
21	A generational view of ministry	53.8	46.2	No

Table 21. Round 2 expert panel responses for question 5

Consensus responses of the expert panel, question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?			
#	Followership Consensus Characteristics	Extremely Important or Important (%)	Somewhat Important or Not at All Important (%)	Consensus
1	Servant leadership - others centered	100.0	0.0	Yes
2	Self sacrifice for congregation and leadership team	100.0	0.0	Yes
3	Decrease so that transition team can increase	100.0	0.0	Yes
4	Empower members to contribute to the succession process	100.0	0.0	Yes
5	Celebrate the success of those around you	100.0	0.0	Yes
6	Clarity of communication	100.0	0.0	Yes
7	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	100.0	0.0	Yes
8	A sense that mission comes before self	92.3	7.7	Yes
9	Integrity	92.3	7.7	Yes
10	Fidelity in first following Jesus	92.3	7.7	Yes
11	Personal Piety - not surface level issues of leadership or management; key is found in the heart	92.3	7.7	Yes
12	Optimism	92.3	7.7	Yes
13	Character development through study, reflection, and others	84.6	15.4	Yes
14	Humility	84.6	15.4	Yes
15	Collaboration	84.6	15.4	Yes
16	Ability to mentor and not be "the teacher"	84.6	15.4	Yes
17	Developing a reproducible ministry - giving abilities away as well as giving away control	84.6	15.4	Yes
18	Submissive spirit	77.0	23.0	Yes

Table 22. Round 2 expert panel consensus for question 6

#	Disciple-making Consensus Characteristics	Extremely Important or Important (%)	Somewhat Important or Not at All Important (%)	Consensus
Consensus responses of the expert panel, question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?
1	Willingness to pass on what is known to others	100.0	0.0	Yes
2	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	100.0	0.0	Yes
3	Servant's heart - the ability to teach/lead without a condescending spirit	100.0	0.0	Yes
4	Mission - centric	100.0	0.0	Yes
5	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	92.3	7.7	Yes
6	Consistent preaching and teaching	92.3	7.7	Yes
7	Intentional	92.3	7.7	Yes
8	Desire to invest in the next generation for kingdom advancement	92.3	7.7	Yes
9	Vision for biblical community and discipleship	84.6	15.4	Yes
10	Experience in mentoring future leaders	84.6	15.4	Yes
11	Prayerful	84.6	15.4	Yes
12	Clear thinking	84.6	15.4	Yes
13	Experience in discipling believers	77.0	23.0	Yes
14	Passion for the lost	77.0	23.0	Yes
15	Devotion to disciple making that replicates	77.0	23.0	Yes
16	Relational	77.0	23.0	Yes
17	Conviction of how the Lord has designed the kingdom to expand through maturation and reproduction - understanding the strategic role discipleship plays in the kingdom	69.2	30.8	No
18	The ability to identify and help develop spiritual gifts	69.2	30.8	No
19	Urgency	69.2	30.8	No
20	In the context of a succession process, a transitional pastor will have a limited ability to make disciples and will need an external resource to develop disciples for the succession process	38.5	61.5	No

Experts whose answers fell outside of consensus on character traits that achieved consensus were asked to either justify remaining outside of consensus or choose to align with consensus. Table 23 identifies questions in which experts changed their answers to join consensus. In each case, one participant chose to join consensus. The number of participants is 13 for the entirety of the table and responses reported in the following table are percentages.

Table 23. Traits impacted by round 2 review and revision

Revisions by the Expert Panel—Round 2					
Character Category	Question	Extremely Important or Very Important (%)	Somewhat Important or Not at All Important (%)	Extremely Important or Very Important (%)	Somewhat Important or Not at All Important (%)
		Before Revisions	Before Revisions	After Revisions	After Revisions
1. Character traits and qualities of a successful transitioning pastor	(29) Self-awareness – knowing strengths and weaknesses.	92.3	7.7	100.00	0.0
4. Character traits or qualities allowing a successful transitioning pastor to be team oriented, e.g. empowering others through shared leadership.	(12) A desire to bring greater glory to God through the expansion of the existing ministry.	77.0	23.0	84.6	15.4

As shown in Table 23, some experts chose to join consensus while the majority of experts were satisfied with their initial answers. In a few cases, experts chose to justify remaining outside of consensus. These responses can be found in Appendix 19. Once characteristics that did not achieve consensus were removed, 92 characteristics had achieved consensus. These 92 characteristics served as the characteristics used in round 3 survey.

Round 3

Having collected and analyzed round 2 responses, 92 characteristics had reached consensus among the 13 remaining experts. Round 3 of this research was a second iteration of round 2 survey without the characteristics that did not achieve consensus. Diverging from round 2, which utilized a Likert scale, round 3 utilized a dichotomous survey of agree or disagree. In consistency with rounds 1 and 2, the 92 consensus characteristics in round 3 remained in five categories: general, kingdom-focused, team oriented, followership, and disciple-making. Consensus for the round 3 survey was defined as 70% of respondents choosing "agree." As with round 2, round 3 anonymity was guarded and all of the experts were given the opportunity to review and

revise their own responses in light of the other experts' responses. As expected, all 92

characteristics achieved the standard of consensus. Tables 24-28 display the raw

percentage data from this survey and there were 12 participants in this round.

Table 24. Round 3 expert panel responses to question 1

#	General Characteristic	Agree (%)	Disagree (%)	MEAN	STD
Expert panel responses, question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?				
1	Clarity	100.0	0.0	2.00	0.000
2	Trustworthiness	100.0	0.0	2.00	0.000
3	Spirit-led	100.0	0.0	2.00	0.000
4	Courage	100.0	0.0	2.00	0.000
5	Vision for the future- Desire for Ministry to thrive	100.0	0.0	2.00	0.000
6	Transparency	100.0	0.0	2.00	0.000
7	Secure	100.0	0.0	2.00	0.000
8	Concern- care for the good of the church	100.0	0.0	2.00	0.000
9	Emotional maturity	100.0	0.0	2.00	0.000
10	Willingness to let go of authority	100.0	0.0	2.00	0.000
11	Generosity- willingness to share personal resources to ensure the success of the next pastor	100.0	0.0	2.00	0.000
12	Being on the same page with your spouse in regard to transition	100.0	0.0	2.00	0.000
13	Optimism	91.7	8.3	1.92	0.289
14	Honesty	91.7	8.3	1.92	0.289
15	Commitment to leadership development	91.7	8.3	1.92	0.289
16	Servanthood	91.7	8.3	1.92	0.289
17	Leading by example	91.7	8.3	1.92	0.289
18	Self-awareness- knowing strengths and weaknesses	91.7	8.3	1.92	0.289
19	Trust in God's providence	91.7	8.3	1.92	0.289
20	A love that is greater for flock than self	91.7	8.3	1.92	0.289
21	Patience to wait on the development of the successor	91.7	8.3	1.92	0.289
22	Sense of responsibility- ownership for the good and the bad	83.3	16.7	1.83	0.389
23	Flexibility	83.3	16.7	1.83	0.389
24	Humility	83.3	16.7	1.83	0.389
25	Holiness	83.3	16.7	1.83	0.389
26	A dream for their own next chapter	75.0	25.0	1.75	0.452

Table 25. Round 3 expert panel responses to question 3

#	Kingdom-focused Characteristics	Agree	Disagree	MEAN	STD
Expert panel responses, question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?
1	Prayerful	100.0	0.0	2.00	0.000
2	Servant	100.0	0.0	2.00	0.000
3	Humility	100.0	0.0	2.00	0.000
4	Spiritual Maturity	100.0	0.0	2.00	0.000
5	Awareness - learning from others failure	100.0	0.0	2.00	0.000
6	Leadership development	100.0	0.0	2.00	0.000
7	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	100.0	0.0	2.00	0.000
8	Love of God before all else – in every area of life	91.7	8.3	1.92	0.289
9	Confront tendencies to build own kingdom	91.7	8.3	1.92	0.289
10	Depersonalizing the situation - "it's not about me"	91.7	8.3	1.92	0.289
11	Point people to Jesus	91.7	8.3	1.92	0.289
12	Desire for others to exceed you. A desire for the next generation to do more than the current generation	91.7	8.3	1.92	0.289
13	Personal piety	91.7	8.3	1.92	0.289
14	Retained passion for ministry versus burn-out	91.7	8.3	1.92	0.289
15	Realization of mortality	91.7	8.3	1.92	0.289
16	Understanding of the church as kingdom agent/instrument rather than existing for itself	83.3	16.7	1.83	0.389

Table 26. Round 3 expert panel responses to question 4

#	Team Oriented Characteristics	Agree	Disagree	MEAN	STD
Expert panel responses, question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?
1	Mutual respect	100.0	0.0	2.00	0.000
2	Recognize that others gifts are as important as that of the senior leader	100.0	0.0	2.00	0.000
3	Entrust responsibility and authority to your team	100.0	0.0	2.00	0.000
4	Empowering a transition team while stepping back as they step up	100.0	0.0	2.00	0.000
5	Humility	91.7	8.3	1.92	0.289
6	Sharing power	91.7	8.3	1.92	0.289
7	Adequately developing a matured leadership team	91.7	8.3	1.92	0.289
8	Genuine interest in collaboration	91.7	8.3	1.92	0.289
9	Unselfishness - to put other's needs and interests above their own	91.7	8.3	1.92	0.289
10	Regular, honest communication	91.7	8.3	1.92	0.289
11	A willingness to invest time in their leaders	91.7	8.3	1.92	0.289
12	Able to train others	83.3	16.7	1.83	0.389
13	A desire to bring greater glory to God through the expansion of the existing ministry	83.3	16.7	1.83	0.389
14	Common Convictions	83.3	16.7	1.83	0.389
15	Willingness to fight natural ego	83.3	16.7	1.83	0.389
16	A biblical understanding strengths and weaknesses in light of the spiritual gifts	75.0	25.0	1.75	0.452

Table 27. Round 3 expert panel responses to question 5

#	Followership Characteristics	Agree	Disagree	MEAN	STD
	Expert panel responses, question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?				
1	Servant leadership - others centered	100.0	0.0	2.00	0.000
2	Decrease so that transition team can increase	100.0	0.0	2.00	0.000
3	Empower members to contribute to the succession process	100.0	0.0	2.00	0.000
4	Clarity of communication	100.0	0.0	2.00	0.000
5	Integrity	100.0	0.0	2.00	0.000
6	Self sacrifice for congregation and leadership team	91.7	8.3	1.92	0.289
7	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	91.7	8.3	1.92	0.289
8	Celebrate the success of those around you	91.7	8.3	1.92	0.289
9	Humility	91.7	8.3	1.92	0.289
10	Collaboration	91.7	8.3	1.92	0.289
11	Optimism	91.7	8.3	1.92	0.289
12	Fidelity in first following Jesus	91.7	8.3	1.92	0.289
13	Personal Piety - not surface level issues of leadership or management; key is found in the heart	91.7	8.3	1.92	0.289
14	Developing a reproducible ministry - giving abilities away as well as giving away control	91.7	8.3	1.92	0.289
15	Submissive spirit	83.3	16.7	1.83	0.389
16	Character development through study, reflection, and others	83.3	16.7	1.83	0.389
17	A sense that mission comes before self	83.3	16.7	1.83	0.389
18	Ability to mentor and not be "the teacher"	75.0	25.0	1.75	0.452

Table 28. Round 3 expert panel responses to question 6

#	Disciple-making characteristics	Agree	Disagree	MEAN	STD
	Expert panel responses, question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?				
1	Willingness to pass on what is known to others	100.0	0.0	2.00	0.000
2	Prayerful	100.0	0.0	2.00	0.000
3	Desire to invest in the next generation for kingdom advancement	100.0	0.0	2.00	0.000
4	Mission-centric	100.0	0.0	2.00	0.000
5	Clear thinking	100.0	0.0	2.00	0.000
6	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	91.7	8.3	1.92	0.289
7	Consistent preaching and teaching	91.7	8.3	1.92	0.289
8	Experience in discipling believers	91.7	8.3	1.92	0.289
9	Relational	91.7	8.3	1.92	0.289
10	Intentional	91.7	8.3	1.92	0.289
11	Devotion to disciple-making that replicates	91.7	8.3	1.92	0.289
12	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	91.7	8.3	1.92	0.289
13	Servant's heart - the ability to teach/lead without a condescending spirit	91.7	8.3	1.92	0.289
14	Vision for biblical community and discipleship	91.7	8.3	1.92	0.289
15	Experience in mentoring future leaders	83.3	16.7	1.83	0.389
16	Passion for the lost	83.3	16.7	1.83	0.389

In addition, question 2 asked experts to rank the six successful transitioning traits identified in round 2. The ranking from greatest to least was (1) Humility, (2) Concern – care for the good of the church, (3) Willingness to let go of authority, (4) Vision for the future-desire for ministry to thrive, (5) Spirit-led, and (6) Willingness to announce a definite retirement date one year in advance. Table 29 displays the top six characteristics identified by the experts in the first round of survey. These six characteristics were selected from the thirty-eight general characteristics given by the experts for successful transitioning pastors. The table also reflects each expert's responses and the mean. There were 12 participants in this round.

Table 29. Top 6 succession traits, responses to question 2

Expert panel responses, question 2: Please rank from 1 to 6 what you consider to be the most important character traits or qualities for a successful transitioning pastor (1 = most important, 2 = 2nd most important, 3 = 3rd most important...).														
#	Top 6 Traits	Expert 1	Expert 2	Expert 3	Expert 4	Expert 5	Expert 6	Expert 7	Expert 8	Expert 9	Expert 10	Expert 11	Expert 12	Mean
1	Humility	3	2	6	5	1	2	5	5	2	6	6	5	4.00
2	Concern (care for the good of the church)	4	4	2	4	4	5	3	4	5	5	3	4	3.92
3	Willingness to let go of authority	2	6	4	2	5	3	4	6	4	4	4	3	3.92
4	Vision for the future- desire for ministry to thrive	5	5	5	3	6	4	2	2	1	3	2	6	3.67
5	Spirit-led	6	3	3	6	2	1	1	3	3	2	5	2	3.08
6	Willingness to announce a definite retirement date one year in advance	1	1	1	1	3	6	6	1	6	1	1	1	2.42

Experts whose answers fell outside of consensus in round 3 were asked to either justify remaining outside of consensus or choose to align with consensus. Several participants responded that they were satisfied with their answers and none of the participants who were outside of consensus chose to align with consensus. One participant provided justification. These responses can be found in appendix 21. The

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responses justifying remaining outside of consensus for round 2 (see appendix 20) were considered relevant and sufficient for the same item in round 3 where the same respondent remained outside of consensus for a second time. Once characteristics that did not achieve consensus were removed, 92 characteristics had achieved consensus.

Table 30. Characteristics of consensus round 2 and 3 comparison, general characteristics

| # | General Characteristic | Round 2 | | Round 3 | | Consensus Difference |
		Extremely Important or Very Important	Somewhat Important or Not at All Important	Agree	Disagree	
1	Spirit-led	92.3	7.7	100.0	0.0	Increase
2	Secure	92.3	7.7	100.0	0.0	Increase
3	Clarity	92.3	7.7	100.0	0.0	Increase
4	Transparency	92.3	7.7	100.0	0.0	Increase
5	Generosity- willingness to share personal resources to ensure the success of the next pastor	92.3	7.7	100.0	0.0	Increase
6	Being on the same page with your spouse in regard to transition	84.6	15.4	100.0	0.0	Increase
7	Vision for the future- Desire for Ministry to thrive	84.6	15.4	100.0	0.0	Increase
8	Courage	84.6	15.4	100.0	0.0	Increase
9	Servanthood	84.6	15.4	91.7	8.3	Increase
10	Optimism	84.6	15.4	91.7	8.3	Increase
11	Flexibility	77.0	23.0	83.3	16.7	Increase
12	Holiness	77.0	23.0	83.3	16.7	Increase
13	Concern- care for the good of the church	100.0	0.0	100.0	0.0	Same
14	Emotional maturity	100.0	0.0	100.0	0.0	Same
15	Willingness to let go of authority	100.0	0.0	100.0	0.0	Same
16	Trustworthiness	100.0	0.0	100.0	0.0	Same
17	Honesty	92.3	7.7	91.7	8.3	Same
18	Leading by example	92.3	7.7	91.7	8.3	Same
19	Patience to wait on the development of the successor	92.3	7.7	91.7	8.3	Same
20	Sense of responsibility- ownership for the good and the bad	84.6	15.4	83.3	16.7	Same
21	Self-awareness- knowing strengths and weaknesses	100.0	0.0	91.7	8.3	Decrease
22	Trust in God's providence	100.0	0.0	91.7	8.3	Decrease
23	A love that is greater for flock than self	100.0	0.0	91.7	8.3	Decrease
24	Commitment to leadership development	100.0	0.0	91.7	8.3	Decrease
25	Humility	92.3	7.7	83.3	16.7	Decrease
26	A dream for their own next chapter	84.6	15.4	75.0	25.0	Decrease

Tables 30-34 display round 2 and round 3 results using the 92 characteristics that achieved consensus. There were 13 participants in this round 2. There were 12 participants in this round 3. As the participants for round 2 and round 3 are not the same, the comparison of percentage consensus data is not exact. Consensus difference is noted by increase, decrease, or same.

Table 31. Characteristics of consensus round 2 and 3 comparison, kingdom-focused

Consensus comparison, kingdom-focused characteristics, question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?					
		Round 2		Round 3	
#	Kingdom-focused Characteristics	Extremely Important or Very Important	Somewhat Important or Not at All Important	Agree	Disagree	Consensus Difference
1	Prayerful	92.3	7.7	100.0	0.0	Increase
2	Servant	84.6	15.4	100.0	0.0	Increase
3	Humility	92.3	7.7	100.0	0.0	Increase
4	Leadership development	92.3	7.7	100.0	0.0	Increase
5	Awareness - learning from others failure	84.6	15.4	100.0	0.0	Increase
6	Personal piety	77.0	23.0	91.7	8.3	Increase
7	Retained passion for ministry versus burn-out	77.0	23.0	91.7	8.3	Increase
8	Realization of mortality	84.6	15.4	91.7	8.3	Increase
9	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	100.0	0.0	100.0	0.0	Same
10	Spiritual Maturity	100.0	0.0	100.0	0.0	Same
11	Love of God before all else – in every area of life	92.3	7.7	91.7	8.3	Same
12	Depersonalizing the situation - "it's not about me"	92.3	7.7	91.7	8.3	Same
13	Desire for others to exceed you. A desire for the next generation to do more than the current generation	92.3	7.7	91.7	8.3	Same
14	Confront tendencies to build own kingdom	100.0	0.0	91.7	8.3	Decrease
15	Point people to Jesus	100.0	0.0	91.7	8.3	Decrease
16	Understanding of the church as kingdom agent/instrument rather than existing for itself	92.3	7.7	83.3	16.7	Decrease

Table 32. Characteristics of consensus round 2 and 3 comparison, team oriented

Consensus comparison, team oriented characteristics question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?					
#	Team Oriented Characteristics	Round 2		Round 3		Consensus Difference
		Extremely Important or Very Important	Somewhat Important or Not at All Important	Agree	Disagree	
1	Entrust responsibility and authority to your team	84.6	15.4	100.0	0.0	Increase
2	Empowering a transition team while stepping back as they step up	84.6	15.4	100.0	0.0	Increase
3	Sharing power	84.6	15.4	91.7	8.3	Increase
4	Adequately developing a matured leadership team	84.6	15.4	91.7	8.3	Increase
5	Genuine interest in collaboration	84.6	15.4	91.7	8.3	Increase
6	Able to train others	76.9	23.1	83.3	16.7	Increase
7	Mutual respect	100.0	0.0	100.0	0.0	Same
8	Recognize that others gifts are as important as that of the senior leader	100.0	0.0	100.0	0.0	Same
9	Humility	92.3	7.7	91.7	8.3	Same
10	Unselfishness - to put other's needs and interests above their own	92.3	7.7	91.7	8.3	Same
11	A willingness to invest time in their leaders	92.3	7.7	91.7	8.3	Same
12	A desire to bring greater glory to God through the expansion of the existing ministry	84.6	15.4	83.3	16.7	Same
13	Common Convictions	84.6	15.4	83.3	16.7	Same
14	Regular, honest communication	100.0	0.0	91.7	8.3	Decrease
15	Willingness to fight natural ego	100.0	0.0	83.3	16.7	Decrease
16	A biblical understanding strengths and weaknesses in light of the spiritual gifts	84.6	15.4	75.0	25.0	Decrease

Table 33. Characteristics of consensus round 2 and 3 comparison, followership

		Round 2		Round 3		
	Consensus comparison, followership characteristics, question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?					
#	Followership Characteristics	Extremely Important or Very Important	Somewhat Important or Not at All Important	Agree	Disagree	Consensus Difference
1	Integrity	92.3	7.7	100.0	0.0	Increase
2	Humility	84.6	15.4	91.7	8.3	Increase
3	Collaboration	84.6	15.4	91.7	8.3	Increase
4	Developing a reproducible ministry - giving abilities away as well as giving away control	84.6	15.4	91.7	8.3	Increase
5	Submissive spirit	77.0	23.1	83.3	16.7	Increase
6	Servant leadership - others centered	100.0	0.0	100.0	0.0	Same
7	Decrease so that transition team can increase	100.0	0.0	100.0	0.0	Same
8	Empower members to contribute to the succession process	100.0	0.0	100.0	0.0	Same
9	Clarity of communication	100.0	0.0	100.0	0.0	Same
10	Optimism	92.3	7.7	91.7	8.3	Same
11	Fidelity in first following Jesus	92.3	7.7	91.7	8.3	Same
12	Personal Piety - not surface level issues of leadership or management; key is found in the heart	92.3	7.7	91.7	8.3	Same
13	Character development through study, reflection, and others	84.6	15.4	83.3	16.7	Same
14	Self sacrifice for congregation and leadership team	100.0	0.0	91.7	8.3	Decrease
15	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	100.0	0.0	91.7	8.3	Decrease
16	Celebrate the success of those around you	100.0	0.0	91.7	8.3	Decrease
17	A sense that mission comes before self	92.3	7.7	83.3	16.7	Decrease
18	Ability to mentor and not be "the teacher."	84.6	15.4	75.0	25.0	Decrease

Table 34. Characteristics of consensus round 2 and 3 comparison, disciple making

#	Disciple-making Characteristics	Round 2		Round 3		Consensus Difference
		Extremely Important or Very Important	Somewhat Important or Not at All Important	Agree	Disagree	
Consensus comparison, disciple making characteristics, question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?						
1	Clear thinking	84.6	15.4	100.0	0.0	Increase
2	Prayerful	84.6	15.4	100.0	0.0	Increase
3	Desire to invest in the next generation for kingdom advancement	92.3	7.7	100.0	0.0	Increase
4	Relational	77.0	23.0	91.7	8.3	Increase
5	Experience in discipling believers	77.0	23.0	91.7	8.3	Increase
6	Devotion to disciple making that replicates	77.0	23.0	91.7	8.3	Increase
7	Vision for biblical community and discipleship	84.6	15.4	91.7	8.3	Increase
8	Passion for the lost	77.0	23.0	83.3	16.7	Increase
9	Willingness to pass on what is known to others.	100.0	0.0	100.0	0.0	Same
10	Mission - centric	100.0	0.0	100.0	0.0	Same
11	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	92.3	7.7	91.7	8.3	Same
12	Consistent preaching and teaching	92.3	7.7	91.7	8.3	Same
13	Intentional	92.3	7.7	91.7	8.3	Same
14	Experience in mentoring future leaders	84.6	15.4	83.3	16.7	Same
15	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	100.0	0.0	91.7	8.3	Decrease
16	Servant's heart - the ability to teach/lead without a condescending spirit	100.0	0.0	91.7	8.3	Decrease

Out of the 92 characteristics for successful transitioning pastors, 39 characteristics realized a consensus increase in round 3, 34 characteristics remained the same in their consensus in round 3, and 19 decreased in consensus in round 3. Table 30 shows the comparison of consensus between rounds 2 and 3 for general characteristics and displays 12 characteristics increasing, 8 characteristics remaining the same, and 6 characteristics decreasing. Table 31 shows the comparison of consensus between rounds 2 and 3 for kingdom-focused characteristic and displays 8 characteristics increasing, 5

characteristics remaining the same, and 3 characteristics decreasing. Table 32 shows the comparison of consensus between rounds 2 and 3 for team oriented characteristic and displays 6 characteristics increasing, 7 characteristics remaining the same, and 3 characteristics decreasing. Table 33 shows the comparison of consensus between rounds 2 and 3 for followership characteristics and displays 5 characteristics increasing, 8 characteristics remaining the same, and 5 characteristics decreasing. Table 34 shows the comparison of consensus between rounds 2 and 3 for disciple-making characteristics and displays 8 characteristics increasing, 6 characteristics remaining the same, and 2 characteristics decreasing.

Research Questions

Research Question 1: The primary research question for this dissertation was "What are the common characteristics and traits that are manifested by a successful transitioning pastor?" Through engagement with experts in the field of pastoral leadership, this research aimed to establish consensus regarding a profile of the successful transitioning pastor. By leveraging a qualitative research study where a Delphi study was utilized, the following list of 92 characteristics was identified and gained the consensus of 14 qualified experts in the field of pastoral leadership. These 92 characteristics were organized around four sub-questions: (1) "How might characteristics that embody kingdom-focus in a transitional leader allow for great success in pastoral transitions?" (2) "How does a transitional leader's view of teamwork and empowering others (shared leadership) impact the success of pastoral transitions?" (3) "How does an intentional philosophy of followership, decreasing so that others may increase, allow a transitional pastor to transition successfully?" (4) "How does engagement in disciple-making help a transitioning pastor be a successful transitioning pastor?"

Research Question 2: "What are the potential weaknesses in current leadership practices of pastors that lead to unsuccessful transitions in pastoral succession?" Experts

were asked in round 1 question 2 to identify characteristics of unsuccessful transitions and their corresponding qualities that overcame these blindspots.[9]   In addition to the list of unsuccessful characteristics, the second question in round 2 asked for the expert to identify their top three traits of a successful transitioning pastor. Building on these responses, the second question in round 3 asked for the expert to rank the top six traits identified in round 2, question 2. In addition, Research question 2, as the inverse of research question 1, was used to explore in greater depth the characteristics of successful transitioning pastors. While the feedback in question 2 provided traits of unsuccessful transitioning pastors, this data was used to reinforce corresponding positive characteristics of transitional leaders (see table 12, question 2). The following tables display the 92 characteristics organized around the five categories of general, kingdom-minded, team oriented, followership, and disciple-making characteristics.

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[9]Question 2 of the round 1 open survey reads, "What are specific potential leadership blindspots of pastors that lead to unsuccessful transitions and which specific character traits or qualities overcome these blindspots?"

Table 35. Consensus characteristics of a successful transitional
pastor: general characteristics

	Expert panel responses to question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?		
#	General Characteristics	MEAN	STD
1	Concern (care for the good of the church)	3.92	0.277
2	Willingness to let go of authority	3.92	0.277
3	Emotional maturity	3.85	0.376
4	A love that is greater for flock than self	3.77	0.439
5	Humility	3.69	0.630
6	Honesty	3.62	0.650
7	Trustworthiness	3.62	0.506
8	Trust in God's providence	3.62	0.506
9	Leading by example	3.54	0.660
10	Spirit-led	3.54	0.660
11	Self-awareness- knowing strengths and weaknesses	3.54	0.660
12	Vision for the future- Desire for Ministry to thrive	3.38	0.768
13	Secure	3.38	0.650
14	Courage	3.38	0.768
15	Commitment to leadership development	3.38	0.506
16	A dream for their own next chapter	3.38	0.768
17	Generosity- willingness to share personal resources to ensure the success of the next pastor	3.38	0.650
18	Servanthood	3.31	0.751
19	Clarity	3.23	0.599
20	Holiness	3.23	0.832
21	Sense of responsibility- ownership for the good and the bad	3.23	0.725
22	Patience to wait on the development of the successor	3.23	0.599
23	Transparency	3.15	0.555
24	Being on the same page with your spouse in regard to transition	3.15	0.899
25	Flexibility	3.08	0.760
26	Optimism	3.08	0.641

Table 36. Consensus characteristics of a successful transitional pastor: kingdom-focused

#	Kingdom-focused Characteristics	MEAN	STD
	Expert panel responses to question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?		
1	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	3.92	0.277
2	Spiritual Maturity	3.69	0.480
3	Love of God before all else – in every area of life	3.69	0.630
4	Confront tendencies to build own kingdom	3.62	0.506
5	Humility	3.54	1.127
6	Prayerful	3.46	0.660
7	Desire for others to exceed you. A desire for the next generation to do more than the current generation	3.46	0.660
8	Point people to Jesus	3.46	0.519
9	Servant	3.38	0.768
10	Depersonalizing the situation - "it's not about me"	3.38	0.870
11	Personal piety	3.31	0.855
12	Understanding of the church as kingdom agent/instrument rather than existing for itself	3.31	0.630
13	Awareness - learning from others failure	3.15	0.555
14	Leadership development	3.15	0.555
15	Retained passion for ministry versus burn-out	3.08	0.760
16	Realization of mortality	3.00	0.577

Table 37. Consensus characteristics of a successful transitional pastor: team oriented

#	Team Oriented Characteristics	MEAN	STD
	Expert panel responses to question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others.		
1	Willingness to fight natural ego	3.77	0.439
2	Humility	3.69	0.630
3	Regular, honest communication	3.62	0.506
4	Mutual respect	3.62	0.506
5	A willingness to invest time in their leaders	3.62	0.650
6	Unselfishness - to put other's needs and interests above their own	3.62	0.650
7	Entrust responsibility and authority to your team	3.54	0.776
8	Recognize that others gifts are as important as that of the senior leader	3.54	0.519
9	Adequately developing a matured leadership team	3.46	0.776
10	A biblical understanding strengths and weaknesses in light of the spiritual gifts	3.31	0.751
11	Sharing power	3.31	0.751
12	Empowering a transition team while stepping back as they step up	3.31	0.751
13	Genuine interest in collaboration	3.31	0.751
14	A desire to bring greater glory to God through the expansion of the existing ministry	3.23	0.832
15	Common Convictions	3.15	0.689
16	Able to train others	2.85	0.801

Table 38. Consensus characteristics of a successful transitional pastor: followership

#	Followership Characteristics	MEAN	STD
Expert panel responses to question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?
1	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	3.85	0.768
2	Clarity of communication	3.85	0.768
3	Celebrate the success of those around you	3.77	0.768
4	Integrity	3.69	0.768
5	Servant leadership - others centered	3.62	0.768
6	A sense that mission comes before self	3.62	0.768
7	Fidelity in first following Jesus	3.62	0.768
8	Self sacrifice for congregation and leadership team	3.62	0.768
9	Humility	3.62	0.768
10	Decrease so that transition team can increase	3.46	0.768
11	Optimism	3.46	0.768
12	Collaboration	3.31	0.768
13	Personal Piety - not surface level issues of leadership or management; key is found in the heart	3.31	0.768
14	Developing a reproducible ministry - giving abilities away as well as giving away control	3.31	0.768
15	Submissive spirit	3.23	0.768
16	Empower members to contribute to the succession process	3.23	0.768
17	Character development through study, reflection, and others	3.15	0.768
18	Ability to mentor and not be "the teacher"	3.15	0.768

Table 39. Consensus characteristics of a successful transitional pastor: disciple-making

#	Disciple-making Characteristics	MEAN	STD
Expert panel responses to question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?
1	Consistent preaching and teaching	3.62	0.650
2	Willingness to pass on what is known to others	3.54	0.519
3	Intentional	3.54	0.660
4	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	3.54	0.519
5	Servant's heart - the ability to teach/lead without a condescending spirit	3.54	0.519
6	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	3.46	0.776
7	Prayerful	3.38	0.768
8	Vision for biblical community and discipleship	3.31	0.751
9	Devotion to disciple making that replicates	3.23	0.832
10	Desire to invest in the next generation for kingdom advancement	3.23	0.599
11	Mission - centric	3.23	0.439
12	Experience in discipling believers	3.15	0.801
13	Experience in mentoring future leaders	3.15	0.689
14	Relational	3.08	0.760
15	Passion for the lost	3.08	0.760
16	Clear thinking	3.08	0.641

Steve Hudson's helpful work offers a useful competency model that can be modified to categorize characteristics of the successful transitioning pastors by placing these characteristics into three distinctive classes: (1) "expert competencies," (2) "core competencies," and (3) "supplemental competencies." Expert competencies are those characteristics that differentiate superior transitional pastors from average transitional pastors. Core competencies are those characteristics that are necessary for the successful transitional pastor. Supplemental competencies may be helpful but perhaps not necessary.[10]

Expert competencies are those characteristics with a mean rating of 4.00 to 3.60. Twenty-seven characteristics had a mean rating that fell in the expert competency range. Core competencies are those characteristics with a mean rating of 3.59 to 3.30. Thirty-seven characteristics had a mean rating that fell in the core competency range. Supplemental competencies are those characteristics with a mean rating of 3.29 to 3.00. Twenty-six characteristics had a mean rating that fell in supplemental competency range. One competency had a mean final rating below 3.00 and was therefore excluded from the model.[11] The rationale surrounding the numerical divisions of 4.00 to 3.60, 3.59 to 3.30, and 3.29 to 3.00, is driven first by the natural breaking of the data into thirds. All but one characteristic achieved a mean rating of 3.00 or higher. A second rationale arises from Steve Hudson's design and implementation of this competency tool.[12] A final rating and

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[10]Joseph Steven Hudson, "A Competency Model for Church Revitalization in Southern Baptist Convention Churches: A Mixed Methods Study" (Ph.D., diss., The Southern Baptist Theological Seminary, 2017).

[11]The team oriented characteristic, *able to train others*, scored a mean of 2.85.

[12]Hudson's precedent work provides a competency model that uses a mean rating scale of 5 to 4.5, 4.4 to 3.5, and 3.4 to 1.5. Hudson's rating scale arose from his use of a five-point Likert scale. This research chose to use a four-point Likert scale as this methodology removes the opportunity for a median response of 3 from an expert which was viewed as unhelpful for the purposes of this research. Hudson's competency range allowed for a breaking of the data into roughly thirds with no competencies needing to be excluded from the model. While Hudson's three ranges encompassed different spreads of 0.5 for expert, 1.0 for core, and 2.0 for supplemental competencies, this research chose ranges that were closer in

classification of characteristics as competencies as expert, core, or supplemental can be

found in tables 40-42.

Table 40. Expert competencies

Mean Rating of Expert Competencies		
Characteristic Grouping	Character Traits	Mean Rating
General Characteristics	Concern (care for the good of the church)	3.92
	Willingness to let go of authority	3.92
	Emotional maturity	3.85
	A love that is greater for flock than self	3.77
	Humility	3.69
	Honesty	3.62
	Trustworthiness	3.62
	Trust in God's providence	3.62
Kingdom-focused Characteristics	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	3.92
	Love of God before all else – in every area of life	3.69
	Spiritual Maturity	3.69
	Confront tendencies to build own kingdom	3.62
Team Oriented Characteristics	Willingness to fight natural ego	3.77
	Humility	3.69
	Unselfishness - to put other's needs and interests above their own	3.62
	A willingness to invest time in their leaders	3.62
	Regular, honest communication	3.62
	Mutual respect	3.62
Followership Characteristics	Clarity of communication	3.85
	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	3.85
	Celebrate the success of those around you	3.77
	Integrity	3.69
	Servant leadership - others centered	3.62
	Self sacrifice for congregation and leadership team	3.62
	Humility	3.62
	Fidelity in first following Jesus	3.62
	A sense that mission comes before self	3.62
Disciple-making Characteristics	Consistent preaching and teaching	3.62

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proportion with spreads of 0.4 for expert, 0.4 for core, and .3 for supplemental competencies. This proportioning allowed, like Hudson's precedent work, the data to divide in similar manner to Hudson's work which the successful transitioning pastor competency model was patterned after.

Table 41. Core competencies

Mean rating of Core Competencies		
Characteristic Grouping	Character Traits	Mean Rating
General Characteristics	Leading by example	3.54
	Spirit-led	3.54
	Self-awareness- knowing strengths and weaknesses	3.54
	Vision for the future- Desire for Ministry to thrive	3.38
	Secure	3.38
	Courage	3.38
	Commitment to leadership development	3.38
	A dream for their own next chapter	3.38
	Generosity- willingness to share personal resources to ensure the success of the next pastor	3.38
	Servanthood	3.31
Kingdom-focused Characteristics	Humility	3.54
	Point people to Jesus	3.46
	Desire for others to exceed you. A desire for the next generation to do more than the current generation	3.46
	Prayerful	3.46
	Servant	3.38
	Depersonalizing the situation - "it's not about me"	3.38
	Understanding of the church as kingdom agent/instrument rather than existing for itself	3.31
	Personal piety	3.31
Team Oriented Characteristics	Recognize that others gifts are as important as that of the senior leader	3.54
	Entrust responsibility and authority to your team	3.54
	Adequately developing a matured leadership team	3.46
	A biblical understanding strengths and weaknesses in light of the spiritual gifts	3.31
	Sharing power	3.31
	Empowering a transition team while stepping back as they step up	3.31
	Genuine interest in collaboration	3.31
Followership Characteristics	Decrease so that transition team can increase	3.46
	Optimism	3.46
	Collaboration	3.31
	Personal Piety - not surface level issues of leadership or management; key is found in the heart	3.31
	Developing a reproducible ministry - giving abilities away as well as giving away control	3.31
Disciple-making Characteristics	Willingness to pass on what is known to others	3.54
	Intentional	3.54
	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	3.54
	Servant's heart - the ability to teach/lead without a condescending spirit	3.54
	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	3.46
	Prayerful	3.38
	Vision for biblical community and discipleship	3.31

Table 42. Supplemental competencies

Mean Rating of Supplemental Competencies		
Characteristic	Character Traits	Mean Rating
General Characteristics	Clarity	3.23
	Sense of responsibility- ownership for the good and the bad	3.23
	Patience to wait on the development of the successor	3.23
	Holiness	3.23
	Transparency	3.15
	Being on the same page with your spouse in regard to transition	3.15
	Flexibility	3.08
	Optimism	3.08
Kingdom-focused Characteristics	Leadership development	3.15
	Awareness - learning from others failure	3.15
	Retained passion for ministry versus burn-out	3.08
	Realization of mortality	3.00
Team Oriented Characteristics	A desire to bring greater glory to God through the expansion of the existing ministry	3.23
	Common Convictions.	3.15
Followership Characteristics	Empower members to contribute to the succession process	3.23
	Submissive spirit	3.23
	Ability to mentor and not be "the teacher"	3.15
	Character development through study, reflection, and others	3.15
Disciple-making Characteristics	Devotion to disciple making that replicates	3.23
	Desire to invest in the next generation for kingdom advancement	3.23
	Mission - centric.	3.23
	Experience in discipling believers	3.15
	Experience in mentoring future leaders	3.15
	Relational	3.08
	Passion for the lost	3.08
	Clear thinking	3.08

Evaluation of the Research Design

The use of an e-Delphi approach for a qualitative research study was an effective way to identify the common characteristics of successful transitioning pastors. In order to procure the desired research findings, in round 1 the expert panel provided the qualitative aspect of this research by submitting characteristics that expressed what makes a transitioning pastor successful. As experts transitioned to round 2, 116 characteristics were narrowed to 92 characteristics that were deemed important or very important characteristics. The end results in round 3 is a profile that includes 92 characteristics: 26

general characteristics, 16 kingdom-focused characteristics, 16 team oriented

characteristics, 18 followership characteristics, and 16 disciple-making characteristics.

Challenges of the Research Design

    The challenges of the qualitative Delphi research design include the following:

1. The e-Delphi methodology provided a convenient platform through which to access participants, but as the study progressed, the experts who began in stage 1 of the study decreased over each round. One potential reason is the busyness of the participants. The reasoning for this phenomenon is not completely understood as the time investment required for each survey diminished as the research progressed. The initial survey took no more than 30 minutes, the second round survey took no more than 20 minutes, and the final round took 10 minutes. Reasons cited by three participants for not finishing the study were family health, increased work responsibility with a change in job description, as well as one participant's confusion over the research design.

2. The unexpected, but welcomed number of characteristics provided (n = 116) by the experts in the initial round of the survey created a challenge when it came to the statistical analysis of the data in the second stage of the study. While the numbers of characteristics identified as important and very important in the second round were larger than expected (n = 92), the organization of characteristics around themes that arise in pastoral transition allowed the characteristics to be clustered in groups making the data more accessible. This type of clustered analysis was driven by two primary rationales. The first rationale was to give a more effective organizational layout to the participants. With the characteristics organized into groups or clusters, the participants were able to focus on the desired area of study. The first example of this grouping would be the initial question (rounds 2 and 3), which focused on the general characteristics of transitioning pastors. Another example would be the third question (rounds 2 and 3), which focused on the more specific aspect of kingdom-minded characteristics. The second reason for grouping characteristics around themes was to provide a mechanism for reflection in light of the literature review conducted at the beginning of this research.

3. A potential area for improvement would be the clarity of questions' wording. Since the research, as is consistent with Delphi studies, began with an open-ended questionnaire, terms or concepts could have allowed for a variety of interpretations among the experts.[13] To minimalize ambiguity, the first round questionnaire was pilot tested for clarity. In addition, clarification of terms was provided for more specific questions, e.g. kingdom-minded, team oriented, followership, and disciple-making. Also to avoid confusion, each survey specified that the outgoing or leaving pastor was the subject in view. Because of the Delphi study design, participants were able to provide feedback throughout the process, also allowing for greater clarity.

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    [13]Kim Quaile Hill and Jib Fowles, "The Methodological Worth of the Delphi Forecasting Technique," *Technological Forecasting and Social Change* 7, no. 2 (1975): 179-92.

4. Introductory instructions for the first round questionnaire could have been clearer. Two participants who agreed to participate in the study gave no feedback to the initial round of research. Greater communication may have helped these individuals see the task as more attainable. Perhaps they were overwhelmed by the time commitment of the first round questionnaire. If conducted again, this study could also provide more detailed instructions as to the nature of the study. For example, a more detailed explanation regarding the importance of feedback when an expert chose to remain outside of consensus may have resulted in greater feedback. Although there is a danger in biasing responses, more examples could have been provided with certain questions to give clarity.

5. While anonymity was maintained for the entirety of this Delphi study, some believe that "characteristic can detract from the credibility of the study and can make the experts inaccessible to future researchers and practitioners."[14] The reputation of an expert can lead to credibility. In contrast, the value added through anonymity is the mitigation of peer pressure on one participant to align their answer with another expert's answer because of his or her reputation. Appendices 20 and 21 help to support the respondents' credibility. Finally, it should be noted that anonymity is a non-negotiable trait of a Delphi study.

6. Given that the first round's questionnaire was limited to text that could be given in each answer, the qualitative aspect of the research may have been unnecessarily limited. Yet, there was an abundance of data gathered from the 14 participants' responses to the seven open-ended questions. A phone interview may have given the participants greater opportunity to respond or ask clarifying questions, yet for the sake of consistency in the application of the methodology, an e-survey was preferable. One strength of utilizing an online platform for the research was that participants were not limited in the amount of time that they could invest in each survey, allowing them to work at their own pace.

Strengths of Research Design

The strengths of the qualitative Delphi research design include the following:

1. The application of the e-Delphi methodology allowed multiple interactions via technology without requiring travel or impeding the speed by which information was gathered.

1. The submission of short surveys to the experts allowed for rapid completion of each survey.

2. As described by Skulmoski, Harman, and Krahn, the Delphi study is a "flexible research technique well-suited when there is incomplete knowledge about phenomena."[15] As shown in the literature review of chapter 2 of this research, while characteristics or traits of successful transitioning pastors are discussed, the idea of a

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[14]Ravonne A. Green, "The Delphi Technique in Educational Research," *SAGE Open* 4, no. 2 (April 2014): 6.

[15]Skulmoski, Harman, and Krahn, "The Delphi Method for Graduate Research," 12.

character profile for a successful transitioning pastor has not been scientifically researched. Since this is an area of incomplete knowledge, the Delphi study was an appropriate research method.

3. A typical challenge for a Delpi study is a high rate of attrition.[16] In this type of Delphi study where a homogeneous group of participants was used, 10-15 experts are desired. This study began with 16 participants agreeing to be part of the expert panel and finished with 12 participants completing round 3. Additionally, 2 of the 4 participants that did not participate in the final round dropped out before data from round 1 was collected, leaving the realized number of participants at 14. Therefore, despite attrition of participants, the number of experts to complete the study was satisfactory.

4. A Delphi study requires a panel of experts. In this study, qualified participants were asked to identify their experience in pastoral transition, specifically that they had written extensively, were seasoned practitioners, or were insightful contributors to current Christian thought surrounding pastoral transition. Each participant identified how many years experience had been reached in the areas of consultant, church practitioner, or Christian leader with a resultant average of 30.1 years of experience. Given that the sampling was identified as a potential weakness of the design, a specific group of individuals was identified as desirable to participate in this study. Sampling was not based on convenience and while the results cannot be generalized as in the case of random sampling, the results can apply to transitional leaders that match the qualifications of the research participants.

Conclusion

Chapter 3 presented the research methodology that this dissertation would employ and chapter 4 described how the data for this research was gathered, analyzed, and summarized. In addition, the Delphi methodology was evaluated as to its weaknesses and strengths. Chapter 5 offers an interpretation of the findings analyzing the results, exploring how it contributes to the current conversation, and making recommendations how this research can be used and built upon.

The results of the research demonstrate that 92 characteristics categorized over 5 groupings provide a character profile for a successful transitioning pastor. While each characteristic received a statistical ranking of importance within each category, the overall results provide opportunity to consider three different applications: (1) the understanding of which characteristics are important to the success of a transitional

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[16]Hill and Fowles, "The Methodological Worth."

pastor, (2) the resources to compare characteristics that have been statistically measured with those that have been assumed or argued for in the previous literature, and (3) the possibility to focus Christian leaders, who are currently or will in the future be transitioning pastors, on the desired profile of a successful transitional leader.

CHAPTER 5

CONCLUSION

The purpose of this qualitative study was to commission a panel of experts to develop a leadership profile of characteristics of the successful transitioning pastor.   A Delphi study was initiated to establish the characteristics of the successful transitioning pastor. These characteristics were examined using the lens of five categories: general, kingdom-minded, team oriented, followership, and disciple-making characteristics. Once identified, these characteristics were used to create a competency model for pastors who are facing transition.

The identification of characteristics of the successful transitioning pastor and the creation of a competency model seek to address the gap in the current literature concerning the characteristics of the successful transitioning pastor.[1] While the current literature offers characteristics of the successful transitioning pastor (see appendix 3), the thrust of the literature is a call for pastors to lead through casting a vision for transition and initiating specific transition practices. Yet, the literature does not seek to systematically identify the most important characteristics of the transitional pastor or place emphasis on the character development of the transitional pastor in order to become the right leader for transition.[2]

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[1]The ideals of character and personal development are not foreign to the conversation of leadership as seen in Jim Collins' level 5 leader, which combines humility and fierce resolve. Jim Collins, *Good to Great: Why Some Companies Make the Leap . . . And Others Don't* (New York: Harper Business, 2011).

[2]The three levels of transitional leadership in view are proclaiming or casting vision for transition, becoming or being the right leader for transition, and empowering others for transition. Of these three levels, the first (proclaiming a vision for transition) and the third (empowering others for transition)

This research extends the conversation of the current literature by systematically identifying characteristics and then examining these characteristics using the categories: general, kingdom-minded, team oriented, followership, and disciple-making characteristics. The identification of these characteristics expands the current research on transitional pastoral leadership and provides data for leadership competencies that are useful for developing models of self-assessment, leadership development, and academic training.

This chapter seeks to answer the research question, provide an assessment of the contribution of the research to the precedent literature, and offer recommendations for the practice related to this research.

Analysis of Results

The purpose of this qualitative research was to answer the question, "What are the common characteristics and traits that are manifested by a successful transitioning pastor?" In order to answer this question, a Delphi study was conducted with a homogenous group of 14 experts that sought to discover characteristics of consensus for the successful transitioning pastor.

Methodology

Round 1 of the research involved a free-form seven-question survey based on the research questions and sub-questions (see appendix 8). This survey sought to discover, from the perspectives of the respondents, what characteristics are important to the pastor facing transition. These characteristics were organized into five themes: general, kingdom-minded, team oriented, followership, and disciple-making

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have been addressed by the literature. The area that the current literature, and therefore conversation, has not been intentionally focused on is becoming the right leader for a pastoral transition.

characteristics. The round 1 analysis yielded 116 characteristics that served as the basis for round 2 of this study (see table 11).

Round 2 of the research was a Likert-type survey in which experts were asked to rate each of the characteristics from round 1 on its level of importance as it relates to the successful transitioning pastor. After the survey was conducted, experts were given the opportunity to revise their responses and 92 characteristics remained that met the definition of consensus.

Round 3 of this research was a second iteration of the round 2 survey, but only statements that met consensus were included. Instead of a Likert-type survey, a simple dichotomous scale ("agree"/"disagree") was used. All 92 characteristics that achieved consensus in the round 2 survey achieved consensus in the round 3 survey. In conclusion, after this three-round Delphi study was completed, 92 characteristics met the definition of consensus for characteristics of the successful transitioning pastor.

Consensus Characteristics

In order to answer the research question, experts in the field of transitional leadership were consulted.[3] Experts were selected on the basis of the following

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[3]As outlined in the previous chapter, research question 1 stated, "What are the common characteristics and traits that are manifested by a successful transitioning pastor?" A list of 92 characteristics was identified and gained the consensus of 14 qualified experts in the field of pastoral leadership. These 92 characteristics were organized around four sub-questions: (1) "How might characteristics that embody kingdom-focus in a transitional leader allow for great success in pastoral transitions?" (2) "How does a transitional leader's view of teamwork and empowering others (shared leadership) impact the success of pastoral transitions?" (3) "How does an intentional philosophy of followership, decreasing so that others may increase, allow a transitional pastor to transition successfully?" (4) "How does engagement in disciple-making help a transitioning pastor be a successful transitioning pastor?" Research question 2 stated, "What are the potential weaknesses in current leadership practices of pastors that lead to unsuccessful transitions in pastoral succession?" In addition to the list of unsuccessful characteristics, the second question in round 2 asked for the expert to identify their top three traits of a successful transitioning pastor. Building on these responses, the second question in round 3 asked for the expert to rank the top six traits identified in round 2, question 2. In addition, Research question 2, as the inverse of research question 1, was used to explore in greater depth the characteristics of successful transitioning pastors. While the feedback in question 2 provided traits of unsuccessful transitioning pastors, this data was used to reinforce corresponding positive characteristics of transitional leaders (see table 12, question 2).

qualifying parameters: (1) pastors who have transitioned successfully, (2) consultants who have written on pastoral transitions, (3) individuals who have taken part in highly publicized or documented transitions, (4) experts in pastoral leadership, (5) mega-church pastors who are currently facing pastoral transitions, (6) clarion voices within the Christian community, and (7) denominational leaders who have high awareness of the inner workings of pastoral transition within their respective denominations. Each expert qualified in at least two of these parameters. Experts were also selected for the duration of their experience in the areas of a consultant, pastoral practitioner, or Christian leadership. On average experts had 30.1 years experience.

The questions in all three rounds of Delphi study were built on five themes that arose from the characteristics found in the current literature. In addition to general characteristics, characteristics in the areas of kingdom-focus, team, followership, and disciple-making were investigated. Ultimately, using consensus, the desired outcome was to establish a list of characteristics in each of the thematic areas related to successful pastoral transition.

The first of the five themes looked at general characteristics of the successful transitioning pastor. In this area, 26 characteristics were identified that met the definition of consensus. Tables 43, 44, 45, 46, and 48 display the characteristics identified for the five themes and their mean rating.

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Twenty-Six General Characteristics
That Achieved Consensus

Table 43. General characteristics ranked by mean

General Characteristics, question 1: What specific character traits or qualities do successful transitioning pastors demonstrate?		Mean Rating
#	Character Traits	
1	Concern (care for the good of the church)	3.92
2	Willingness to let go of authority	3.92
3	Emotional maturity	3.85
4	A love that is greater for flock than self	3.77
5	Humility	3.69
6	Honesty	3.62
7	Trustworthiness	3.62
8	Trust in God's providence	3.62
9	Leading by example	3.54
10	Spirit-led	3.54
11	Self-awareness- knowing strengths and weaknesses	3.54
12	Vision for the future- Desire for Ministry to thrive.	3.38
13	Secure	3.38
14	Courage	3.38
15	Commitment to leadership development	3.38
16	A dream for their own next chapter	3.38
17	Generosity—willingness to share personal resources to ensure the success of the next pastor	3.38
18	Servanthood	3.31
19	Clarity	3.23
20	Sense of responsibility- ownership for the good and the bad	3.23
21	Patience to wait on the development of the successor	3.23
22	Holiness	3.23
23	Transparency	3.15
24	Being on the same page with your spouse in regard to transition	3.15
25	Flexibility	3.08
26	Optimism	3.08

At the top of the list of general characteristics of the successful transitioning pastor are two characteristics: (1) concern (care for the good of the church) and (2) willingness to let go of authority. These two characteristics are not surprising as a pastoral transition defines the future well-being of the church and requires that the leader in a high position of authority to relinquish that authority. Characteristic 4, a love that is greater for flock than self, could be considered synonymous with concern (care for the

good of the church). Characteristic 5, humility, could be considered closely tied with a willingness to let go of authority.

There are several thematic elements identified in these characteristics. One thematic characteristic that is high in the ranking is the characteristic of emotional maturity. Emotional maturity is broad in its nature and could encompass many characteristics that fall lower in the ranking such as humility (5), honesty (6), trustworthiness (7), secure (13), courage (14), flexible (25), and optimism (26). A theme reflecting pure leadership skills are represented in characteristics leading by example (9), self-awareness (knowing strengths and weaknesses) (11), vision for the future (a desire for the ministry to thrive (12), commitment to leadership development (15), clarity (19), sense of responsibility (ownership for the good and the bad) (20), patience to wait on the development of the successor (21), and transparency (23). The data also reflected a value for personal awareness in the characteristics of a dream for their own next chapter (16), generosity (willingness to share personal resources to ensure the success of the next pastor) (17), and being on the same page with your spouse in regard to transition (24). Also broadly represented are characteristics that reflect godliness: trust in God's providence (8), Spirit-led (10), servanthood (18), and holiness (22).

When divided into the competencies of expert, core, and supplemental, it is interesting to note that characteristics which scored within the expert competency range (a mean of 3.6 or higher) did not include pure leadership skills or aspects of personal awareness. Also, characteristics involving vision casting and engaging in transitional processes such as (1) vision for the future, (2) clarity, (3) a dream for the future, and (4) patience to wait on the development of a successor fell into the lower core and supplemental competencies. Characteristics valued in the literature which failed to gain consensus were: (1) announce a definite retirement date one year in advance, (2) the capacity and desire to develop as a leader, (3) perceptive about qualities needed in their successor, (4) systematic – strategically able to plan.

Sixteen Kingdom-Focused Characteristics
That Achieved Consensus

The following table displays the sixteen kingdom-focused characteristics that achieved consensus and their mean rating in descending order.

Table 44. Kingdom-focused characteristics ranked by mean

Kingdom-focused, question 3: What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?		
#	Character Traits	Mean Rating
1	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	3.92
2	Love of God before all else – in every area of life	3.69
3	Spiritual Maturity	3.69
4	Confront tendencies to build own kingdom	3.62
5	Humility	3.54
6	Point people to Jesus	3.46
7	Desire for others to exceed you. A desire for the next generation to do more than the current generation	3.46
8	Prayerful	3.46
9	Servant	3.38
10	Depersonalizing the situation - "it's not about me"	3.38
11	Understanding of the church as kingdom agent/instrument rather than existing for itself	3.31
12	Personal piety	3.31
13	Leadership development	3.15
14	Awareness - learning from others failure	3.15
15	Retained passion for ministry versus burn-out	3.08
16	Realization of mortality	3.00

The four highest scoring characteristics of a kingdom-focused transitional leader, (1) pursue God's glory versus self-glory, (2) love God before all else, (3) spiritual maturity, and (4) confront tendencies to build own kingdom, are all centered on God's glory versus the leader's glory. The proactive traits of pursuing God's glory, God being our primary affection, spiritual maturity, and confronting tendencies to build own kingdom address the potential dark side of leadership such as idolatry of ministry, self-aggrandizement, self-worship, pride, and the pursuit of power. A pure pursuit for God's glory is the difference between an expert level competency transitional pastor (3.6 or higher) and a core level competency transitional pastor.

Christ-like characteristics such as humility, evangelistic, prayerful, servant, and personal piety are at the heart of the core competencies. While included as kingdom-minded characteristics, character traits that would be identified with leadership acumen such as leadership development, situational awareness, and self-awareness were rated statistically as supplemental characteristics.

The term kingdom-focused was one of the character traits rising out of the literature. Other character traits in the kingdom-minded category that overlapped with the twenty-seven traits found in the literature were humility, prayerful, and personal awareness. This research helps provide a greater understanding of kingdom-focused and points to the need of pursuing God's glory.

Sixteen Team Oriented Characteristics
That Achieved Consensus

The following table displays the sixteen team oriented characteristics that achieved consensus and their mean rating in descending order.

Table 45. Team oriented characteristics ranked by mean

Team oriented, question 4: What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others.		
#	Character Traits	Mean Rating
1	Willingness to fight natural ego	3.77
2	Humility	3.69
3	Unselfishness - to put other's needs and interests above their own	3.62
4	A willingness to invest time in their leaders	3.62
5	Regular, honest communication	3.62
6	Mutual respect	3.62
7	Recognize that others' gifts are as important as that of the senior leader	3.54
8	Entrust responsibility and authority to your team	3.54
9	Adequately developing a matured leadership team	3.46
10	A biblical understanding strengths and weaknesses in light of the spiritual gifts	3.31
11	Sharing power	3.31
12	Empowering a transition team while stepping back as they step up	3.31
13	Genuine interest in collaboration	3.31
14	A desire to bring greater glory to God through the expansion of the existing ministry	3.23
15	Common Convictions.	3.15
16	Able to train others.	2.85

The expert panel placed the characteristics of (1) a willingness to fight ego and (2) the pursuit of humility as top priorities for being team oriented. Following in a four-way tie and rounding out the expert competencies level were (3) unselfishness, (4) investing in others, (5) communication, and (6) mutual respect. Core competencies encompassed the two themes of sharing power and understanding giftedness. Supplemental competencies included a desire for God's glory, which ties back to the theme of kingdom-focused.

The traits that corresponded to the characteristics found in the literature were (1) humility, (2) unselfish, and (3) ability to train others. One interesting occurrence was the low score for the characteristic able to train others, which while achieving consensus did not score high enough to achieve a supplementary competency rating.

Eighteen Followership Characteristics
That Achieved Consensus

The highest priorities for followership characteristics were the dual traits of (1) clarity of communication and (2) love for the church. These two traits reflect a tendency of the expert panel to view followership in two different lights. One perspective was followership viewed in the context of others following the transitional pastor's leadership, e.g. (3) celebrate the success of those around you. Another perspective was followership viewed with the transitional pastor being the follower, e.g. (4) integrity. The latter definition, which was communicated in the definition of followership, was the desired perspective of the researcher.[4] Five other characteristics received an equal statistical ranking and achieved expert competency status. These characteristics include

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[4]The following definition for *followership* was given to the expert panel. The term *followership* is best depicted by John the Baptist and Jesus. John the Baptist, in a prophetic leadership context, declares that he should decrease and Christ should increase (John 3:30). Jesus, while often viewed as the ideal leader, can also be seen as a follower in that His primary mission on earth was to fulfill the will of His Father (John 6:34, 10:30). Applied to the pastoral transition, a leader who practices followership is a leader who is willing to decrease aspects of his leadership so that others around him may increase their leadership.

(1) servant leadership, (2) self-sacrifice, (3) humility, (4) fidelity to Jesus, and (5) mission before self. Half of the followership characteristics were considered to be expert competencies potentially reflecting a statistical emphasis toward this thematic category for transitional leadership. Table 47 offers a statistical count of expert competencies, total number of characteristics, and comparison of percentage of expert competencies for each of the five thematic categories for transitional characteristics.

Table 46 displays the eighteen followership characteristics that achieved consensus and their mean rating in descending order.

Table 46. Followership characteristic ranked by mean

Followership, question 5: What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?		
#	Character Traits	Mean Rating
1	Clarity of communication	3.85
2	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	3.85
3	Celebrate the success of those around you	3.77
4	Integrity	3.69
5	Servant leadership - others centered	3.62
6	Self sacrifice for congregation and leadership team	3.62
7	Humility	3.62
8	Fidelity in first following Jesus	3.62
9	A sense that mission comes before self	3.62
10	Decrease so that transition team can increase	3.46
11	Optimism	3.46
12	Collaboration	3.31
13	Personal Piety - not surface level issues of leadership or management; key is found in the heart	3.31
14	Developing a reproducible ministry - giving abilities away as well as giving away control	3.31
15	Empower members to contribute to the succession process	3.23
16	Submissive spirit	3.23
17	Ability to mentor and not be "the teacher"	3.15
18	Character development through study, reflection, and others	3.15

**Percentage of Characteristics in Each
Thematic Category that Scored
as an Expert Competency**

Table 47. Thematic comparison of expert competencies

Thematic Comparison for Expert Competencies: Count, Total Characteristics, and Percentage			
Thematic categories for Characteristics	Count of Expert Competencies	Total number of Characteristics	Percentage of Characteristics in Each Thematic Category that Scored as an Expert Competency
Followership Characteristics	9	18	50.00
Team Oriented Characteristics	6	16	37.50
General Characteristics	8	26	31.00
Kingdom-focused Characteristics	4	16	25.00
Disciple-making Characteristics	1	16	6.25

Followership characteristics such as (1) decrease so that transition team can increase, (2) optimism, (3) collaboration, (4) personal piety, and (5) developing a reproducible ministry, were identified as core competencies. While included as followership characteristics, character traits that would be identified with leadership acumen such as (1) empower members to contribute to the succession process, (2) submissive spirit, (3) ability to mentor and not be "the teacher," and (4) character development through study, reflection, and others, were rated statistically as supplemental characteristics.

Other character traits in this thematic category that overlapped with the 27 traits found in the literature were integrity and able to mentor. These statistical findings reflect a higher value expressed by the expert panel for characteristics within the followership category when compared to the other themes of general, kingdom-minded, team oriented, and disciple-making characteristics.

**Sixteen Disciple-Making Characteristics
That Achieved Consensus**

The following table displays the sixteen disciple-making characteristics that achieved consensus and their mean rating in descending order.

Table 48. Disciple-making characteristic ranked by mean

#	Character Traits	Mean Rating
...	Disciple-making, question 6: What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?	
1	Consistent preaching and teaching	3.62
2	Willingness to pass on what is known to others	3.54
3	Intentional	3.54
4	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	3.54
5	Servant's heart - the ability to teach/lead without a condescending spirit	3.54
6	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	3.46
7	Prayerful	3.38
8	Vision for biblical community and discipleship	3.31
9	Devotion to disciple making that replicates	3.23
10	Desire to invest in the next generation for kingdom advancement	3.23
11	Mission - centric	3.23
12	Experience in discipling believers	3.15
13	Experience in mentoring future leaders	3.15
14	Relational	3.08
15	Passion for the lost	3.08
16	Clear thinking	3.08

Only one disciple-making trait, consistent teaching and preaching, fell statistically within the expert competency level. It is interesting that in light of the highly relational definition offered for disciple-making by the researcher, a very limited relational characteristic of preaching and teaching was considered of greatest priority.[5] The characteristic of consistent preaching and teaching was followed second by the (2) willingness to pass on what is known to others, (3) intentionality, (4) unselfish spirit, and (5) servant's heart.[6] It is perhaps surprising that the characteristics of giving of oneself so that others may grow and flourish, prayerful, and vision for a biblical community and discipleship fall at the lower end of core competencies for disciple-making.

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[5]This result is telling as referenced in chap. 2n130.

[6]A shepherd's heart is a better descriptive modifier as "the ability to teach/lead without a condescending spirit" is in the desired characteristic in view.

Seven of sixteen characteristics for disciple-making statistically fell into the supplemental competency level making disciple-making the thematic category with the highest percentage of supplemental characteristics. Table 49 offers a statistical count of supplemental competencies, total number of characteristics, and comparison of percentage of supplemental competencies for each of the five thematic categories for transitional characteristics.

Percentage of Characteristics in Each
Thematic Category that Scored
as a Supplemental Competency

Table 49. Thematic comparison of supplemental competencies

Thematic Supplemental Competencies Comparison: Count, Total Characteristics, and Percentage			
Thematic categories for Characteristics	Count of Supplemental Competencies	Total number of Characteristics	Percentage of Characteristics in Each Thematic Category that Scored as a Supplemental Competency
Disciple-making Characteristics	8	16	50.00
General Characteristics	8	26	31.00
Kingdom-focused Characteristics	4	16	25.00
Followership Characteristics	4	18	22.20
Team Oriented Characteristics	3	16	8.80

Key characteristics of disciple-making such as (1) replication, (2) generational investment, (3) experience in discipleship and mentoring future leaders were considered supplemental categories. Evangelistic characteristics such as (1) mission-centric and (2) passion for the lost also scored as supplemental competencies. Juxtaposed with the highest mean score being garnered for the low relational characteristic of consistent preaching and teaching, the characteristic of being relational tied for the lowest mean score with the characteristics of passion for the lost and clear thinking.

Contribution of Research to the Precedent Literature

The literature review for this research had two outcomes related to the research question, "What are the common characteristics and traits that are manifested by a successful transitioning pastor?" The first outcome was to identify a comprehensive list of the characteristics of the successful transitional pastor mentioned in the current literature. The second outcome was to identify broad themes which would encompass the documented characteristics.

The result of the first desired outcome was twenty-seven characteristics identified in the literature: (1) disciple-maker, (2) secure, (3) humble, (4) kingdom-focused, (5) encourager, (6) trustworthy, (7) mentor, (8) good sense of humor, (9) sacrificial, (10) wise, (11) coach, (12) team player, (13) person of prayer, (14) person of integrity, (15) team oriented, (16) compassion, (17) transparent, (18) approachable, (19) hard working, (20) learner, (21) called, (22) intelligent, (23) tenacious, (24) selfless, (25) kind, (26) emotionally intelligent, and (27) personally aware. It was also realized in identifying this outcome that the literature did not directly seek to establish the traits of a successful transitional leader.

The result of the second desired outcome were four broad themes which encompassed the 27 characteristics: a successful transitioning pastor must (1) be kingdom-minded, (2) leverage teams while empowering others, (3) embrace followership, and (4) engage in disciple-making or development of a leadership pipeline (see table 8).

Current Literature Contrasted with Research Findings

Tables 50-54 display, in bold, the characteristics that aligned between the 27 characteristics identified through the literature review and the 92 characteristics given by the expert panel.[7]

Characteristics' Alignment between Literature Review and Expert Panel Findings

Table 50. Characteristics' alignment between literature review and expert panel findings: General characteristics ranked by mean

#	General Characteristics	Mean Rating
1	Concern (care for the good of the church)	3.92
2	Willingness to let go of authority	3.92
3	**Emotional maturity**	3.85
4	A love that is greater for flock than self	3.77
5	**Humility**	3.69
6	Honesty	3.62
7	**Trustworthiness**	3.62
8	Trust in God's providence	3.62
9	Leading by example	3.54
10	Spirit-led	3.54
11	**Self-awareness- knowing strengths and weaknesses**	3.54
12	Vision for the future- Desire for Ministry to thrive	3.38
13	**Secure**	3.38
14	Courage	3.38
15	Commitment to leadership development	3.38
16	A dream for their own next chapter	3.38
17	**Generosity- willingness to share personal resources to ensure the success of the next pastor**	3.38
18	Servanthood	3.31
19	Clarity	3.23
20	Sense of responsibility- ownership for the good and the bad	3.23
21	Patience to wait on the development of the successor	3.23
22	Holiness	3.23
23	**Transparency**	3.15
24	Being on the same page with your spouse in regard to transition	3.15
25	Flexibility	3.08
26	Optimism	3.08

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[7]Two of the four thematic groupings—kingdom minded and team oriented—are counted as part of the twenty-seven characteristics found in the literature review.

Table 51. Characteristics' alignment between literature review and expert panel findings: Kingdom-focused characteristics ranked by mean

#	Kingdom-focused Character Traits	Mean Rating
1	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	3.92
2	Love of God before all else – in every area of life	3.69
3	Spiritual Maturity	3.69
4	Confront tendencies to build own kingdom	3.62
5	**Humility**	3.54
6	Point people to Jesus.	3.46
7	Desire for others to exceed you. A desire for the next generation to do more than the current generation	3.46
8	**Prayerful**	3.46
9	Servant	3.38
10	Depersonalizing the situation - "it's not about me"	3.38
11	Understanding of the church as kingdom agent/instrument rather than existing for itself	3.31
12	Personal piety	3.31
13	Leadership development.	3.15
14	**Awareness - learning from others failure**	3.15
15	Retained passion for ministry versus burn-out	3.08
16	Realization of mortality	3.00

Table 52. Characteristics' alignment between literature review and expert panel findings: Team oriented characteristics ranked by mean

#	Team Oriented Character Traits	Mean Rating
1	Willingness to fight natural ego	3.77
2	**Humility**	3.69
3	**Unselfishness - to put other's needs and interests above their own**	3.62
4	A willingness to invest time in their leaders	3.62
5	Regular, honest communication	3.62
6	Mutual respect	3.62
7	Recognize that others gifts are as important as that of the senior leader	3.54
8	Entrust responsibility and authority to your team	3.54
9	Adequately developing a matured leadership team	3.46
10	A biblical understanding strengths and weaknesses in light of the spiritual gifts	3.31
11	Sharing power	3.31
12	Empowering a transition team while stepping back as they step up	3.31
13	Genuine interest in collaboration	3.31
14	A desire to bring greater glory to God through the expansion of the existing ministry	3.23
15	Common Convictions	3.15
16	**Able to train others**	2.85

Table 53. Characteristics' alignment between literature review and expert panel findings: Followership characteristics ranked by mean

#	Followership - Character Traits	Mean Rating
1	Clarity of communication	3.85
2	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	3.85
3	Celebrate the success of those around you	3.77
4	**Integrity**	3.69
5	Servant leadership - others centered	3.62
6	Self sacrifice for congregation and leadership team	3.62
7	Humility	3.62
8	Fidelity in first following Jesus	3.62
9	A sense that mission comes before self	3.62
10	Decrease so that transition team can increase	3.46
11	Optimism	3.46
12	Collaboration	3.31
13	Personal Piety - not surface level issues of leadership or management; key is found in the heart	3.31
14	Developing a reproducible ministry - giving abilities away as well as giving away control	3.31
15	Empower members to contribute to the succession process	3.23
16	Submissive spirit	3.23
17	**Ability to mentor and not be "the teacher"**	3.15
18	Character development through study, reflection, and others	3.15

Table 54. Characteristics' alignment between literature review and expert panel findings: Disciple-making characteristics ranked by mean

#	Disciple-making Character Traits	Mean Rating
1	Consistent preaching and teaching	3.62
2	Willingness to pass on what is known to other	3.54
3	Intentional	3.54
4	**Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth**	3.54
5	Servant's heart - the ability to teach/lead without a condescending spirit	3.54
6	**The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish**	3.46
7	**Prayerful**	3.38
8	**Vision for biblical community and discipleship**	3.31
9	Devotion to disciple making that replicates	3.23
10	Desire to invest in the next generation for kingdom advancement	3.23
11	Mission - centric	3.23
12	Experience in discipling believers	3.15
13	Experience in mentoring future leaders	3.15
14	Relational	3.08
15	**Passion for the lost**	3.08
16	Clear thinking	3.08

Of the 27 traits identified in the literature review, 20 were re-affirmed by the expert panel. The characteristics of good sense of humor and compassionate were identified by the expert panel as characteristics of transitioning pastors, but these traits failed to gain consensus. The five characteristics of (1) being wise, (2) hard working, (3) intelligent, (4) tenacious, and (5) kind, were not identified by the expert panel as characteristics that were important to the successful transitioning pastor.[8]

A New Competency Model

Not only did the research provide a comprehensive successful transitioning pastor profile (STPP), but it also provided a new competency model for the transitioning pastor. This competency model is divided into three competencies: expert, core, and supplemental competencies. Expert competencies are those characteristics with a mean rating of 4.00 to 3.60. Core competencies are those characteristics with a mean rating of 3.59 to 3.30. Supplemental competencies are those characteristics with a mean rating of 3.29 to 3.00. The competency models for general, kingdom-minded, team oriented, followership, and disciple-making are given in tables 55-59.[9]

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[8]The character of emotional intelligence is being considered synonymous with emotional maturity.

[9]See appendix 23 for a collated table. For further explanation of competency ranges see chap. 4n12.

General Characteristics'
Competency Ranking

Table 55. General characteristics by competencies

General Characteristics		
Competencies	Character Traits	Mean Rating
Expert	Concern (care for the good of the church)	3.92
	Willingness to let go of authority	3.92
	Emotional maturity	3.85
	A love that is greater for flock than self	3.77
	Humility	3.69
	Honesty	3.62
	Trustworthiness	3.62
	Trust in God's providence	3.62
Core	Leading by example	3.54
	Spirit-led	3.54
	Self-awareness- knowing strengths and weaknesses	3.54
	Vision for the future- Desire for Ministry to thrive	3.38
	Secure	3.38
	Courage	3.38
	Commitment to leadership development	3.38
	A dream for their own next chapter	3.38
	Generosity- willingness to share personal resources to ensure the success of the next pastor	3.38
	Servanthood	3.31
Supplemental	Clarity	3.23
	Sense of responsibility- ownership for the good and the bad	3.23
	Patience to wait on the development of the successor	3.23
	Holiness	3.23
	Transparency	3.15
	Being on the same page with your spouse in regard to transition	3.15
	Flexibility	3.08
	Optimism	3.08

**Kingdom-Focused Characteristics'
Competency Ranking**

Table 56. Kingdom-focused characteristics by competencies

Kingdom-focused		
Competencies	Character Traits	Mean Rating
Expert	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	3.92
	Love of God before all else – in every area of life	3.69
	Spiritual Maturity	3.69
	Confront tendencies to build own kingdom	3.62
Core	Humility	3.54
	Point people to Jesus	3.46
	Desire for others to exceed you. A desire for the next generation to do more than the current generation	3.46
	Prayerful	3.46
	Servant	3.38
	Depersonalizing the situation - "it's not about me"	3.38
	Understanding of the church as kingdom agent/instrument rather than existing for itself	3.31
	Personal piety	3.31
Supplemental	Leadership development	3.15
	Awareness - learning from others failure	3.15
	Retained passion for ministry versus burn-out	3.08
	Realization of mortality	3.00

**Team Oriented Characteristics'
Competency Ranking**

Table 57. Team oriented characteristics by competencies

Team Oriented		
Competencies	Character Traits	Mean Rating
Expert	Willingness to fight natural ego	3.77
	Humility	3.69
	Unselfishness - to put other's needs and interests above their own	3.62
	A willingness to invest time in their leaders	3.62
	Regular, honest communication	3.62
	Mutual respect	3.62
Core	Recognize that others gifts are as important as that of the senior leader	3.54
	Entrust responsibility and authority to your team	3.54
	Adequately developing a matured leadership team	3.46
	A biblical understanding strengths and weaknesses in light of the spiritual gifts	3.31
	Sharing power	3.31
	Empowering a transition team while stepping back as they step up	3.31
	Genuine interest in collaboration	3.31
Supplemental	A desire to bring greater glory to God through the expansion of the existing ministry	3.23
	Common Convictions	3.15

Followership Characteristics'
Competency Ranking

Table 58. Followership characteristics by competencies

Followership		
Competencies	Character Traits	Mean Rating
Expert	Clarity of communication	3.85
	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	3.85
	Celebrate the success of those around you	3.77
	Integrity	3.69
	Servant leadership - others centered	3.62
	Self sacrifice for congregation and leadership team	3.62
	Humility	3.62
	Fidelity in first following Jesus	3.62
	A sense that mission comes before self	3.62
Core	Decrease so that transition team can increase	3.46
	Optimism	3.46
	Collaboration	3.31
	Personal Piety - not surface level issues of leadership or management; key is found in the heart	3.31
	Developing a reproducible ministry - giving abilities away as well as giving away control	3.31
Supplemental	Empower members to contribute to the succession process	3.23
	Submissive spirit	3.23
	Ability to mentor and not be "the teacher"	3.15
	Character development through study, reflection, and others	3.15

Disciple-Making Characteristics'
Competency Ranking

Table 59. Disciple-making characteristics by competencies

Disciple-making		
Competencies	Character Traits	Mean Rating
Expert	Consistent preaching and teaching	3.62
Core	Willingness to pass on what is known to others	3.54
	Intentional	3.54
	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	3.54
	Servant's heart - the ability to teach/lead without a condescending spirit	3.54
	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	3.46
	Prayerful	3.38
	Vision for biblical community and discipleship	3.31
Supplemental	Devotion to disciple making that replicates	3.23
	Desire to invest in the next generation for kingdom advancement	3.23
	Mission - centric	3.23
	Experience in discipling believers	3.15
	Experience in mentoring future leaders	3.15
	Relational	3.08
	Passion for the lost	3.08
	Clear thinking	3.08

The above proficiency model provides a powerful tool for the application of this research. The implementation of this competency model, as well as the successful transitioning pastor profile, will be further explored in the research applications section of this chapter.

Research Implications

The statistical data of this study provides several research implications. The following highlighted five research areas are believed to be of most significance:

1. The experts' strong consensus in rounds 2 and 3.

2. The experts' insight gleaned from justifying remaining outside of consensus.

3. Characteristics that the experts chose to leave outside of consensus.

4. Felt perception of the expert panel versus statistical reality provided by the expert panel.

5. Implications realized in reinforced and unexpected characteristics.

Experts' "Strong" Consensus

Thirteen of ninety-two characteristics, 14%, achieved consensus by experts selecting very important.[10] Because of the high number of characteristics (92) that reached consensus of 70% of experts affirming a characteristic as being important to the success of pastoral transition, it is helpful to identify characteristics that would have achieved consensus at 80%, 90%, and 100% agreement. Table 60 reflects characteristics that would have achieved consensus at 100%, 90%, and 80%.

**Characteristics Achieving 100, 90,
and 80 Percent Consensus**

Table 60. Characteristics achieving consensus at 100, 90, and 80 percent

General Characteristics		
#	100% Consensus	Percentage
1	Concern- care for the good of the church	100.0
2	Emotional maturity	100.0
3	Willingness to let go of authority	100.0
4	Commitment to leadership development	100.0
5	Trustworthiness	100.0
6	Self-awareness- knowing strengths and weaknesses	100.0
7	Trust in God's providence	100.0
8	A love that is greater for flock than self	100.0
	90% Consensus	
1	Humility	92.3
2	Secure	92.3
3	Honesty	92.3
4	Clarity	92.3
5	Spirit-led	92.3
6	Transparency	92.3
7	Leading by example	92.3
8	Patience to wait on the development of the successor	92.3
9	Generosity- willingness to share personal resources to ensure the success of the next pastor	92.3

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[10]The characteristics that would have attained consensus by very important ratings alone for General Characteristics were (1) concern—care for the good of the church, 92.3 percent; (2) emotional maturity, 84.6 percent; (3) willingness to let go of authority, 84.6 percent; and (4) humility, 76.9 percent. The characteristics that would have attained consensus by very important ratings alone for Kingdom-focused were (1) pursue God's glory versus self-glory, 92.3 percent; (2) humility, 84.6 percent; and (3) love for God before all else, 76.9 percent. The characteristics that would have attained consensus by very important ratings alone for team oriented were (1) willingness to fight natural ego, 76.9 percent; and (2) humility, 76.9 percent. The characteristics that would have attained consensus by very important ratings alone followership were (1) love for the church, 84.6 percent; (2) clarity of communication, 84.6 percent; (3) humility, 76.9 percent; and (4) celebrate the success of those around you, 76.9 percent. No disciple-making characteristics would have attained consensus solely on the selection of very important rating by the expert panel.

Table 60 continued

	80% Consensus	
1	Vision for the future- Desire for Ministry to thrive.	84.6
2	A dream for their own next chapter	84.6
3	Servanthood	84.6
4	Courage	84.6
5	Sense of responsibility- ownership for the good and the bad	84.6
6	Optimism	84.6
7	Being on the same page with your spouse in regard to transition	84.6
	Kingdom-focused characteristics	
	100% Consensus	
1	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda	100.0
2	Confront tendencies to build own kingdom	100.0
3	Point people to Jesus	100.0
4	Spiritual Maturity	100.0
	90% Consensus	
1	Prayerful	92.3
2	Leadership development	92.3
3	Desire for others to exceed you. A desire for the next generation to do more than the current generation	92.3
4	Humility	92.3
5	Love of God before all else – in every area of life	92.3
6	Understanding of the church as kingdom agent/instrument rather than existing for itself	92.3
7	Depersonalizing the situation - "it's not about me"	92.3
	80% Consensus	
1	Servant	84.6
2	Realization of mortality	84.6
3	Awareness - learning from others failure	84.6
	Team Oriented Character Traits	
	100% Consensus	
1	Regular, honest communication	100.0
2	Mutual respect	100.0
3	Recognize that others gifts are as important as that of the senior leader	100.0
4	Willingness to fight natural ego	100.0
	90% Consensus	
1	Humility	92.3
2	A willingness to invest time in their leaders	92.3
3	Unselfishness - to put other's needs and interests above their own	92.3
	80% Consensus	
1	A biblical understanding strengths and weaknesses in light of the spiritual gifts	84.6
2	Sharing power	84.6
3	Adequately developing a matured leadership team	84.6
4	Empowering a transition team while stepping back as they step up	84.6
5	Common Convictions	84.6
6	Genuine interest in collaboration	84.6
7	Entrust responsibility and authority to your team	84.6
8	A desire to bring greater glory to God through the expansion of the existing ministry	84.6

Table 60 continued

	Followership - Character Traits	
	100% Consensus	
1	Servant leadership - others centered	100.0
2	Clarity of communication	100.0
3	Self sacrifice for congregation and leadership team	100.0
4	Decrease so that transition team can increase	100.0
5	Empower members to contribute to the succession process	100.0
6	Celebrate the success of those around you	100.0
7	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective	100.0
	90% Consensus	
1	A sense that mission comes before self	92.3
2	Integrity	92.3
3	Fidelity in first following Jesus	92.3
4	Personal Piety - not surface level issues of leadership or management; key is found in the heart	92.3
5	Optimism	92.3
	80% Consensus	
1	Humility	84.6
2	Character development through study, reflection, and others	84.6
3	Collaboration	84.6
4	Developing a reproducible ministry - giving abilities away as well as giving away control	84.6
5	Ability to mentor and not be "the teacher"	84.6
	Disciple-making Character Traits	
	100% Consensus	
1	Willingness to pass on what is known to others	100.0
2	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	100.0
3	Servant's heart - the ability to teach/lead without a condescending spirit	100.0
4	Mission - centric	100.0
	90% Consensus	
1	Consistent preaching and teaching	92.3
2	Intentional	92.3
3	Desire to invest in the next generation for kingdom advancement	92.3
	80% Consensus	
1	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish	84.6
2	Vision for biblical community and discipleship	84.6
3	Experience in mentoring future leaders	84.6
4	Prayerful	84.6
5	Clear thinking	84.6

Table 60 show that 82 characteristics achieved consensus at 80 percent

consensus, 54 characteristics achieved consensus at 90 percent, and 27 characteristics

achieved consensus at 100 percent. The ten characteristics that did not achieve consensus at 80 percent are displayed in Table 61.

Characteristics Not Achieving
80 Percent Consensus

Table 61. Characteristics not achieving consensus at 80%

#	Character Traits	Percentage
	General Characteristics	
1	Flexibility	77.0
2	Holiness	77.0
	Kingdom-focused Characters	
1	Personal piety.	77.0
2	Retained passion for ministry versus burn-out.	77.0
	Team Oriented Character Traits	
1	Able to train others.	77.0
	Followership Character Traits	
1	Submissive spirit.	77.0
	Disciple-making Character Traits	
1	Experience in discipling believers	77.0
2	Relational	77.0
3	Passion for the lost	77.0
4	Devotion to disciple making that replicates	77.0

When characteristics that achieved complete consensus (100 percent) were compared to the competency values established in round 3, 17 complete consensus characteristics were included in the expert competencies, five complete consensus characteristics were included in core competencies, and two complete consensus characteristics were included in supplemental competencies. The category which had greatest inconsistency between 100 percent consensus and round 3 competency values was the area of disciple-making. The disciple-making characteristics of willingness to pass on what is known to others, unselfish spirit, and servant's heart, which all rated as core competencies, achieved 100 percent consensus and the one expert competency, consistent preaching and teaching, did not achieve 100 percent consensus. The disciple-making characteristic of being mission centric also achieved 100 percent consensus while only achieving a supplemental competency rating.

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These statistical inconsistencies point to the need for further study in regards to the area of disciple-making and transitional pastoral leadership. Three potential rationales for the apparent inconsistency are that (1) disciple-making needs to be more clearly defined, (2) disciple-making is a blind-spot in the transitional leadership process, possibly reinforced by an individualistic culture whose understandings of disciple-making have shifted from a more holistic biblical perspective, (3) a combination of reasons one and two, or (4) an unidentified factor.[11]

Experts' Insight

An area in which the experts' responses were helpful was in shedding light on the importance of clarifying the definition of characteristics for future research. Different perspectives bring unique nuances to the research. For example, one expert commented in relation to the characteristics of servanthood, "For some servanthood is described as wanting to serve in whatever way possible . . . but another could look at a very strong leader that would claim they serve best by being the leader."

Another area where experts' responses were insightful was in showing how context impacts views on transitional leadership. One expert wrote in reference to the characteristics Spirit-led, "While in charismatic traditions this is seen as very positive trait, in some other traditions, that is not a prerequisite for successful transition." Another example can be seen in the definition of the characteristic of holiness. An expert wrote, "While preferred of course, the Baptist definition of holiness often differs greatly from others' definition."

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[11]The definition of disciple-making was clearly defined by the researcher and communicated to the expert panel in each round of survey. The following definition was communicated, "The term *disciple-making* is being viewed primarily in the biblical sense of Matt. 28:19-20 and 2 Tim. 2:2, where there is an intentional spiritual investment in order that the individual invested in may replicate and invest in another spiritually. In a broader secondary context, disciple-making would also apply to a transitioning pastor investing in an individual for leadership development through the depositing of their experience and wisdom into an individual for an area of ministry service."

One more area where experts' responses were helpful was in acknowledging the temptation of assigning preferable but not necessary characteristics to the successful transitional pastor. One expert wrote concerning the disciple-making characteristics: relational, prayerful, passion for the lost, and devotion to disciple-making that replicates, "Again, all these qualities are good, but I would not consider them essential to this issue of succession. We are clouding the issue of succession with generalized qualities."

What the Experts Left Out

It is advantageous to identify what did not achieve the consensus of the expert panel. It has already been documented that of the 27 characteristics from the literature review, the expert panel did not mention five characteristics: (1) wise, (2) hard working, (3) intelligent, (4) tenacious, and (5) kind. Two characteristics, a good sense of humor and compassion, were given by the expert panel, but both failed to reach consensus.

Tables 62-66 display characteristics offered by the expert panel that did not achieve 70 percent consensus.

Characteristics That Did Not
Achieve Consensus

Table 62. General characteristics that did not gain consensus

	Round 1 Responses of the Expert Panel - General Characteristics: Question 1 - What specific character traits or qualities do successful transitioning pastors demonstrate?			
#	General Consensus Characteristics	Extremely Important or Important	Somewhat Important or Not at All Important	Consensus
1	Compassion	69.2	30.8	No
2	Capacity for coaching others	69.2	30.8	No
3	Problem Solver- able to reconcile and listen	69.2	30.8	No
4	Teachability	61.5	38.5	No
5	Sense of humor	61.5	38.5	No
6	Willingness to announce a definite retirement date one year in advance	53.8	46.2	No
7	Objectivity	53.8	46.2	No
8	Vulnerability	53.8	46.2	No
9	Capacity and desire to develop as a leader	53.8	46.2	No
10	Perceptive about qualities needed in successor	53.8	46.2	No
11	Systematic- strategically able to plan	53.8	46.2	No
12	Analytical	38.4	61.6	No

Table 63. Kingdom-focused characteristics that did not gain consensus

#	Kingdom-focused Consensus Characteristics	Extremely Important or Important	Somewhat Important or Not at All Important	Consensus
- Round 1 Responses of the Expert Panel - Kingdom-focused: Question 3 - What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?				
1	Ability to frame a succession process in Biblical terms - seeing the Biblical example of transitions: Moses/Joshua, Elijah/Elisha, Paul/Timothy	69.2	30.8	No
2	Vision for a new role for themselves that results in fruit	69.2	30.8	No
3	View themselves as interim pastor	53.8	46.2	No

Table 64. Team oriented characteristics that did not gain consensus

#	Team Oriented Consensus Characteristics	Extremely Important or Important	Somewhat Important or Not at All Important	Consensus
Round 1 Responses of the Expert Panel - Team Oriented: Question 4 - What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others.				
1	Conviction of the priesthood of all believers	69.2	30.8	No
2	Allowing team members to be independent	69.2	30.8	No
3	Service oriented	69.2	30.8	No
4	Sense of humor	61.5	38.5	No
5	A generational view of ministry	53.8	46.2	No

Table 65. Followership characteristics that did not gain consensus

#	Followership Consensus Characteristics	Extremely Important or Important	Somewhat Important or Not at All Important	Consensus
Round 1 Responses of the Expert Panel - Followership: Question 5 - What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?				
All of the characteristics given for followership achieved consensus.				

Table 66. Disciple-making characteristics that did not gain consensus

#	Disciple-making Consensus Characteristics	Extremely Important or Important	Somewhat Important or Not at All Important	Consensus
Round 1 Responses of the Expert Panel - Disciple-making: Question 6 - What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?				
1	The ability to identify and help develop spiritual gifts	69.2	30.8	No
2	Urgency	69.2	30.8	No
3	In the context of a succession process, a transitional pastor will have a limited ability to make disciples and will need an external resource to develop disciples for the succession process	38.5	61.5	No

In contrast to the emphasis in the literature outlining practical strategies for facilitating a successful transition, the following characteristics did not achieve consensus: (1) the practical characteristics of announcing a retirement date one year in advance, (2) view themselves as a interim pastor, (3) a biblical view of transition, (4) a vision for a new role for themselves that bears fruit, and (5) perceptive in regards to the characteristics of a successor. The characteristics for followership, given by the experts, all achieved consensus. This phenomenon surrounding followership characteristics appears to statistically underscore the importance of the role of followership in the character profile of the successful transitioning pastor and is reinforced by the high level of expert competencies in the area of followership.[12]

Felt Perception Versus Statistic Data

In round 2, the experts were asked to identify what they believed to be the top 3 characteristics selected from the 38 general characteristics given by the expert panel. The top 6 identified traits are seen in table 67.

Table 67. Round 2 top 6 characteristics

	Experts' Response of Top 3 Succession Characteristics - Question 2 - Please identify what you consider to be the three most important character traits or qualities from the list of 38 character traits and qualities for a successful transitioning.		
	Character Trait	Percentage	Count
1	Humility	15.38%	6
2	Willingness to let go of authority	15.38%	6
3	Concern- care for the good of the church	12.82%	5
4	Vision for the future- Desire for Ministry to thrive	7.69%	3
5	Willingness to announce a definite retirement date one year in advance	7.69%	3
6	Spirit-led	7.69%	3

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[12]Fifty percent of followership characteristics scored within the expert competency range with a mean greater or equal to 3.60.

The top three characteristics chosen by the expert panel, (1) humility, (2) willingness to let go of authority, and (3) concern (care for the good of the church) all scored as expert competencies with mean scores of 3.69, 3.92, and 3.92. The characteristic of vision for the future rated as a core competency, while willingness to announce a definite retirement date one year in advance and spirit-led failed to reach consensus. As identified in the previous section, this research found that practical strategies for pastoral transition as far as they relate to characteristics of the successful transitional pastor scored statistically low and in some cases did not achieve consensus. As mentioned earlier, the term Spirit-led which was one of the experts' top six succession characteristics is ambiguous and therefore subjective in its nature depending on an expert's background.

In round 3, the experts were asked to rank the top 6 qualities in order of their priority. Humility and concern (care for the good of the church) scored highest followed by a willingness to let go of authority and vision for the future. Spirit-led scored 5th highest and willingness to announce a definite retirement date one year in advance was last with a mean score almost half of the highest ranked characteristics of humility and concern (care of the good of the church). The third round ranking more closely aligned with final consensus and the competency rankings.

Reinforced Characteristics and Unexpected Characteristics

There were several characteristics whose importance was reinforced by their repetition across the five themes of successful transitioning characteristics. In this regard, the characteristic of humility appeared in four of the five categories. In every occurrence but one, humility achieved an expert competency status. The characteristic of servant occurred three times. This characteristic achieved expert competency for general characteristics and core competency level in kingdom-focus and followership. The evangelistic characteristics of passion for the lost, mission-centric, and point people to

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Jesus were collectively found in two categories. Other characteristics that were repeated in at least two categories were prayer, piety, and optimism.

Several potential unexpected characteristics that achieved consensus, and were included in the supplemental competencies, are being on the same page with your spouse, realization of mortality, retained passion for the ministry versus burn-out. While supplemental competencies, these characteristics all point to issues that can understandably adversely impact a successful transition.

Refocusing for Successful Transitions

The research findings of this study call for a refocusing of the conversation surrounding successful transition. First, from the experts' strong consensus, more weight should be given to the 17 character traits that achieved complete consensus at 100 percent in the second round and were again reaffirmed in the third round as gaining expert proficiency level (table 62).

Second, greater attention should be given to the 18 of the 27 100 percent consensus characteristics which were not included in the list of 27 characteristics identified in the literature review.[13] Table 68 highlights in bold the intersection between 100 percent consensus and an expert proficiency characteristic. Comparable characteristics that were present in the literature review are included in brackets.

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[13]Fourteen of the 17 expert proficiency traits that aligned with the 100 percent consensus traits were not included in the list of 27 characteristics identified in the literature.

Table 68. Expert proficiencies that achieved 100 percent consensus

#	General Characteristics	Percentage
	Character Traits Achieving Consensus at 100%	
1	**Concern- care for the good of the church**	**100.0**
2	**Emotional maturity**	**100.0**
3	**Willingness to let go of authority**	**100.0**
4	Commitment to leadership development ~ [Learner]	100.0
5	**Trustworthiness ~ [Trustworthy]**	**100.0**
6	Self-awareness- knowing strengths and weaknesses ~ [Personally aware]	100.0
7	**Trust in God's providence**	**100.0**
8	**A love that is greater for flock than self** ~ [Compassion]	**100.0**
	Kingdom-focused Characters ~ [Kingdom-focused]	
1	**Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda**	**100.0**
2	**Confront tendencies to build own kingdom**	**100.0**
3	Point people to Jesus	100.0
4	**Spiritual Maturity**	**100.0**
	Team Oriented Character Traits ~ [Team-oriented]	
1	**Regular, honest communication**	**100.0**
2	**Mutual respect**	**100.0**
3	Recognize that others gifts are as important as that of the senior leader	100.0
4	**Willingness to fight natural ego**	**100.0**
	Followership Character Traits	
1	**Servant leadership - others centered**	**100.0**
2	**Self sacrifice for congregation and leadership team ~ [Selfless]**	**100.0**
3	Decrease so that transition team can increase	100.0
4	Empower members to contribute to the succession process	100.0
5	**Celebrate the success of those around you**	**100.0**
6	**Clarity of communication**	**100.0**
7	**Love for the church - desiring the ultimate welfare of his flock, an eternal perspective**	**100.0**
	Disciple-making Character Traits ~ [Disciple-maker]	
1	Willingness to pass on what is known to others ~ [Mentor]	100.0
2	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth	100.0
3	Servant's heart - the ability to teach/lead without a condescending spirit	100.0
4	Mission - centric	100.0

In light of the limited alignment between the character traits in the literature with the findings of this study, there arises the need to refocus conversation surrounding succession. Characteristics that achieved 100 percent and 90 percent consensus should be given more attention than those that scored at lesser consensus levels. Characteristics

that achieved expert proficiency should be given greater weight than characteristics that achieved core and supplemental proficiency. Also flowing from the data in this study, greater focus should be given to the area of followership due to a strong, positive statistical response by the experts toward followership characteristics. The area of disciple-making should also be given attention to either affirm its lack of relevance to the succession process or to identify a potential deficiency in the area of disciple-making in light of transitional leadership.

Expert feedback has called the pastoral transition conversation to clearly define definitions of the characteristics being discussed. The impact of the context of a particular transition should also be taken into consideration. Also, less is more and where possible, good characteristics must be weeded out to focus on best characteristics.

When looking at the characteristics of the successful transitioning pastor, strategies can cloud the conversation and distract from focusing on the necessary characteristics that are important to a successful transition. While strategies are necessary and the final application of transitional leadership, this research found that the experts left out many strategic characteristics that were not considered crucial to the characteristics of the successful transitioning pastor. In contrast, the high numerical response in the area of followership points to this arena as being crucial to the successful transitional pastor.[14]

Three characteristics that merit being at the forefront of the succession conversation are: (1) humility, (2) letting go of authority, and (3) concern (care for the church). These three characteristics were identified by the experts as both a felt and then statistically significant characteristics and therefore should be given the appropriate gravitas. The characteristics of humility, servant, and evangelistic were characteristics that gained merit due to repetition across different categories of characteristics.

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[14]Followership appears to be in paradox to transitional leadership. Yet, in *Follower First*, Rusty Ricketson has argued contrary looking at the ideal of followership while holding Jesus up as the ultimate transitional leader. Rusty Ricketson, *Follower First* (Cumming, GA: Heartworks, 2009).

In summation, this research has called for a refocusing of the conversation surrounding pastoral succession, specifically in the area of key characteristics of the successful transitioning pastor. This re-focus should be informed by the key findings of this research which has highlighted characteristics achieving expert competencies versus core and supplemental competencies, characteristics of high consensus versus lower consensus, characteristics achieving both felt and statistical significance, and repeating characteristics within the data. Research moving forward should be guided by a greater defining of terms, resolve to not be distracted by transitional strategies which are helpful but can distract from characteristics of proven statistical significance, a willingness to explore implications of different contexts, and curiosity to investigate the areas of followership and disciple-making and their impact on successful pastoral transition.[15]

Research Applications

In light of the interpretation of the data, three applications should be pursued in order to lend greater clarity and refocus future conversations and research surrounding pastoral transition. These applications can best be understood from a comprehensive, a categorical, and a competency perspective.

A Comprehensive Interpretation
and Applications

From a high-level view, one of the most noticeable findings is that the category of followership experienced the most statistically positive response from the expert panel while the category of disciple-making experienced a low statistical response. For example, when contrasted, followership had seven character traits that received 100 percent consensus compared to disciple-making which had four character traits that received 100

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[15]It is worth noting that the 2018 edition (which had not been released at the time of this writing) of Peter Northouse's *Leadership and Theory Practice*, 8th ed., includes a chapter on followership.

percent consensus.[16] While the categories of kingdom-minded and team oriented also had four character traits each that received 100 percent consensus, disciple-making had only 6.25 percent characteristics that achieved expert status and followership had 50.00 percent achieving expert status.[17] In addition, 50 percent of the disciple-making characteristics that achieved consensus were ranked as supplemental competencies well below the percentages of the other categories.[18]

As stated previously, the positive statistical response to followership calls for more focus to be placed on followership and how it influences the successful transitional leader. Yet, the unexpectedly low statistical response to disciple-making characteristics within the transitional leader's repertoire calls into question a potential blind-spot of the transitional leader and the current leadership practices within pastoral ministry. While the disciple-making characteristics of (1) passing on knowledge, (2) giving time to invest in others, (3) teaching and leading without a condescending spirit, and (4) being mission-centric all achieved 100 percent consensus, only one characteristic achieved an expert competency level for the category of disciple-making, specifically consistent preaching and teaching. It is telling that Jesus' commanded mission for his followers to make disciples seems to have been reduced to consistent preaching and teaching for the senior

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[16]The 7 character traits of followership that received 100 percent consensus were (1) servant leadership, (2) self sacrifice for congregation and leadership team, (3) decrease so that transition team can increase, (4) empower members to contribute to the succession process, (5) celebrate the success of those around you, (6) clarity of communication, and (7) love for the church. The 4 character traits of disciple-making that received 100 percent consensus were (1) willingness to pass on what is known to others, (2) unselfish spirit, (3) servant's heart, and (4) mission-centric.

[17]In comparison, there were 31 percent expert competencies for general characteristics, 25 percent expert competencies for kingdom-focused characteristics, and 37.5 percent expert competencies for team oriented characteristics.

[18]In comparison, there were 31 percent supplemental competencies for general characteristics, 25 percent supplemental competencies for kingdom-focused characteristics, 8.8 percent supplemental competencies for team oriented characteristics, and 22.2 percent of supplemental competencies for followership characteristics.

pastor. While excellent preaching and teaching are to be valued, a spiritual gift, and a

key responsibility of a lead pastor, this is not the sine qua non of disciple-making.[19] This

research speaks to the need of a greater understanding and focus on a transitioning

pastors' role in disciple-making beyond consistent preaching and teaching.[20]

In application, transitional pastors need to be intentionally investing

relationally in a few with a view to biblical disciple-making and replication that extends

beyond consistent preaching and teaching, leading a staff, and casting vision. It is

necessary to clarify that the transitioning pastor may not necessarily be minting his

successor, but the helpful and commanded characteristics required of a disciple-maker

should be present and brought to bear within a transition.[21] Those who limit their

ministry activities to their spiritual giftedness and positional functionality while ignoring

investing in others through disciple-making which empowers others to engage in

kingdom work run the risk of creating a false dependency in those who follow them,

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[19]It is interesting to note that in many Western and Eastern churches the spiritual giftedness of teaching and preaching results in great authority being vested to one individual. While Scripture calls for spiritual gifts to be used for the building up of the body of Christ (Eph 4:10), a tangential result (or potential abuse) of the gifts of preaching and teaching is the resulting building up of an individual. If not guarded against, the giftedness of one individual can create a dependency within the body on that individual. If given too great a priority, the gift of preaching and teaching can lead to a deficit or lack of attention given to disciple-making. It is assumed in some contexts that preaching and teaching, as well as vision casting and leadership, are the only responsibilities of the pastor. Jesus used consistent preaching and teaching as one of many tools to make disciples; but ultimately, he invested time in a select few for the purpose of replication.

[20]From a memory, retention, and learning perspective preaching falls into the least effective method for transmission. Dale's cone of learning is helpful in substantiating this claim. Dale's cone of learning is a diagram showing the average percentage of retention of material after 24 hours for each of the instructional methods: lecture (5%), reading (10%), audiovisual (20%), demonstration (30%), discussion group (50%), practice by doing (75%), and teaching others/immediate use of learning (90%). David A. Sousa, *How the Brain Learns*, 3rd ed. (Thousand Oaks, CA: Corwin, 2006), 95. "Dale's cone is based on the simple formula that persons remember only 10 percent of what they hear, 50 percent of what they see and hear, and 90 percent of what they do." Adapted from Edgar Dale, *Audio-Visual Methods in Teaching*, rev. ed. (New York: Holt, Rinehart & Winston, 1954), chap. 4.

[21]It is generally accepted that character is better caught than taught, and for this reason, the pulpit alone is a poor medium to make-disciples, e.g., George Whitfield versus John Wesley, referenced in chap. 2n130.

placing themselves in a position that leads to self-glory, and building their own kingdom.[22] In contrast to these undesirable qualities, this research has identified the high statistical priority of letting go of authority, seeking God's glory, fighting ego, not building a personal kingdom, and embracing humility.[23]

A Categorical Interpretation and Application

Looking at the data from the five themes of general, kingdom-minded, team oriented, followership, and disciple-making characteristics, three transitional characteristics in the general characteristics category were statistically rated as a top priority. These were the willingness to let go of authority with a mean of 3.92, concern (care for the good of the church) with a mean of 3.92, and emotional maturity with a mean of 3.85.

General characteristics. The top three characteristics, letting go of authority, care for the good of the church, and emotional maturity, were statistically affirmed by the expert panel's choice of the top three transitional characteristics identified in question 2 of round 3.[24] These three leading characteristics are also consistent with high scoring characteristics found in the categories of kingdom-minded, team oriented, and followership characteristics.[25] As already noted, disciple-making characteristics failed to garner high mean scores apart from consistent preaching and teaching.

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[22]Jesus, the greatest preacher and teacher, empowered his disciples, created disciples who could function independent of His presence, was humble unto death, and obeyed His Father's will in building His Father's kingdom.

[23]These character qualities were all considered expert competencies with mean averages of 3.92, 3.92, 3.77, 3.62, 3.69, respectively.

[24]This finding aligned closely with the results of question 2 round 3, which asked the experts to rank their top 3 characteristics for successful transitional pastors.

[25]Top characteristics were: kingdom-minded—pursue God's glory versus self glory (3.92), spiritual maturity (3.69), love of God before all else (3.69); team oriented—willingness to fight natural ego

Kingdom-minded characteristics. Application of the top kingdom-minded characteristics set forth the imperative for a clear focus on the glory of God by the transitional leader. This theological emphasis encompasses a healthy concern or care for the church, creates a humility that leads to the willingness to let go of authority, and produces emotional maturity. God's glory, not the leader's legacy, should be upheld as the motivation for a transitioning pastor, church body, and succeeding pastor to work together toward a successful transition. It is interesting to observe that the expert competencies of kingdom-mindedness deal with God's glory while the core competencies consist of Christ-like character traits.[26] This research links Christ-likeness and God's glory in the context of kingdom-mindedness.

Team-oriented characteristics. There are several interesting applications which can be drawn from team-oriented characteristics. First, the highest characteristics trait is a defensive trait, willingness to fight natural ego. The priority given to this trait reflects a healthy biblical understanding of human depravity and that with power come the potential for pride and corruption.[27] Reinforcing the characteristic of the willingness to fight natural ego is the second highest statistically ranked characteristic, humility. While there are many definitions and the application of team is varied, this research encourages the transitional pastor to give careful focus to their disposition as a leader. The nature of the top characteristics for team oriented characteristics points to a natural correlation between the disposition of a leader and the ideal of followership which will be

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(3.77), humility (3.69); followership—love for the church (3.85), integrity (3.69), and humility (3.62).

[26]Kingdom-minded expert competencies were (1) purse God's glory verses self-glory, (2) love of God before all else, (3) spiritual maturity, and (4) confront tendencies to build own kingdom. Kingdom-minded core competencies were (1) humility, (2) point people to Jesus, (3) desire for others to exceed you, (4) prayerful, (5) servant, (6) depersonalizing the situation—"it's not about me," (7) understanding the church as kingdom agent/instrument rather than existing for itself, and (8) personal piety.

[27]For an excellent treatment of this subject, see Gary L. McIntosh and Samuel D. Rima, Sr., *Overcoming the Dark Side of Leadership* (Grand Rapids: Baker, 1997).

examined next. One last statistical note regarding team oriented characteristics was the low score of the characteristics of being able to train others which, while gaining consensus, had the lowest mean for team oriented character traits at 2.85. While disciple-making as a category had low statistical response, it is surprising that the ability to train others in a team setting did not score higher. Again, here may be the reality of the myopic view of the pastor being relegated only to preaching and teaching, leading, and vision casting.

Followership characteristics. The category of followership provided bifurcated statistical results and therefore its application is two-fold. First, as already mentioned, characteristics such as humility, integrity, and love for the church scored statistically high thereby tightly aligning followership with the top three transitional characteristics. The high statistical response to followership traits, 50% were considered expert competencies for transitions, leads to the application of transitional pastors great need to follow the lead of those who serve with them, those that they serve, and ultimately following the Lord.

Second, the expert panel responded to this category from the perspective of a leader toward a follower. While this trajectory did not fall within the researcher's intent or definition of followership, the expert panel's responses warrant attention. In a tie for the top characteristic for followership was (1) love for the church (3.85) and (2) clarity of communication (3.85). When compared with the next two highest characteristics, the dual nature of the experts' response to followership becomes apparent. The third and fourth highest followership characteristic were (3) celebrate the success of those around you (3.77) and (4) integrity (3.69). Two of these characteristics, love for the church and integrity, focus on inward characteristics of the transitional pastor. The other two characteristics, clarity of communication and celebrate the success of those around you, focus outward toward perceived followers of the transitional pastor.

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The third application arising out of the statistical response to followership is that followership and leadership are two sides of one coin. While followership is necessary to be a great leader, leadership where appropriate should not be diminished as it is necessary for the well-being of followers.

A Competency Model Interpretation
and Application

The current thought on transitional leadership places emphasis on a transitional pastor leading through proclaiming the realities of succession and then implementing succession plans. This research has focused on becoming the right transitional leader and has built a unique character profile so that necessary characteristics can be better linked to right practices.

In addition to the creation of a successful transitional pastor profile, a competency model has been developed. While the profile of the successful transitioning pastor provides 92 characteristics, the competency model is a powerful tool that builds on these 92 characteristics to provide multiple applications. The nature of this research leads to very tangible applications for pastors, churches, and the academic institutions that are training a new generation of leaders. Competency models are important as they have become integral in many human resources systems and are informative in the areas of selection, training, evaluating performance, and succession planning.[28]

The following research applications utilizing the competency model leads to three applications of self-assessment, leadership development, and academic training. This competency model will aid the church by (1) providing clarity of focus for leaders who are facing succession, (2) developing mechanisms for denominational leadership and

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[28]Anntionette D. Lucia and Richard Lepsinger, *The Art and Science of Competency Models: Pinpointing Critical Success Factors in Organizations* (San Francisco: Pfeiffer, 1999), 21.

those responsible for overseeing the church leadership, and (3) training future leaders to develop characteristics that lead to successful transitions of church leaders.

Self-assessment. In a world that calls for leadership to be nimble and adaptive, competency models are a valuable application for an individual looking to grow in their leadership ability and to apply best practices to their current situation.[29] A new generation and the rapidly changing playing field of culture call the church and their leaders to apply new models of assessment to their current thinking and practice. Leaders who are facing succession and looking to grow in their personal development can apply the successful transitioning pastor competency model to self-assess areas of strength and weakness.

A logical extension of this research would be the development of a book for pastors facing transition which offers a summary of the current literature, helpful insight found in this research, and practical applications which can aid a pastor facing transition. Even though knowledge and skill competencies are easier to develop, character competencies can be trained to a lesser extent.[30] The practical applications component of this book would provide specific practices that would aid the transitional leader in the growth of their character in relationship to the desired characteristics that lead to successful transition. While it is easier to select for character competencies at the point of hire, most would agree that pastors are hired for the competencies that would benefit the present realities of the church and not a transitional chapter in a later season of life.[31] The willingness to self-assess at key junctions in ministry life is a desirable quality in a

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[29]Michael A. Campion et al., "Doing Competencies Well: Best Practices in Competency Modeling," *Personnel Psychology* 64 (2011): 238.

[30]Ibid., 286.

[31]Lyle M. Spencer, Jr., and Signe M. Spencer, *Competence at Work* (New York: Wiley, 1993), 11-12.

leader and self-assessment serves both the leader, those that depend on his guidance, and ultimately the transitioning pastor's successor.

Church leadership. While transitional pastors are the intended beneficiaries of the successful transitioning competencies, there are many individuals who support and wield positive influence over these transitional leaders. Denominational leaders, board members, trusted confidants, and lay leaders who have been commissioned to support, guide, and in some circumstances facilitate pastoral successions, would benefit from the insight provided by this competency model.[32] For those who are seeking to help a transitional leader or oversee a transition process, the competency model would be a powerful tool at their disposal. Even though motive and trait competencies are difficult to train, the biblical community should look to promote and reinforce godly characteristics in the men who lead them.[33]

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[32]A great example of a trusted advisor being tasked to walk alongside a well known pastor can be seen in the initial conversations surround the transition of Bill Hybels. Alex Murashko, "Bill Hybels Shares Succession Plans at Leadership Summit," *The Christian Post*, August 10, 2012, accessed January 8, 2017, https://www.christianpost.com/news/bill-hybels-shares-succession-plans-at-leadership-summit-79787/, writes,

> "The elders at Willow Creek are quite aware that I turned 60 this last year. . . . They know my family history of heart disease. They know that I travel into high risk areas so they brought the subject matter of succession several times in recent years," Hybels explained to several thousand in attendance at his church in South Barrington, Ill., and a huge online audience watching the Willow Creek Association Global Leadership Summit. "They finally asked me if I would be willing to enter more formal conversations about my potential transition out of this church. They assigned one elder that I know well and that I trust deeply and I said sure, why not." . . . Hybels, who founded the association and created the global summit, introduced the topic of his succession about half way through his talk on leadership to help other pastors and churches understand the process, he said. The elders at Willow Creek Church chose someone who is personally close to Hybels to begin having the important conversations as to how the transition would occur. 'Our early conversations were a little awkward. We both knew what we were supposed to be talking about, but my leaving Willow is not the easiest subject matter,' Hybels said. 'But Mike (did not give full name) was extremely sensitive to my feelings to over the course of a full year as we talked about the future.'"

[33]Spencer and Spencer, *Competence at Work*, 11. Gregg R. Allison, *Sojourners and Strangers: The Doctrine of the Church* (Wheaton, IL: Crossway, 2012), 218.

Competency models have been used to (1) provide an assessment of an individual's readiness, (2) focus training and development in areas of needed growth, and (3) help organizations understand and leverage strengths of their leaders.[34] This tool, along with the successful transitioning pastor profile (STPP), can be greater developed through the creation of surveys and assessment profiles that would help those in transitional leadership positions assess potential areas of growth for a transitional leader which could be either compensated for or allow the transitioning pastor to be coached or mentored to grow in specific characteristics deemed crucial.[35] Spencer and Spencer point out that if a competency (1) can distinguish a superior performer, (2) cannot be hired for, and (3) can be trained then this competency should be targeted for advance training.[36] Applications of surveys and assessments relating to transitional leadership would be malleable to contextual situations and its application could be in degree depending on the circumstances.

Further development of resources would aid leaders and therefore their churches to support their pastors in the midst of transition. Expansion of these applications could lead to the development of consulting applications designed to assess, analyze, and provide applications for specific transitional needs.[37]

Academic training. The third area of research application for the competency model would be in the academic training of future pastors. These leaders will become the

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[34]Lucia and Lepsinger, *The Art and Science of the Competency Models*, 23.

[35]Questionnaires such as those found at the end of each chapter in Northouse's *Leadership Theory and Practice* could be built out to identify characteristics within each of thematic groupings (general, kingdom-minded, team oriented, followership, and disciple-making) to help leaders and those around them quickly identify potential areas of growth. Once these growth potentials have been identified, leadership surrounding the transitional leader could help to formulate best practices specific to the context at hand to afford opportunities for the transitional leader to experience growth. Peter Northouse, *Leadership Theory and Practice*, 7th ed. (Los Angeles: Sage, 2016), 189, 250, 287.

[36]Spencer and Spencer, *Competence at Work*, 106.

[37]An example of a similar consulting model would be the Transformational Church Assessment Tool (TCAT), http://tcat.lifeway.com.

next generation of succeeding and then transitioning pastors. The STTP, competency

model, and implications of further research surrounding transitional leadership should be

integrated into the academic setting through intentional curriculum design, the use of

affective goals, and intentional partnership to provide resources to help church bodies and

their pastors be better positioned to understand and implement successful transitions.

While the church will be the ultimate proving ground of pastoral leadership skills,

seminaries are viewed as the training ground for these future leaders. Ted Ward writes

concerning this perspective,

> They view the educational institution as a place where people go in order to get this
> or that competency, and when they graduate they are assumed to be eligible for
> church ministry. I find that, in most instances, churches presume that the pastor or
> other staff member will be "finished" when they get him or her, and there's nothing
> else to do. You just "get" the "finished product," put it in place, and it works.
> Theological schools are the institutions the church assigns to produce these
> competencies, and if the graduates are deficient in any way, then it's the
> institution's fault.[38]

Right or wrong, the perception that the seminary world is responsible for the

development of competencies in their graduates calls for greater intentionality. The need

for character and competency development is greater than ever.[39] In a culture that is

obsessed with individual personality versus personal character, seminaries must swim

against the prevailing culture to help shape, guide, and foster desired characteristics and

competencies within their graduates.[40] These characteristics and competencies will serve

both the institutions' graduates and the churches which have entrusted these institutions

to train their pastors.

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[38]Rick Kalal, "We've Got Trouble," *Christian Education Journal* 3, no. 1 (March 1999): 55.

[39]E.g. Enron et al.

[40]Susan Cain, *Quiet: The Power of Introverts in a World that Can't Stop Talking* (New York: Broadway Books, 2013), loc. 499, Kindle.

Research Limitations

The following limitations were included in this study:

1. As this is the first systematic study of this nature, the collected data would benefit by further validation of future research through repeated studies and other expert populations.

2. This research focused solely on the characteristics of the successful transitioning pastor. The exiting pastor is just one part of the multivariate equation of transition. The entering pastor as well as the church's internal culture are factors that are equally important for a successful transition to occur.[41] Further research to examine each of these factors that can lead to a successful transition within different streams of the church would be beneficial to the subject of pastoral transition.

3. For the purposes of this research, the sample only included those who had written on transition, had transitioned successfully, or are a recognized expert in the area of transition. While the views of these experts were preferred for this research, others perspectives may be similar or different from these experts based on their experience or unique role in the transitional process.[42]

4. The expert panel, while spanning several denominations and reflective of both genders, did not consist of Hispanic, Asian American, or African American experts. While individuals from two of these three streams were approached to be part of the expert panel, time constraints of the individuals approached did not permit their participation in this study. While there exists a level of application of this research across the evangelical world, some competencies would be rated differently according to cultural preferences and background.

Further Research

Areas of further research include the following:

1. Reinforce the strength of this research model by replicating this study with additional experts while using the same methodology.

2. Use the same research methodology to study pastoral transitions in other specific contexts such as pastoral transitions outside of the context of the United States, familial successions, pastors in a specific non-Anglo context, succession in multi-sight churches, and succession in a rural context.

3. Apply the current findings of this research to case studies of well-known transitions that were unsuccessful thereby strengthening the validity of this study.

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[41]There are different cultures of churches and each will approach succession differently: e.g., Evangelical, charismatic, churches of a predominately single ethnicity or race, main-line, or non-denomination churches all have different cultures and therefore all experience different patterns of succession.

[42]Other potential samples that could provide expert insight would be interim pastors that have facilitated transitions, pastors who succeed a transitional leader, or denominational leaders that have been instrumental in overseeing pastoral transitions.

4. Seek to greater define the terms and metrics of this study. This could be achieved by focusing on one of the five thematic aspects of either general, kingdom-minded, team oriented, followership, or disciple-making, and developing a clearer understanding of what each characteristic entails. This could also be achieved by concentrating on analyzing the characteristics that have been identified as "expert," "core," or "supplemental" competencies for greater clarity.

5. Conduct a comparative study between expert transitional pastors and average transitional pastors. This would require that parameters be drawn between expert and average successions. Yet, the data from a comparative study would provide helpful insight into the characteristics and competencies of the successful transitional pastor. A study along this trajectory could lead to fewer key factors and allow for greater focus of application for the competency model.

6. Initiate an analysis on an exemplary transitional pastors focusing on their actions in the three levels of leadership: proclaiming, becoming, and empowering. Because of the comprehensive nature of pastoral leadership, what a leader says, who the leader is, and what the leader does, each aspect of this transitional leadership triad impacts the success of a transition. Developing a protocol to assess the competencies of each aspect of the transitional leadership triad would yield helpful data in understanding the transitional leader. Future research could seek to create an instrument to assess transitional competencies for each aspect of transitional leadership. This analysis could create an instrument to assess transitional leadership competencies. Once developed, this model could be applied to different contexts. One example would be the application of this model in different context such as rural and urban which contain vast differences in cultural, social, and political perspectives.[43]

Conclusion

Most pastors will be part of a succession; it will be their legacy. Many are not ready to lead through this transition.[44] "Some pastors actually select their successor, but most everyone can build the kind of environment that will lead to the smoothest possible succession when the time comes."[45] The current literature has set forth a solution by calling for conversation surrounding pastoral transition while offering strategies, best

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[43]Joe Blankenau and Chuck Parker, "Assessing the Rural-Urban Divide in a Red State," *Online Journal of Rural Research & Policy* 10, no. 3 (December 2015): 2.

[44]William Vanderbloemen and Warren Bird, *Next: Pastoral Succession that Works* (Grand Rapids: Baker, 2014), 20, writes, "The sobering reality is that the majority of pastors do not have a plan for the inevitable moment when they leave their current church. . . . Likewise, the majority of churches do not have a plan for the inevitable moment when their current pastor leaves."

[45]Ibid.

practices, and personal success stories. Yet, these solutions do not provide a complete view of pastoral transition.

Many factors influence succession: church boards, search teams, influential figures within the church, church culture, and the new pastor. Every transition will be different. Yet, for most pastoral successions the most influential person will be the outgoing pastor. An established pastor wields great influence and has the unique ability to lay the groundwork for their successors' success or sow the seeds for a rocky future. In seasons of succession, a pastor's true leadership ability will be proved. The current literature has focused on a transitioning pastor's need to lead through proclaiming and empowering (the beginning and end of the transition conversation). This research has focused on the heart of transitional leadership, character, and provided a successful transitioning pastor profile which identifies the characteristics of a successful transitional pastor. This research has also developed a competency model to aid the transitioning pastor.

The resources provided by this research are designed first to help the transitioning pastor be able to identify areas of needed growth in his character profile allowing for proactive steps to refine and develop character traits. This intentionality to grow as a leader will ultimately affect the leader's abilities to be the right transitional leader. Ultimately, the character of a leader will be a guiding force that influences the transition process. Second, these findings are designed to inform and refocus the current best practices being advocated for in the current literature.

The statistical findings of this study have brought to light the need for greater emphasis to be placed on the character of the leader and thereby help to refocus and hone best practices for transitional leaders. This expert panel has identified the importance for the transitional pastor to develop character traits that allow for greater love of the church, a willingness to let go of authority, and the ability to pursue an emotional maturity which results in humility and other Christ-like characteristics. The findings have also pointed to

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the need for a greater focus to be given to the area of disciple-making and the ideals of followership which impact the transitional pastor. Finally, this research has provided a strong tool for pastors and those around them to evaluate the readiness of a transitional pastor to face succession.

Pastors need to do more than talk of transition while attempting to apply the best practices that have worked for others successions. They need to be the right leader with the right characteristics for their transition. In transition, those who seek to be the right transitional leader will ultimately learn to embrace the spiritual paradoxes given in Scripture: they will decrease so that another can increase (John 3:30), they will strive to lead while being the last and least (Matt 20:16, Luke 9:48), and they will be willing to die to produce fruit (John 12:24).

APPENDIX 1

POTENTIAL REFLECTIVE STATEMENTS
FOR TRANSITIONING PASTORS

1. I have thought about and discussed a transition plan with a colleague, mentor, or board member (Weese and Crabtree, *The Elephant in the Boardroom;* Vanderbloemen, *Next*, c. 1).
2. I have identified an individual to whom I will be transitioning my ministry (Vanderbloemen, *Next*, c. 1).
3. I plan on retiring (Vanderbloemen, *Next*, c. 1).
4. I think that I cannot be replaced (Vanderbloemen, *Next*, 27).
5. I am change resistant (Vanderbloemen, *Next*, 27).
6. I struggle to give up power (Vanderbloemen, *Next*, 27).
7. I don't have the financial stability to step away from my current role (Vanderbloemen, *Next*, *27*).
8. I can have a positive impact on my future successor (Vanderbloemen, *Next*, 28).
9. I am currently investing in other leaders (Vanderbloemen, *Next*, 57).
10. I don't have time to prepare for transition (Vanderbloemen, *Next*, 28).
11. I have put together an emergency plan (Vanderbloemen, *Next*, 33).
12. I share aspects and sometimes the full responsibility of my primary responsibilities of my position with other leaders (Vanderbloemen, *Next*, 35).
13. I plan on stepping away from my current ministry (Vanderbloemen, *Next*, 35).
14. I have another ministry role that I will be assuming outside of my current church and ministry role (Vanderbloemen, *Next*, 41).
15. How have you defined success as a pastor? Can this definition continue outside a pastoral role (Vanderbloemen, *Next*, 43, 81).
16. Discipleship (investing in like-minded and gifted individuals) has been a priority to me (Vanderbloemen, *Next*, 105).
17. I am fearful of leaving my current role (Vanderbloemen, *Next*, 49, 82).
18. I have consistently had mentors who speak into my ministry life (Vanderbloemen, *Next*, 54).
19. I am more kingdom-minded than church-focused (Vanderbloemen, *Next*, 56, 81).
20. I will be able to maximize my spiritual giftedness apart from this role (Vanderbloemen, *Next*, 63).
21. I know the greatest challenges facing me and am proactively addressing them as I look to transition from this ministry role (Vanderbloemen, *Next*, 82).
22. I will be reading books on transition and getting advice as to what transition would look like (Vanderbloemen, *Next*, 61).
23. Others would say that I micromanage (Vanderbloemen, *Next*, 73).
24. I prefer a team approach (Vanderbloemen, *Next*, 73).
25. I am willing to decrease so that others may increase (Vanderbloemen, *Next*, 109).

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26. I prefer to make decisions (Vanderbloemen, *Next*, 73).
27. I often let others speak into my life (Vanderbloemen, *Next*, 76, 81).
28. I share power well (Vanderbloemen, *Next*, 28, 105, 110).
29. I let others have the spotlight (Vanderbloemen, *Next*, 67).
30. I am able to follow others as well as lead (Ricketson, *Followership;* Vanderbloemen, *Next*, 105).

APPENDIX 2

SUMMATION OF BECOMING TRAITS

Table A1. Traits from the literature

Synthesis of Becoming Traits from *The Elephant in the Boardroom* and *Next*				
	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait	Summary of Becoming Traits
The Elephant in the Boardroom	Management an expression of discipleship (p. 16)		Disciple-maker	Disciple-maker
Next	Engage in leadership development (p. 11)		Disciple-maker	Secure Humble
	Share teaching (p. 35)		Secure, Humble, Disciple-maker	
	Allow others to lead (p. 35)		Secure, Humble, Disciple-maker	
	Leave early: Pope Benedict XVI (p. 12), Francis Chan (p. 59)		Secure, Humble	
		Loss aversion (p. 44)	Secure vs. Fearful	
		Not letting go (p. 48)	Secure vs. Fearful	
		Founder's syndrome (p. 78)	Humility vs. Hubris	
		Emotional sense of loss (p. 81)	Secure vs. Fearful	
		Overconfidence (p. 81)	Humility vs. Hubris	
		Personal loss (p. 81)	Secure vs. Fearful	
		Fear of the unknown (p. 82)	Secure vs. Fearful	

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Synthesis of Becoming Traits from *Next* and Russell, Passavant, Mullins, and Johnson			
	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait	Summary of Becoming Traits
Next cont.		Slow to find successor (p. 82)	Secure vs. Fearful	Kingdom-focused
		Need for personal comfort (p. 82)	Kingdom-focused vs. Selfish	
		Loss aversion (p. 44)	Kingdom-focused vs. Selfish	
Synthesis of Becoming Traits from Russell, Passavant, Mullins, and Johnson			
	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait	
Russell	Encourager (33-22/1285 Kindle loc.)		Encourager	Encourager
	Trustworthy (33-44/1285 Kindle loc.)		Trustworthy	Trustworthy
	Set up others for success (33-22/1285 Kindle loc.)		Mentor, Disciple-maker	Mentor
	Humor (229/1285 Kindle loc.)		Sense of humor	Humor
	Sacrifice for the greater good (813/1285 Kindle loc.)		Sacrificial, Wise	Sacrificial Wise
	Move from "the man" to "biggest fan" (857/1285 Kindle		Humility, Coach	Coach Team player
	Humble and Secure (4789/1285 Kindle loc.)		Humility, Secure	

	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait	Summary of Becoming Traits
Russell	Humble and Secure (478/1285 Kindle loc.)		Humility, Secure	
		Discipled Dave Stone (p. 132)	Disciple-maker	
		Stepped aside (p. 132)	Sacrificial, Humility, Secure	
Passavant	Team player (p. 28)		Team player	
	Share teaching (p. 36)		Humility, Disciple-maker	
		Prayer (p. 23)	Humility, Person of prayer	Person of prayer
Mullins	Healthy view of ownership ~ "not yours" (p. 6)		Humility	
	Focus on others' success (p. 6)		Mentor, Disciple-maker	
	Willing to decrease (p. 25)		Humility, Secure	
	Willing to sacrifice (p. 96)		Sacrificial, Humility, Secure	
	Humility (p. 200)		Humility	
	Surrender (p. 200)		Humility, Sacrificial, Secure	
	Integrity (p. 84)		Integrity	Integrity

	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait	Summary of Becoming Traits
Synthesis of Becoming Traits from Mullins, Johnson, Tichy				
Mullins	Secure (p. 84)		Secure	Team-oriented
		Invest in a "spiritual son" (p. 146)	Disciple-maker	
		Facilitate a team (p. 37)	Team-minded	
Johnson	Decrease so others can increase (390/3011 Kindle loc.)		Humility, Sacrificial, Secure	
	Humility Compassion Transparent Approachable Strong work ethic Lifelong learner Calling (1234/3011)		Humility Compassion Transparency Approachable Hard worker Learner Called, Secure	Compassion Transparency Approachable Hard worker Learner Called
		Soul-winner (563/3011 Kindle loc.)	Compassionate	
Synthesis of Becoming Traits from Goldsmith, Tichy, and Ciampa and Dotlich				
	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait	
Are You Ready?	Humility vs. Ego or an inflated sense of importance (p. 34)		Humility	
	Trustworthy (33-44/1285 Kindle loc.)		Trustworthy	
	Integrity Intelligence Hard worker Commitment (p. 85)		Integrity Intelligence Hard worker Commitment	Intelligence Tenacity
		Position others for success vs. Go out with a bang	Humility, Sacrificial, Others-centered	Selfless

Synthesis of Becoming Traits from Goldsmith, Tichy, Ciampa and Dotlich, May, and McCready				
	Highlighted or Suggested Successful Transition Practice	Highlighted Failed Transition Practice	Potential Becoming Trait	Summary of Becoming Traits
Are You Ready?		Coaching (p. 24)	Disciple-maker	
Succession		Develop a CEO pipeline (p. 90)	Disciple-maker	Kind
		Determine not to create drama (p. 103-124)	Humility, Kindness, Team player	
Transitions at the Top	Counselor/instructor (p. 13-14)		Disciple-maker	Emotional intelligence
	Self-management/self-awareness (p. 14)		Emotional intelligence	
	Humility vs. Hero complex (p. 174)		Humility, Awareness	Personal awareness
	Humility vs. Heroic mission complex (p. 174)		Humility, Team player	
		Establish positive relationship with successor (p. 173)	Kind, Team player	
Synthesis of Becoming Traits from May and McCready				
	Suggested Successful Transition Trait	Example of a Successful Transition Practice	Potential Becoming Trait	
May		Invest in others	Disciple-maker	
		Exit voluntarily	Sacrificial, Humility	
		Work well with others	Others-centered, Team player	
McCready		Exit voluntarily	Sacrificial, Humility	
		Invest in others	Disciple-maker	
(Vancil)		Drama-less succession	Humble, Kind, Team player	

APPENDIX 3

EXPERT PANEL PARTICIPANTS

These individuals have written extensively, are seasoned practitioners in the area of pastoral transition and leadership, or are insightful contributors to current Christian thought. These experts include (1) church-pastors who have transitioned, (2) consultants who have written on pastoral transitions, (3) individuals who have taken part in highly publicized or documented transitions, (4) experts in pastoral leadership, (5) mega-church pastors who are currently facing pastoral transitions, (6) clarion voices within the Christian community, and (7) denominational leaders who have high awareness of the inner workings of pastoral transitions within their respective denomination. The ten individuals listed below who participated on this expert panel have given permission for their names to be shared.

Table A2. Panel candidates name and affiliation

Name of Candidate	Affiliation; Publication
Dave Travis	Leadership Network; *Beyond Megachurch Myths.*
Bob Russell	Southeast Christian Church, Louisville, KY; *Transition Plan.*
Russell Crabtree	Holy Cow! Consulting; *The Elephant in the Board Room.*
Gary Johnson	Indian Creek Christian Church; *Leader><Shift.*
Eric Geiger	Senior Vice President at LifeWay Christian Resources; *Designed to Lead.*
Samuel Masters	A second-generation missionary serving in Cordoba, Argentina; President of Seminario Biblico William Carey, Argentina.
Allen Hunt	Mount Pisgah United Methodist Church, Alpharetta, GA; author, speaker, and radio show host.
Charles Lake	Community Church of Greenwood; Executive Director of Growth Ministries.
David Henderson	Covenant Church, West Lafayette, IN.
Brad Waggoner	Executive Vice President at LifeWay Christian Resources; *The Shape of Faith to Come*.

APPENDIX 4

DELPHI EXPERT PANEL INVITATION—CONSULTANTS

9/1/2017

{Name}
{Address}

Greetings {Participant},

My name is Michael Kramer. I am currently a candidate for a Ph.D. in leadership at The Southern Baptist Seminary, and I am also serving as an Education Pastor at large rural church in Southern Illinois (Immanuel Baptist Church). Over the next several months, I will be conducting research to establish, "A Qualitative Analysis of the Characteristics of a Successful Transitional Pastor." The nature of my research involves recruiting a panel of experts who have written thoughtfully on pastoral transition, successfully transitioned pastorates, or can offer insight from their unique experience into pastoral leadership.

During my research I noted that you have contributed extensively to the current conversation regarding pastoral transition in your book, {enter book}. I am writing to ask if you would be willing to be part of this expert panel. Your input is very valuable. The commitment includes completing two brief surveys and two electronic forms which are part of three rounds of questions. Your responses will be completed via links received from a software program, Qualtrics^{TM}. The total time required to complete all activities spanning three months will be 45 minutes. All information on this survey is anonymous and no personal information will be shared in the final report.

Those who agree to serve on this expert panel will gain valuable leadership insight, be given an executive summary of the findings following the completion of the study, and be extended the opportunity to join a roundtable discussion with fellow panelists regarding the findings. To confirm your participation in the study, please send an email to thewhisperinglion@gmail.com indicating the most convenient email to use for the study. Please respond within 7 days of receiving the invitation. If you have questions, please do not hesitate to contact me at thewhisperinglion@gmail.com or (618) 663-8841.

Blessings,

Michael Kramer

APPENDIX 5

DELPHI EXPERT PANEL INVITATION—
PRACTIONERS

9/1/2017

{Name}
{Address}

Greetings {Participant},

My name is Michael Kramer. I am currently a PhD candidate at The Southern Baptist Seminary, and I am also serving as an Education Pastor at large rural church in Southern Illinois (Immanuel Baptist Church). Over the next several months, I will be conducting research to establish, "A Qualitative Analysis of the Characteristics of a Successful Transitional Pastor." The nature of my research involves recruiting a panel of experts who have written thoughtfully on pastoral transition, successfully transitioned pastorates, or can offer insight from their unique experience into pastoral leadership.

During my research I noted that you would have valuable knowledge regarding pastoral transition from your personal experience. I am writing to ask if you would be willing to be part of this expert panel. Your input is very valuable. The commitment includes completing two brief surveys and two electronic forms which are part of three rounds of questions. Your responses will be completed via links received from a software program, Qualtrics™. The total time required to complete all activities spanning three months will be 45 minutes. All information on this survey is anonymous and no personal information will be shared in the final report.

Those who agree to serve on this expert panel will gain valuable leadership insight, be given an executive summary of the findings following the completion of the study, and be extended the opportunity to join a roundtable discussion with fellow panelists regarding the findings. To confirm your participation in the study, please send an email to thewhisperinglion@gmail.com indicating the most convenient email to use for the study. Please respond within 7 days of receiving the initiation. If you have questions, please do not hesitate to contact me at thewhisperinglion@gmail.com or (618) 663-8841.

Blessings,

Michael Kramer

APPENDIX 6

DELPHI EXPERT PANEL INVITATION—
INFLUENTIAL FIGURES

9/1/2017

{Name}
{Address}

Greetings {Participant},

My name is Michael Kramer. I am currently a PhD candidate at The Southern Baptist Seminary, and I am also serving as an Education Pastor at large rural church in Southern Illinois (Immanuel Baptist Church). Over the next several months, I will be conducting research to establish, "A Qualitative Analysis of the Characteristics of a Successful Transitional Pastor." The nature of my research involves recruiting a panel of experts who have written thoughtfully on pastoral transition, successfully transitioned pastorates, or can offer insight from their unique experience into pastoral leadership.

Because of your unique position as {position} and experience as {experience}, I believe that your perspective regarding pastoral transition would be insightfully. I am writing to ask if you would be willing to be part of this expert panel. Your input is very valuable. The commitment includes completing two brief surveys and two electronic forms which are part of three rounds of questions. Your responses will be completed via links received from a software program, Qualtrics^{TM}. The total time required to complete all activities spanning three months will be 45 minutes. All information on this survey is anonymous and no personal information will be shared in the final report.

Those who agree to serve on this expert panel will gain valuable leadership insight, be given an executive summary of the findings following the completion of the study, and be extended the opportunity to join a roundtable discussion with fellow panelists regarding the findings. To confirm your participation in the study, please send an email to thewhisperinglion@gmail.com indicating the most convenient email to use for the study. Please respond within 15 days of receiving the invitation. If you have questions, please do not hesitate to contact me at thewhisperinglion@gmail.com or (618) 663-8841.

Blessings,

Michael Kramer

APPENDIX 7

PARTICIPANT QUALIFICATIONS SURVEY

Agreement to Participate

The research in which you are about to participate is designed to identify the character traits of successful transitioning pastors. This research is being conducted by Michael Kramer for purposes of dissertation research. In this research, you will be asked to participate in an expert panel that will take part in a three round Delphi study. Any information you provide will be held *strictly confidential*, and at no time will your name be reported, or your name identified with your responses. *Participation in this study is totally voluntary and you are free to withdraw from the study at any time.* By your completion of this participant qualifications survey, you are giving informed consent for the use of your responses in this research.

1. Do you have experience as either a consultant, pastoral practitioner, or a regular contributor to current Christian thought in the area of pastoral transition or pastoral leadership?

    Note: Only participants who have (1) successfully facilitated pastoral transition, (2) have written on pastoral transition, (3) are connected to highly publicized or documented transitions, (4) experts in pastoral leadership, (5) individuals currently thinking critically about pastoral transitions, (6) clarion voices within the Christian community, and (7) denominational leaders who have high awareness of pastoral transitions within their respective denominations are being sought for this research.
    - o Yes
    - o No

2. Which of the following could be used to describe you? (check as many as apply)
    - o Successfully transitioned pastor
    - o Written on pastoral transition
    - o Connected to a well known pastoral transition
    - o Expert in pastoral leadership
    - o Currently thinking critically about pastoral transition
    - o Recognized voice in the Christian community that can speak to pastoral transition
    - o Denominational leader with high awareness of pastoral transitions

3. How many years of experience do you have as a consultant, pastoral practitioner, and Christian leadership?

APPENDIX 8

ROUND 1 SURVEY

The following seven questions have been developed from a distillation of the twenty-seven traits of successfully transitioning pastors found in the current literature. Footnotes have been provided for the sake of respondents that feel the need for a working definition or a greater explanation of terminology used.

Agreement to Participate
The research in which you are about to participate is designed to identify the character traits of successful transitioning pastors. This research is being conducted by Michael Kramer for purposes of dissertation research. In this research, you will be asked to participate in an expert panel that will take part in a three round Delphi study. Any information you provide will be held *strictly confidential*, and at no time will your name be reported, or your name identified with your responses. *Participation in this study is totally voluntary and you are free to withdraw from the study at any time.* By your completion of this participant qualifications survey, you are giving informed consent for the use of your responses in this research.

The following questions seek to identify character traits or qualities of a successful transitioning pastor. While the character traits and qualities of the incoming pastor are crucial to a successful handoff, this study is limited to focusing on **the outgoing pastor** NOT the incoming pastor. The pastor in focus for purpose of this study is **ONLY the pastor who is leaving** and handing off a ministry position.

1. What specific character traits or qualities do successful transitioning pastors demonstrate?

2. What are specific potential leadership blindspots of pastors that lead to unsuccessful transitions and which specific character traits or qualities overcome these blindspots?

3. What specific personal character traits or qualities enable a transitional pastor to be kingdom-focused?[1]

4. What specific personal character traits or qualities allow a transitional pastor to be team oriented, e.g. empowering others through shared leadership?[2]

5. What specific personal character traits or qualities in a transitional pastor lead to an intentional philosophy of followership, e.g. decreasing so that others may increase?[3]

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[1]The term *kingdom-focused* reflects the desire of a transitional leader to look beyond themselves and their immediate circumstances in order to see God's desire to work in the world around them. A potential pitfall of "building a church" is missing the broader vision of the kingdom. A kingdom-focused leader looks beyond their own temporal gain and the immediate gain of their church to the future of God's kingdom work.

[2]The term *team* is best understood through the action of working well with others in order to achieve a common goal which is seen when a transitional leader shares power and leverages teamwork.

[3]The term *followership* is best depicted by John the Baptist and Jesus. John the Baptist, in a pastoral leadership context, declares that he should decrease and Christ should increase (John 3:30). Jesus, while often viewed as the ideal leader, can also be seen as a follower in that His primary mission on earth was to fulfill the will of His Father (John 6:34, 10:30). Applied to the pastoral transition, a leader who

6. What specific personal character traits or qualities allow a transitional pastor to engage in disciple-making?[4]

7. What additional input in regards to relevant areas, ideas, or broad categories describing personal character traits or qualities of a successful transitional pastor can you offer?

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practices followership is a leader who is willing to decrease aspects of his leadership so that others around him may increase their leadership.

[4]The term *disciple-making* is being viewed primarily in the biblical sense of Matt 28:19-20 and 2 Tim 2:2, where there is an intentional spiritual investment in order that the individual invested in may replicate and invest in another spiritually. In a broader secondary context, disciple-making would also apply to a transitioning pastor investing in an individual for leadership development through the depositing of their experience and wisdom into an individual for an area of ministry service.

APPENDIX 9

EXPERT PANEL COMMITMENT AND TIMELINE

Michael Austin Kramer
The Southern Baptist Theological Seminary, 2017
Chair: Michael S. Wilder, Ph.D.

Expert Panel Commitment and Timeline

My research will begin the first week in October and conclude mid-December. The research involves three rounds of survey - all via e-mail links to Qualtrics^{TM}. Once a survey is sent out there is a 7 day response period for all participants. The total time commitment is probably an hour over three months. I have given a brief breakdown of the three rounds below:

Round 1 (October) - involves a three-question qualification survey and the initial survey comprising of seven brief questions (time commitment 15-30 minutes). This survey will be returned once all participants have responded so participants can choose if they are satisfied with their response in light of other participant's responses.

Round 2 (November) - involves ranking results of round 1 using a four-point scale (15 minutes). As with round 1, round 2 will be returned for any changes.

Round 3 (December) - involves a final response to round 2 results in the form of agree/disagree (15 min.).

The round table discussion at the end of the research is optional depending on the participant's interest in the results.

APPENDIX 10

EXPERT PANEL PARTICIPANT THANK YOU
AND ROUND 1 REMINDER

Dear {Participant],

Thank you for your willingness to serve on this expert panel seeking to identify the characteristics of successful transitioning pastors.

You will be receiving Round 1 via Qualtrics today as well as a 2 google calendar invites from my personal account, thewhisperinglion@gmail.com. I will be sending a follow up e-mail Monday to make sure that you have been able to access the survey.

Grace and Peace,

Michael Kramer

thewhipseringlion@gmail.com

(618) 663-8841

APPENDIX 11

INTRODUCTION LETTER TO ROUND 1 SURVEY

You have received this e-mail because you have graciously agreed to participate in an expert panel studying the characteristics of successful transitioning pastors. This is the first survey of a three round Delphi study.

Round 1 (access link below) - includes a three-question qualification survey and the initial survey comprising of seven brief questions. Expected time commitment: 15-30 minutes. As time permits, please respond promptly, as your promptness will aid the researcher's ability to compile the data and ensure the timely progression of this research.

You will be sent automatic reminders to complete this survey 72 and 96 hours after you receive this e-mail. A compilation of responses will be returned once responses have been gathered so that participants can choose if they are satisfied with their response in light of other participants' responses.

Thank you for your willingness to serve in this endeavor.

Michael Kramer

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:
${l://SurveyURL}

Follow the link to opt out of future emails:
${l://OptOutLink?d=Click here to unsubscribe}

APPENDIX 12

EXPERT PANEL PARTICIPANT ROUND 1
REMINDER TO COMPLETE SURVEY

You are receiving this e-mail as a reminder to please complete the pilot study for Michael Kramer. If you have not had the chance to finish the survey, and are still willing to complete the survey please click on the link below.

If you are having problems accessing this link or have any questions please feel free to contact Michael via e-mail at mkramer086@students.sbts.edu or by phone at (618) 663-8841.

Thank you again for your willingness to take part in this pilot study.

Michael Kramer

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:

APPENDIX 13

EXPERT PANEL PARTICIPANT ROUND 1
COMPLETION REQUEST

Hi {Participant},

Thanks for your willingness to take part in my research. I have had a strong response
thus far, and I am now reaching out to those who have expressed interest in the research
but have not had an opportunity to respond to the initial seven question survey. I hope
your schedule allows you to take part as your contribution to this conversation would be
insightful. Please let me know if you have had trouble accessing the survey (see link
below).

Late next week, I plan on sending out an overview responses that have been
received. Those who have contributed will be able to see others responses and adjust
their own responses as they see fit before the second survey is initiated.

Thanks for your consideration,
Michael Kramer

APPENDIX 14

INTRODUCTION E-MAIL TO ROUND 2 SURVEY

You have received this e-mail because you have graciously agreed to participate in an expert panel studying the characteristics of successful transitioning pastors. This is the second survey of a three a round Delphi study (access link below).

Overview:
Round two consists of six questions. Five questions will utilize a Likert rating scale (a four-level rating): 1 – not at all important, 2 – somewhat important, 3 – important, and 4 – very important. This rating system will allow you to express to what degree you agree or disagree with the responses given by the expert panel in round 1. The responses given regarding characteristics and traits of a successful transitioning pastor include – 38 general characteristics, 19 kingdom-focused characteristics, 21 team-oriented characteristics, 18 followership characteristics, and 20 disciple making characteristic. One question will give the general list of 38 character traits or qualities and ask you to choose what you consider to be the three most important character traits or qualities of a successful transitional pastor.

Time Commitment:
The expected time commitment for this survey is 15-20 minutes. As your schedule permits, you are asked to respond promptly as this will aid the researcher's ability to compile the data and ensure the timely progression of this research.

Next Steps:
You will be sent automatic reminders to complete this survey at 48 and 96 hours after you receive this e-mail. Once data is compiled from the second round of survey, answers given that fall outside of consensus will be identified and the participant will have the opportunity to change his or her answer to align with consensus or provide reasoning for remaining outside of consensus.

Thank you again for your willingness to serve in this endeavor.

Michael Kramer

APPENDIX 15

ROUND 2 SURVEY

The following six questions are a reiteration of the first round of survey seeking the characteristics of successfully transitioning pastors. An agreement to participate, explanation of the second round of survey, directions for each question, and characteristics given by the experts in the first round of survey are included in this survey.

ROUND 2 SURVEY

Agreement to Participate
The research in which you are about to participate is designed to identify the character traits of successful transitioning pastors. This research is being conducted by Michael Kramer for purposes of dissertation research. In this research, you have been asked to participate in an expert panel that will take part in a three round Delphi study. Any information you provide will be held *strictly confidential*, and at no time will your name be reported, or your name identified with your responses. *Participation in this study is totally voluntary and you are free to withdraw from the study at any time.* By your completion of this survey, you are giving informed consent for the use of your responses in this research.

Round 2
The second round of this survey will utilize a Likert rating scale. A Likert rating scale has four levels of rating: 1 – not at all important, 2 – somewhat important, 3 – important, and 4 – very important. This scale will allow you to express the degree of importance that you believe each character trait or quality, provided by the expert panel, impacts the success of a transitioning pastor.

Question 1 & 2 - Directions
Question 1 - using the Likert scale: very important, important, somewhat important, not at all important, please select the degree of importance you believe the 38 character traits or qualities, provided by the expert panel, impacts the success of a transitional pastor.

Question 2 - using the provided list of 38 character traits or qualities choose what you consider to be the three most important character traits or qualities of a successful transitional pastor. Please limit your response to three selections.

Question 1 - Character traits and qualities of a successful transitioning pastor.
Humility.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Vision for the future - willingness to lead and assemble resources for succession while preparing the congregation to flourish under the new leadership. A desire for the ministry to thrive.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Secure in themselves.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Flexibility.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

The capacity and desire to develop as a leader.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Concern - care for the good of the church.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Emotional maturity.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Sense of responsibility - ownership for the good and the bad.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Willingness to announce a definite retirement date one year in advance.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Willingness to let go of authority - the ability to let go, respect boundaries both during
and after transition, understand that they are an "interim," and release ministry to another.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Objectivity.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Vulnerability.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Teachability.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Analytical.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Optimism.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Honesty.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Clarity.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Courage.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Commitment to leadership development.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A dream for their own next chapter.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Servanthood.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Leading by example.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Trustworthiness.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Spirit-led.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Holiness.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Compassion.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Capacity for coaching others.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Transparency.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Self-awareness - knowing strengths and weaknesses.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Perceptive about qualities needed in their successor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Trust in God's providence.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A love that is greater for flock than self.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Patience to wait on the development of the successor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Generosity - willing to share friendships, relationships, credit, time, and self to ensure the success of the next pastor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Systematic - strategically able to plan.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Being on the same page with your spouse in regard to transition.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Problem solver - able to reconcile and listen.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Sense of humor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Question 2
Please identify what you consider to be **the three most important character traits or qualities** from the list of 38 character traits and qualities for a successful transitioning.

- ☐ Humility
- ☐ Vision for the future- Desire for Ministry to thrive.
- ☐ Secure
- ☐ Flexibility
- ☐ Capacity and desire to develop as a leader.
- ☐ Concern- care for the good of the church.
- ☐ Emotional maturity
- ☐ Sense of responsibility- ownership for the good and the bad
- ☐ Willingness to announce a definite retirement date one year in advance
- ☐ Willingness to let go of authority
- ☐ Objectivity
- ☐ Vulnerability
- ☐ Teachability
- ☐ Analytical
- ☐ Optimism
- ☐ Honesty
- ☐ Clarity
- ☐ Courage
- ☐ Commitment to leadership development

- ☐ A dream for their own next chapter
- ☐ Servanthood
- ☐ Leading by example
- ☐ Trustworthiness
- ☐ Spirit-led
- ☐ Holiness
- ☐ Compassion
- ☐ Capacity for coaching others
- ☐ Transparency
- ☐ Self-awareness- knowing strengths and weaknesses
- ☐ Perceptive about qualities needed in successor
- ☐ Trust in God's providence
- ☐ A love that is greater for flock than self
- ☐ Patience to wait on the development of the successor
- ☐ Generosity- willingness to share personal resources to ensure the success of the next pastor
- ☐ Systematic- strategically able to plan
- ☐ Being on the same page with your spouse in regard to transition
- ☐ Problem Solver- able to reconcile and listen
- ☐ Sense of humor

Question 3 - Directions

The following questions seek to identify the degree of importance of specific character traits or qualities allowing a successful transitioning pastor to be **kingdom focused.**

Using the Likert scale please select the importance of the 19 character traits and qualities provided by the expert panel for a transitional leader to be kingdom focused.

Character traits or qualities allowing a successful transitioning pastor to be **kingdom focused.**

Prayerful.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Servant.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Humility.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Love of God before all else - in every area of life.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Pursue God's glory versus self glory, God's will versus own ego, and put kingdom above their own agenda.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Confront tendencies to build own kingdom.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Understanding of the church as kingdom agent/instrument rather than existing for itself.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

View themselves as interim pastor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Ability to frame a succession process in Biblical terms - seeing the Biblical example of transitions: Moses/Joshua, Elijah/Elisha, Paul/Timothy.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Depersonalizing the situation - "it's not about me."
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Point people to Jesus.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Leadership development.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Desire for others to exceed you. A desire for the next generation to do more than the current generation.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Personal piety.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Retained passion for ministry versus burn-out.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Realization of mortality.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Spiritual Maturity.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Awareness - learning from others failure.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Vision for a new role for themselves that results in fruit.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Question 4 - Directions

The following questions seek to identify the degree of importance of specific character traits or qualities allowing a successful transitioning pastor to be **team oriented**, e.g. empowering others through shared leadership.

Using the Likert scale please select the importance of the 21 character traits and qualities provided by the expert panel for a transitional leader to be team oriented.

Character traits or qualities allowing a successful transitioning pastor to be **team oriented**, e.g. empowering others through shared leadership.

Humility.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Conviction of the priesthood of all believers.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A biblical understanding strengths and weaknesses in light of the spiritual gifts.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Sharing power.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Allowing team members to be independent.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Adequately developing a matured leadership team.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Empowering a transition team while stepping back as they step up.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Unselfishness - to put other's needs and interests above their own.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Able to train others.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Genuine interest in collaboration.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Entrust responsibility and authority to your team.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A desire to bring greater glory to God through the expansion of the existing ministry.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A generational view of ministry.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Service oriented.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A willingness to invest time in their leaders.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Common Convictions.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Regular, honest communication.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Mutual respect.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Sense of humor.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Recognize that others gifts are as important as that of the senior leader.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Willingness to fight natural ego.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Question 5 - Directions

The following questions seek to identify the degree of importance of specific character traits or qualities allowing a successful transitioning pastor to embrace **followership**, e.g. decreasing so that others may increase.

Using the Likert scale please select the importance of the 18 character traits and qualities provided by the expert panel for a transitional leader to embrace followership.

Character traits or qualities allowing a successful transitioning pastor to embrace **followership**, e.g. decreasing so that others may increase.

Servant leadership - others centered.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Character development through study, reflection, and others.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Self sacrifice for congregation and leadership team.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Decrease so that transition team can increase.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Empower members to contribute to the succession process.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Celebrate the success of those around you.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Humility.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Collaboration.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Optimism.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Clarity of communication.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Integrity.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Fidelity in first following Jesus.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Personal Piety - not surface level issues of leadership or management; key is found in the heart.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Developing a reproducible ministry - giving abilities away as well as giving away control.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Submissive spirit.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Love for the church - desiring the ultimate welfare of his flock, an eternal perspective.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

A sense that mission comes before self.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Ability to mentor and not be "the teacher."
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Question 6 - Directions

The following questions seek to identify the degree of importance of specific character traits or qualities allowing a successful transitioning pastor to engage in **disciple-making.**

Using the Likert scale please select the importance of the 20 character traits and qualities provided by the expert panel for a transitional leader to engage in disciple-making.

Character traits or qualities allowing a successful transitioning pastor to engage in **disciple-making.**

Vision for biblical community and discipleship.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Conviction of how the Lord has designed the kingdom to expand through maturation and reproduction - understanding the strategic role discipleship plays in the kingdom.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Consistent preaching and teaching.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Willingness to pass on what is known to others.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

In the context of a succession process, a transitional pastor will have a limited ability to make disciples and will need an external resource to develop disciples for the succession process.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Experience in discipling believers.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Experience in mentoring future leaders.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

The ability to identify and help develop spiritual gifts.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Relational.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Intentional.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Prayerful.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Urgency.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Passion for the lost.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Devotion to disciple making that replicates.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Desire to invest in the next generation for kingdom advancement.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Servant's heart - the ability to teach/lead without a condescending spirit.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Mission - centric.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

Clear thinking.
- o Very important
- o Important
- o Somewhat important
- o Not at all important

APPENDIX 16

ROUND 2 THANK YOU AND INSTRUCTIONS
FOR REVIEW OF ROUND 2 DATA

Hi [Participant],

Thank you for completing the second round of survey. I hope to return the compiled
results to you by the middle of next week. These results will include only the traits which
achieved a 70% consensus ~ 70% of the panel put that the trait was either "very
important" or "important."

If any of your answers lay outside of the 70% consensus, you will have the opportunity to
either join consensus or provide reasoning for choosing to remain outside of
consensus. Once sufficient time has been given to review and respond, we will move to
the final round of the survey. In the final round the participants will have the opportunity
to agree or disagree with the final findings of the study.

Again, thank you for your participation in this study. Your input is valuable, and I pray
that this research and your investment impacts the Kingdom.

Grace and peace,

Michael Kramer

APPENDIX 17

ROUND 2 OPPORTUNITY TO REVIEW, ALIGN WITH
CONSENSUS, OR JUSTIFY REMAINING
OUTSIDE OF CONSENSUS

Hi [Participant],

Thank you for your participation in the second round of survey. The following contains (1) a brief overview of the second round's results (2), the opportunity to align with consensus or to provide explanation why you are choosing to remain outside of consensus, and (3) the specific questions where your answers fell outside of consensus.

If any of your answers lay outside of the 70% consensus (e.g. 70% or more chose "very important" or "important" and you chose either "somewhat important" or "not at all important"), you may either choose to join consensus or provide reasoning for choosing to remain outside of consensus by responding to this e-mail with your decision.

Once sufficient time has been given to review and respond, we will move to the final round of the survey. In the final round the participants will have the opportunity to either agree or disagree with the final findings of the study.

Attached below are the comprehensive results. Thanks again for your participation in this study. Your insight is valuable.

Have a Blessed Thanksgiving!

Michael Kramer

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(1) Round 2 Results:

Question 1 ranked 38 general characteristics that impact the success of a transitional pastor. Questions 3-6 ranked 78 characteristics that impact the success of a transitional pastor using the categories of kingdom focus, team oriented, followership, and disciple making.

There were 116 total questions in round 2. Of these 116 questions, 92 traits or qualities achieved consensus. This means that 92 traits or qualities had >/= 70% of the expert panel who selected either very important or important.

Of the 92 traits that achieved consensus, 26 traits achieved total consensus. This means that 26 traits or qualities had 100% of the expert panel who selected either very important or important.

Of the 92 traits that achieved consensus, 70 traits achieved consensus with partial deviation. This means that 70 traits or qualities had < 100% of the expert panel who selected either very important or important.

	Total Questions	Consensus	Complete Consensus	Consensus with Deviation
Question #1	38	26	7	19
Question #3-6	78	66	19	47
Totals	116	92	26	66

---

(2) Aligning with consensus or reasoning for remaining outside of consensus:

Going forward, this study will focus only on the 96 questions that gained consensus of the expert panel. Your following answers, provided in the next section, were outside of the consensus of the 96 questions that gained consensus. This means that 70% or more of the expert panel selected "very important" or "important" while you selected either "somewhat important" or "not at all important." . You now have the opportunity to either align with consensus or provide your reasoning for remaining outside of consensus.

You can change your answer of "somewhat important" or "not at all important" to align with consensus by typing either "important" or "very important" below the question where your answer lies outside of consensus.

You may also chose to remain with your original answer and remain outside of consensus while providing reasoning for remaining outside of consensus below each question. If no change or reasoning is made, your answer will remain as is outside of consensus.

Example of aligning with consensus:

Q1 – Humility.

> *Important*

Example of providing reasoning for remaining outside of consensus:

Q1 – Humility.

> *I believe that humility is only somewhat important (or not at all important) because ...*

---

(3) Your answers in Question 1 and Questions 3-6 that fell outside of consensus

In question 1 you selected either "somewhat important" or "not at all important" for the following questions.   Please either join consensus by changing your answer by typing "important" or "somewhat important" below each selected question or choose to remain outside consensus and provide an explanation for your decisions.

You had no responses that fell outside of consensus. No response is needed.

In question 3-6 you selected either "somewhat important" or "not at all important" for the following questions.   Please either join consensus by changing your answer by typing "important" or "somewhat important" below each selected question or choose to remain outside consensus and provide an explanation for your decisions.

Questions 3-6: Character traits or qualities allowing a successful transitioning pastor to be . . .

<u>*Kingdom Focused*</u>

You had no responses that fell outside of consensus. No response is needed.

<u>*Team Oriented*</u>

You had no responses that fell outside of consensus. No response is needed.

<u>*Embrace Followership*</u>

You had no responses that fell outside of consensus. No response is needed.

<u>*Disciple-Making*</u>

You had no responses that fell outside of consensus. No response is needed.

Thank you for your participation!

APPENDIX 18

INTRODUCTION LETTER TO ROUND 3 SURVEY

Thank you for your continued participation in this final round of survey. Survey Link provided below.

Directions: In round 3, the expert is asked to either "agree" or "disagree" in regards to each characteristic or trait being important for a successful transitional pastor. The goal of round 3 is to reinforce consensus from round 2 as well as provide an opportunity for participants to review, revise, and specify answers.

Next Steps: Once round 3 has been completed and the data has been analyzed, participants who fall outside of consensus in any of their answers will be able to align with consensus or explain their position. This step is important to the research as it supplies understanding why the expert chose to not fall within consensus. If you have any issues with accessing the survey, please don't hesitate to e-mail me at mkramer086@students.sbts.edu. Again, thank you for your participation and valued insight on transitional pastoral leadership. I pray God uses your investment in this research to build His Kingdom.

Grace and peace,
Michael Kramer

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:
${l://SurveyURL}

Follow the link to opt out of future emails: ${l://OptOutLink?d=Click here to unsubscribe}

APPENDIX 19

ROUND 3 SURVEY

The following six questions are a reiteration of the second round of survey seeking the characteristics of successfully transitioning pastors. An agreement to participate, explanation of the third round of survey, directions for each question, and characteristics given by the experts which reached consensus in the second round of survey are included in this survey.

ROUND 3 SURVEY

Agreement to Participate
The research in which you are about to participate is designed to identify the character traits of successful transitioning pastors. This research is being conducted by Michael Kramer for purposes of dissertation research. In this research, you have been asked to participate in an expert panel that will take part in a three round Delphi study. Any information you provide will be held *strictly confidential*, and at no time will your name be reported, or your name identified with your responses. *Participation in this study is totally voluntary and you are free to withdraw from the study at any time.* By your completion of this survey, you are giving informed consent for the use of your responses in this research.

Round 3
In round 3 the same survey as in round 2 will be given for a second time excluding questions that fell outside of the consensus in round 2. Consensus was achieved when 70% or more of the participants selected very important or important for a characteristic. For round 3, the expert is asked to either "agree" or "disagree" in regards to each characteristic or trait being important for a successful transitional pastor. The goal of round 3 is to reinforce consensus from round 2 as well as provide an opportunity for participants to review, revise, and specify answers.

This will be the final round of survey.

Question 1 - Directions
Using the dichotomous scale: agree or disagree, please select whether you believe each of the following 26 character traits or qualities are important for a successful transitioning pastor.

Question 1 - the following character traits or qualities are important for a successful transitioning pastor (the pastor who is leaving).

Humility.
        Agree
        Disagree

Vision for the future - willingness to lead and assemble resources for succession while preparing the congregation to flourish under the new leadership. A desire for the ministry to thrive.
        Agree
        Disagree

Secure in themselves.
        Agree
        Disagree

Flexibility.
>Agree
>Disagree

Concern - care for the good of the church.
>Agree
>Disagree

Emotional maturity.
>Agree
>Disagree

Sense of responsibility - ownership for the good and the bad.
>Agree
>Disagree

Willingness to let go of authority - the ability to let go, respect boundaries both during and after transition, understand that they are an "interim," and release ministry to another.
>Agree
>Disagree

Optimism.
>Agree
>Disagree

Honesty.
>Agree
>Disagree

Clarity.
>Agree
>Disagree

Courage.
>Agree
>Disagree

Commitment to leadership development.
>Agree
>Disagree

A dream for their own next chapter.
>Agree
>Disagree

Servanthood.
>Agree
>Disagree

Leading by example.
>Agree
>Disagree

Trustworthiness.
>Agree
>Disagree

Spirit-led.
>Agree
>Disagree

Holiness.
>Agree
>Disagree

Transparency.
>Agree
>Disagree

Self-awareness - knowing strengths and weaknesses.
>Agree
>Disagree

Trust in God's providence.
>Agree
>Disagree

A love that is greater for flock than self.
>Agree
>Disagree

Patience to wait on the development of the successor.
>Agree
>Disagree

Generosity - willing to share friendships, relationships, credit, time, and self to ensure the success of the next pastor.
>Agree
>Disagree

Being on the same page with your spouse in regard to transition.
>Agree
>Disagree

Question 2
Please rank from 1 to 6 what you consider to be the most important character traits or qualities for a successful transitioning pastor (1 = most important, 2 = 2nd most important, 3 = 3rd most important...)

- o Humility.
- o Vision for the future- desire for Ministry to thrive.
- o Concern- care for the good of the church.
- o Willingness to announce a definite retirement date one year in advance.
- o Willingness to let go of authority.
- o Spirit-led.

Question 3 - Directions
Using the Dichotomous scale (agree or disagree) please select whether you agree or disagree that each of the 16 character traits and qualities are important for a successful transitional leader to be kingdom focused.

Please either agree or disagree that the following character traits or qualities are important in allowing a successful transitioning pastor to be kingdom focused.

Prayerful.
> Agree
> Disagree

Servant.
> Agree
> Disagree

Humility.
> Agree
> Disagree

Love of God before all else - in every area of life.
> Agree
> Disagree

Pursue God's glory versus self glory, God's will versus own ego, and put kingdom above their own agenda.
> Agree
> Disagree

Confront tendencies to build own kingdom.
> Agree
> Disagree

Understanding of the church as kingdom agent/instrument rather than existing for itself.
> Agree
> Disagree

Depersonalizing the situation - "it's not about me."
> Agree
> Disagree

Point people to Jesus.
> Agree
> Disagree

Leadership development.
> Agree
> Disagree

Desire for others to exceed you. A desire for the next generation to do more than the current generation.
> Agree
> Disagree

Personal piety.
> Agree
> Disagree

Retained passion for ministry versus burn-out.
> Agree
> Disagree

Realization of mortality.
> Agree
> Disagree

Spiritual Maturity.
> Agree
> Disagree

Awareness - learning from others failure.
> Agree
> Disagree

Question 4 - Directions

Using the Dichotomous scale (agree or disagree) please select whether you agree or disagree that each of the 16 character traits and qualities are important for a successful transitional leader to be team oriented, e.g. empowering others through shared leadership.

Please agree or disagree that the following character traits or qualities are important in allowing a successful transitioning pastor to be team oriented, e.g. empowering others through shared leadership.

Humility.
> Agree
> Disagree

A biblical understanding strengths and weaknesses in light of the spiritual gifts.
> Agree
> Disagree

Sharing power.
> Agree
> Disagree

Adequately developing a matured leadership team.
> Agree
> Disagree

Empowering a transition team while stepping back as they step up.
> Agree
> Disagree

Unselfishness - to put other's needs and interests above their own.
> Agree
> Disagree

Able to train others.
> Agree
> Disagree

Genuine interest in collaboration.
> Agree
> Disagree

Entrust responsibility and authority to your team.
> Agree
> Disagree

A desire to bring greater glory to God through the expansion of the existing ministry.
> Agree
> Disagree

A willingness to invest time in their leaders.
> Agree
> Disagree

Common Convictions.
              Agree
              Disagree

Regular, honest communication.
              Agree
              Disagree

  Mutual respect.
              Agree
              Disagree

Recognize that others gifts are as important as that of the senior leader.
              Agree
              Disagree

Willingness to fight natural ego.
              Agree
              Disagree

Question 5 - Directions
Using the Dichotomous scale (agree or disagree) please select whether you agree or disagree that each of the 18 character traits and qualities are important for a successful transitional leader to embrace followership, e.g. decreasing so that others may increase.

Please either agree or disagree that the following character traits or qualities are important in allowing a successful transitioning pastor to embrace followership, e.g. decreasing so that others may increase.

Servant leadership - others centered.
              Agree
              Disagree

Character development through study, reflection, and others.
              Agree
              Disagree

Self sacrifice for congregation and leadership team.
              Agree
              Disagree

  Decrease so that transition team can increase.
              Agree
              Disagree

Empower members to contribute to the succession process.
              Agree
              Disagree

Celebrate the success of those around you.
>Agree
>Disagree

  Humility.
>Agree
>Disagree

Collaboration.
>Agree
>Disagree

Optimism.
>Agree
>Disagree

Clarity of communication.
>Agree
>Disagree

Integrity.
>Agree
>Disagree

Fidelity in first following Jesus.
>Agree
>Disagree

Personal Piety - not surface level issues of leadership or management; key is found in the heart.
>Agree
>Disagree

Developing a reproducible ministry - giving abilities away as well as giving away control.
>Agree
>Disagree

Submissive spirit.
>Agree
>Disagree

Love for the church - desiring the ultimate welfare of his flock, an eternal perspective.
>Agree
>Disagree

A sense that mission comes before self.
>Agree
>Disagree

Ability to mentor and not be "the teacher."
>Agree
>Disagree

Question 6 - Directions
Using the Dichotomous scale (agree or disagree) please select whether you agree or disagree that each of the 16 character traits and qualities are important for a transitional leader to engage in disciple-making.

Please either agree or disagree that the following character traits or qualities are important in allowing a successful transitioning pastor to engage in disciple-making.

Vision for biblical community and discipleship.
>Agree
>Disagree

The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish.
>Agree
>Disagree

Consistent preaching and teaching.
>Agree
>Disagree

Willingness to pass on what is known to others.
>Agree
>Disagree

Experience in discipling believers.
>Agree
>Disagree

Experience in mentoring future leaders.
>Agree
>Disagree

Relational.
>Agree
>Disagree

Intentional.
>Agree
>Disagree

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Prayerful.
        Agree
        Disagree

Passion for the lost.
        Agree
        Disagree

Devotion to disciple making that replicates.
        Agree
        Disagree

Desire to invest in the next generation for kingdom advancement.
        Agree
        Disagree

Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth.
        Agree
        Disagree

Servant's heart - the ability to teach/lead without a condescending spirit.
        Agree
        Disagree

Mission - centric.
        Agree
        Disagree

Clear thinking.
        Agree
        Disagree

APPENDIX 20

ROUND 3 THANK YOU AND INSTRUCTIONS
FOR REVIEW OF ROUND 3 DATA

Hi {Participant},

Thank you for completing the third round of survey. I hope to return the compiled results
of the final round to you shortly. This will allow you to review and if desired change
your response in light of the other experts' responses.

Round 3 The third round of a Delphi study is designed to drive consensus. As expected
all 92 characteristics for a successful transitioning pastor remained in consensus.

Action
If any of your answers fell outside of the final consensus of round 3, you will have the
opportunity to either join consensus or provide reasoning for choosing to remain outside
of consensus. If you have already provided reasoning for remaining outside of consensus
in the previous round, your prior answers are sufficient justification for the 3rd round.

If all of your answers fell within consensus you are welcome to review and change any of
your answers based on the other experts response, but no response is needed.

Again, thank you for your participation in this study.

Grace and peace,
Michael Kramer

APPENDIX 21

ROUND 2 EXPERT RESPONSES FOR REMAINING
OUTSIDE OF CONSENSUS

Experts' responses are organized by question and characteristic.
1. Character traits and qualities of a successful transitioning pastor.
   1.1 Participant Responses
      1.1.21 (Servanthood.) "Disagree somewhat because of definition. For some
           servanthood is described as wanting to serve in whatever way
           possible...but another could look at a very strong leader that would claim
           they serve best by being the leader."

      1.1.24 (Spirit-led.) "While in charismatic traditions this is seen as very positive
           trait, in some other traditions, that is not a prerequisite for successful
           transition."

      1.1.25 (Holiness.) "While preferred of course, the Baptist definition of holiness
           often differs greatly from others definition."
      1.1.33 (Patience.) "Disagree - Nonsense - This assumes an internal successor."
3. Character traits and qualities allowing a successful transitioning pastor to be kingdom
   focused.
   1.3 Participant Responses
      1.3.70 (Depersonalizing the situation – 'it's not about me.') "Uh, in Founder
           situations it often is "about the leader" including the founder."
      1.3.74 (Personal Piety.) "Again, while important, have worked with some whose
           personal piety would be considered much weaker than many other
           pastors."
      1.3.75 (Retained passion for ministry versus burn-out.) "Again - if the pastor is
           sticking around - absolutely agree. But then again, sometimes it is best in a
           burn out situation to have the person acknowledge. In fact, if the former
           leader realizes this and is self aware about it, the succession may actually
           have a better shot."
4. Character traits or qualities allowing a successful transitioning pastor to be team
   oriented, e.g. empowering others through shared leadership.
   1.4 Participant Responses
      1.4.82 (A biblical understanding strengths and weaknesses in light of the spiritual
           gifts.) "Not sure the leader has to know this. Others have to know, but
           leaders can be clueless."
      1.4.88 (Able to train others.) "While a good thing, not a necessary thing. In large
           church teams there is often someone that plays that role but it doesn't have
           to be the lead pastor."

1.4.90 (Entrust responsibility and authority to your team.) "In King situations the trust is not necessarily granted but earned."

5. Character traits or qualities allowing a successful transitioning pastor to embrace followership, e.g. decreasing so that others may increase.

1.5 Participant Responses

1.5.107 (Humility.) "You have to remember that while many large church pastors have some humility, a lot of outsiders wouldn't see it this way."

1.5.114 (Developing a reproducible ministry – giving abilities away as well as giving away control.) "Again - not a bad thought unless what they have been reproducing for generations is not working anymore. This assumes that you want continuity. And often that is not what is needed."

6. Character traits or qualities allowing a successful transitioning pastor to engage in disciple-making.

1.6 Participant Responses

1.6.119 (Vision for biblical community and discipleship.) "Undefined as to biblical."

1.6.128 (Relational.) "Again, all these qualities are good, but I would not consider them essential to this issue of succession. We are clouding the issue of succession with generalized qualities."

1.6.130 (Prayerful.) "Again, all these qualities are good, but I would not consider them essential to this issue of succession. We are clouding the issue of succession with generalized qualities."

1.6.132 (Passion for the lost.) "Again, all these qualities are good, but I would not consider them essential to this issue of succession. We are clouding the issue of succession with generalized qualities."

1.6.133 (Devotion to disciple making that replicates.) "Again, all these qualities are good, but I would not consider them essential to this issue of succession. We are clouding the issue of succession with generalized qualities."

APPENDIX 22

ROUND 3 EXPERT RESPONSES FOR REMAINING
OUTSIDE OF CONSENSUS

One expert wrote the following in response to remaining outside of consensus:

"In my experience, humility is not a critical issue for pastors in a succession process for these reasons:

Every quality, like humility, has a shadow side, which, if not integrated causes problems. For humility, that tends toward a lack of assertiveness. Again, in my experience, the pastor has always had to lead in setting the ball rolling in a succession planning process, including selecting a consultant and making sure resources are available to pay for that consultant.

It is my observation that most successful pastors are not particularly humble. Their gifts tend to fall in other areas. A key motivation for most "succession pastors" is preservation of a legacy which is not about humility either. I generally find that pastors who are not self-aware and trying to appear humble are the most difficult to deal with in a succession process.

Now if you are defining humility as a pure quality that has no shadow, then I suppose I don't know how to rank it against all the others. This is where I struggled with the survey."

APPENDIX 23

COLLATION OF EXPERT, CORE, AND SUPPLEMENTAL PROFICIENCIES

Table A3. Expert competencies

Characteristic Grouping	Character Traits	Mean Rating
General Characteristics	Concern- care for the good of the church.	3.92
	Willingness to let go of authority	3.92
	Emotional maturity	3.85
	A love that is greater for flock than self	3.77
	Humility	3.69
	Honesty	3.62
	Trustworthiness	3.62
	Trust in God's providence	3.62
Kingdom Focused	Pursue God's glory versus self-glory. God's will versus own ego, and put kingdom above their own agenda.	3.92
	Love of God before all else – in every area of life.	3.69
	Spiritual Maturity.	3.69
	Confront tendencies to build own kingdom.	3.62
Team Oriented	Willingness to fight natural ego.	3.77
	Humility.	3.69
	Unselfishness - to put other's needs and interests above their own.	3.62
	A willingness to invest time in their leaders.	3.62
	Regular, honest communication.	3.62
	Mutual respect	3.62
Followership	Clarity of communication.	3.85
	Love for the church - desiring the ultimate welfare of his flock, an eternal perspective.	3.85
	Celebrate the success of those around you.	3.77
	Integrity.	3.69
	Servant leadership - others centered.	3.62
	Self sacrifice for congregation and leadership team.	3.62
	Humility.	3.62
	Fidelity in first following Jesus.	3.62
	A sense that mission comes before self.	3.62
Disciple Making	Consistent preaching and teaching.	3.62

Table A4. Core competencies

Characteristic Grouping	Character Traits	Mean Rating
General Characteristics	Leading by example	3.54
	Spirit-led	3.54
	Self-awareness- knowing strengths and weaknesses	3.54
	Vision for the future- Desire for Ministry to thrive.	3.38
	Secure	3.38
	Courage	3.38
	Commitment to leadership development	3.38
	A dream for their own next chapter	3.38
	Generosity- willingness to share personal resources to ensure the success of the next pastor	3.38
	Servanthood	3.31
Kingdom Focused	Humility.	3.54
	Point people to Jesus	3.46
	Desire for others to exceed you. A desire for the next generation to do more than the current generation.	3.46
	Prayerful.	3.46
	Servant.	3.38
	Depersonalizing the situation - "it's not about me."	3.38
	Understanding of the church as kingdom agent/instrument rather than existing for itself.	3.31
	Personal piety.	3.31
Team Oriented	Recognize that others gifts are as important as that of the senior leader.	3.54
	Entrust responsibility and authority to your team.	3.54
	Adequately developing a matured leadership team.	3.46
	A biblical understanding strengths and weaknesses in light of the spiritual gifts.	3.31
	Sharing power.	3.31
	Empowering a transition team while stepping back as they step up.	3.31
	Genuine interest in collaboration.	3.31
Followership	Decrease so that transition team can increase.	3.46
	Optimism.	3.46
	Collaboration.	3.31
	Personal Piety - not surface level issues of leadership or management; key is found in the heart.	3.31
	Developing a reproducible ministry - giving abilities away as well as giving away control.	3.31
Disciple Making	Willingness to pass on what is known to others.	3.54
	Intentional.	3.54
	Unselfish spirit - willing to give time to invest in others - coming alongside an individual in order to invest in their spiritual growth.	3.54
	Servant's heart - the ability to teach/lead without a condescending spirit.	3.54
	The priority of encouraging the spiritual growth and development of those around us - giving of oneself so that others might grow and flourish.	3.46
	Prayerful.	3.38
	Vision for biblical community and discipleship.	3.31

Table A5. Supplemental competencies

Characteristic	Character Traits	Mean Rating
General Characteristics	Clarity	3.23
	Sense of responsibility- ownership for the good and the bad	3.23
	Patience to wait on the development of the successor	3.23
	Holiness	3.23
	Transparency	3.15
	Being on the same page with your spouse in regard to transition	3.15
	Flexibility	3.08
	Optimism	3.08
Kingdom Focused	Leadership development.	3.15
	Awareness - learning from others failure.	3.15
	Retained passion for ministry versus burn-out.	3.08
	Realization of mortality.	3
Team Oriented	A desire to bring greater glory to God through the expansion of the existing ministry.	3.23
	Common Convictions.	3.15
Followership	Empower members to contribute to the succession process.	3.23
	Submissive spirit.	3.23
	Ability to mentor and not be "the teacher."	3.15
	Character development through study, reflection, and others.	3.15
Disciple Making	Devotion to disciple making that replicates.	3.23
	Desire to invest in the next generation for kingdom advancement.	3.23
	Mission - centric.	3.23
	Experience in discipling believers.	3.15
	Experience in mentoring future leaders.	3.15
	Relational	3.08
	Passion for the lost.	3.08
	Clear thinking.	3.08

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ABSTRACT

A LEADERSHIP PROFILE OF THE SUCCESSFUL
TRANSITIONAL PASTOR: A DELPHI STUDY

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Over the last fifteen years denominational decline coinciding with megachurches led by iconic pastoral personalities has changed the playing field of pastoral transition. The current pastoral succession conversation has addressed the pastor's responsibility in succession and provided snapshots of functional transitional plans. The question that now needs addressed is, "What does it take to be a transitional leader?" or "What is the leadership profile of a successful transitional pastor?"

While the current literature contains hints at what the traits of a successful transitioning leader should be, these characteristics have yet to be statistically identified. Once systematically studied these traits would allow an individual to measure and improve areas of perceived growth.

The purpose of this qualitative analysis of the characteristics of successfully transitioning pastors is to statistically identify the traits of a successful transitional pastor to prepare pastors to become transitional leaders. To accomplish this a qualitative study was prepared. Chapter 1 provides the need for the study—pointing to a void in the literature surrounding pastoral transition, specifically the identification of characteristics of successfully transitioning pastors. Chapter 2 reviews the current literature and distills 27 characteristics identified in pastoral, secular, and academic writings. Chapter 3 outlines the research design, which utilizes a Delphi study engaging an expert panel. Chapter 4 provides analysis of the Delphi panel results including a successful transitional

pastoral profile and a transitional pastor competency model. Chapter 5 offers research

applications noting the statistical prominence given to followership and confusion

surrounding disciple-making, the statistical importance of the characteristics of

willingness to let go of authority, concern for the church, and emotional maturity, as well

as statistical implications for the use of a successful transitional profile and competency

model for self-assessment, church leadership, and academic training.

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