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ABSTRACT

The challenge of change in the transition from one spiritual leader to another has two facets: the "letting go" of the departing pastor and the adoption of a new spiritual leader. A Transition Committee of a mid-sized Episcopal church in rural Washington State has used the Rogers 1962 Adoption Model to develop an intentional plan to influence the change process and acceptance of the "new." Steps or stages in the Adoption Model are awareness, interest, evaluation, trial, and adoption. As developed by the Transition Committee, two models correspond to two separate change or adoption processes that exist: one adoption model that would lead to positive disengagement and another that would lead to positive engagement. Although this process is not complete at the church, some conclusions are evident: (1) involvement of clergy is paramount; (2) designing activities to deal with the process around change in institutionalized church life is intentional not accidental; (3) participation by all congregants creates more ownership over the entire change process; and (4) monitoring of acceptance of change is important. (12 references) (YLB)

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*Selection of a new Spiritual Leader:
Adult Education Strategies Applied to the Facilitation of Change & Acceptance in
Religious Congregations*

A. Paper Presentation

by

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for

American Association for Adult and Continuing Education

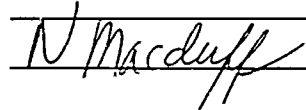
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The letter came in the mail announcing the retirement of a healthy, active, and respected senior pastor. To say it was unexpected is an understatement. Within weeks the assistant pastor announced his retirement and plans to move 300 miles from the parish. All this occurred at the same time as the retirement of a much beloved Bishop and the appointment of a younger man to replace him. The fusillade of change raised anxiety levels to stratospheric proportions.

For leaders in synagogues and churches, lay and clergy, these events might seem tame. Clergy are leaving some denominations in epidemic proportions. A cursory appraisal of magazine and journal articles on "clergy placement" showed a disproportionately higher number of articles on Roman Catholic clergy change (about 3 to 1) as to other denominations.

The number of potential retirements for churches in the next 10 years is shocking. In 1987 54% of the clergy in the United Church of Christ were between the ages of 50 and 65.(1) For American Baptists and Lutherans it was 40%. Two Lutheran denominations had between 35% - 40% of clergy between 50 and 65 years of age. In addition to retirement, research tells us that the majority of clergy change jobs every seven years. (2) Thousands of congregations face the change of clergy each day in North America. Lay people must deal regularly with the fall out from changes in clergy, including the "letting-go" of the retiring or departing pastor and the adoption or acceptance of new clergy.

One surmises that years of religious and secular education prepare the laity to develop systems or processes to implement such change. Many denominations have developed sophisticated hiring systems to select a new spiritual leader. The Episcopal church, for example, assists local congregations with the "search" process through the availability of such things as congregational surveys, a jobs data bank, and a step-by-step system to make the right personnel decisions. What the process does not do is address the issue of individual and collective reactions to change. In an article on the tensions between laity and clergy, Rembert Weakland asserts that "...religious education of our laity did not

keep pace with the the level of their secular education, our people were expected to take their place in society, business and academia with only grade school religious training." (3)

In early 1990 the senior pastor at a mid-sized Episcopal church in rural Washington State announced his retirement for January 1991. Following this message was the revelation that the assistant pastor would also retire in a matter of months. This 125 year old church has a stable congregation in a community with a diversified economy with the primary industries being agriculturally related. In 1989 monthly average attendance ranged from 160 - 200 with a high of 274 and low of 113. The number of pledging families during this year was over 140(4). The church budget in 1989 was \$218,000, with substantial investment income from endowment.(5)

The church staff includes the two pastors, with the senior pastor serving the congregation for almost 20 years and the assistant pastor serving 4. Other staff, mostly part time, include a secretary, bookkeeper, youth director, music director, and education coordinator. A strong core of volunteers organizes and implements educational programs, spiritual renewal projects, community outreach to a food bank for the needy and a shelter for homeless families. While not without the problems, the congregation is healthy and thriving, holding membership numbers even (in an area of declining population) and attracting young families.

The resignations resulted in the appointment of a Search Committee charged with the responsibility of "searching" for someone to accept the pastorate of the church. Their activities included developing a budget, surveying the congregation, reviewing the job description, salary and benefits package, soliciting applications, and arranging for prospective candidates to preach and meet members of the churches governing body (Vestry). Ultimately it would be the Vestry that would decide on the new clergy person, based on a recommendation from the Search Committee.

The Pastoral Care Committee is charged with monitoring the spiritual health of the congregation. Its job is to design and implement activities and programs to enhance spirituality among the laity. The Co-Chairpersons of this committee examined the changes

the congregation faced in coming months and offered to organize an effort to smooth the process and lessen the potential negative impact of change. Numerous studies of the change in leadership for voluntary non-profit organizations indicate that the loss of a "long-time" leader negatively influences the success of the person following them.

The challenge of change in the transition from one spiritual leader to another is two faceted. One facet deals with the "letting-go" of the departing pastor. Over time the congregation realizes that the person they know as spiritual leader will not be available for the funeral of their mother, to marry their son, or baptize a new child. The other facet of change is the adoption or acceptance of a new spiritual leader. Parishioners realize the sermons will be new, the liturgy adapted, the hymns selected might be harder, the "running" of church committees and governing boards is bound to change. One lay person described the retirement of his pastor, "In the weeks that followed, my emotions cycled through Kubler-Ross's stages of grief. Just when I thought the final stage of acceptance had been achieved, something would send me back to denial or anger. (6) Precisely.

Both the congregation as a body and individuals in the church experience some type of change process. Could it be monitored and impacted by pro-active steps? Could strategies be implemented to address the expected process or reactions to the change: shock, disbelief, guilt, projection, rationalization, integration, and finally acceptance. Any proposed activities had to be integrated with "intentionality" to bring about change in rational and harmonious stages for the majority of congregants.

The Pastoral Care Committee elected to use Rogers 1962 Adoption Model to address the spiritual needs of the congregation. To develop an intentional plan to influence positively the change process and acceptance of the "new." The "Adoption" model has had widespread successful use in Canadian and U.S. Cooperative Extension Service programs, where farmers and farm families are introduced to new ideas or methods. Coolie Verner, a Canada Extension official fine-tuned the model for application among rural and farm families. As a model for application in a church setting it could be regarded as energizing, giving

ownership of the process to individuals and the congregation, maximizing creativity, and leading some to view the change as an exciting and healthy process.

The following are the steps or stages in the Adoption Model:

Awareness: the individual becomes aware of an idea, practice, concept, but knows little about it.

Interest: the person looks for more information, developing an interest in the topic

Evaluation: it is here that the individual makes a mental trial, making application to his/her own life

Trial: This is the stage where practice occurs. Usually the person tries the new idea, concept, or skill on a small scale to minimize the risk.

Adoption: If the new thing has proven acceptable on a small scale, it will be adopted for full scale use.(7)

The Pastoral Care Committee sought approval from church clergy and lay leaders to proceed with a plan to use the Adoption Model. The senior pastor and governing board (Vestry) endorsed the project whole-heartedly. The Search Committee Chairman seemed to breathe a sigh of relief to have help in dealing with the challenge of change.

A Transitions Committee was formed. Members were recruited who regularly attended one of the two weekly services and thus had a wide network of contacts. Some Transition Committee members are active participants in church life and others less so. Age range was from 40's to 60's. A common thread for each person was concern for the congregation as it transitioned from one spiritual leader to another. This was concern for personal feelings and attitudes toward the change.

Following recruitment, the Transition Committee met for a brief training session on change behaviors and the "Adoption" model. The typical change reactions were reviewed by the committee. Committee members recalled their friends reactions or their own and explored how others were feeling similarly. They then used the Adoption Model to design

and implement strategies to positively affect the reaction to change . Each step in the model was discussed, defined, and explained. Specific activities, programs, or behaviors were selected to implement that step for the congregation. As the Transitions Committee worked through the steps it became clear that some things had already been implemented to impact the reaction to change. This illustrated to the committee that change is a natural process which can be managed or planned for, it need not occur accidentally, only.

ADOPTION MODEL - Clergy Disengagement

ADOPTION STEP	STRATEGY
AWARENESS	<ul style="list-style-type: none"> a. letter of resignation by senior pastor to everyone on the mailing list b. announcement of assistant pastor retirement from pulpit and in newsletter c. make sure all members of church family are notified of retirement by checking the mailing list for the church newsletter d. obtain support of clergy and vestry for this project before proceeding.
INTEREST	<ul style="list-style-type: none"> a. article on retirement by senior pastor in all parish newsletter b. appointment of Search Committee c. formation of Transitions Committee to address the issue of change d. plans for all parish retirement dinners e. encouragement to both pastors to mention their retirement often and appropriately
EVALUATION	<ul style="list-style-type: none"> a. sermons on change from the scripture b. sermon on retirement from both pastors c. guest sermon from retired pastor living in the area d. encouragement to Search Committee to keep the congregation well informed on their progress e. regular monthly article on general topic of change in all parish newsletter
TRIAL	<ul style="list-style-type: none"> a. adult education class "The Christian Challenge of Change." b. going away party for assistant pastor including entire congregation c. planned small dinners as "retirement celebration" for senior pastor d. all parish event to celebrate retirement of senior pastor e. encourage both retiring pastors to mention their plans for retirement; hobbies, traveling, leisure, Christian fellowship
ADOPTION	<ul style="list-style-type: none"> a. open discussion of change and its effect on individual and congregation b. attendance at "change" class, small dinners, and all parish events c. laity leadership over activities and events in the period between retirements and appointment of new clergy. (Measurements/behaviors established by committee to ascertain the degree of acceptance of change)

It was quickly noted by members of the Transition Committee that two separate change or adoption processes existed. The planning needed to proceed in a parallel track. Time tables were different and some of the strategies overlapped, one adoption model lead to positive disengagement and the other to positive engagement. For that reason, strategies were developed independently for the Clergy Engagement process.

ADOPTION MODEL - Clergy Engagement

ADOPTION STEP	STRATEGY
AWARENESS	<ul style="list-style-type: none"> a. Search Committee selection is publicized in all parish newsletter b. establishment of time table for selection of new clergy
INTEREST	<ul style="list-style-type: none"> a. survey of parish members on their vision of the church and its needs b. regular reports from Search Committee to congregation - written and oral.
EVALUATION	<ul style="list-style-type: none"> a. adult education class "The Christian Challenge of Change." b. sermons on being "new clergy"(current clergy & guests) c. regular monthly article on change in monthly all parish newsletter d. congregation encouraged to see their role as hosts during candidate visits
TRIAL	<ul style="list-style-type: none"> a. hosted dinners for clergy applicants by members of congregation who are not on Search Committee or Vestry b. "personal commitments" to actively practice welcoming strategies for 3 months after the arrival of the new pastor.(During Lent parishioners are asked to make a personal commitment with the Lord to take pro-active steps to more fully understand the meaning of Lent. This takes the form of a written contract form that is presented at the altar as an offering on either Ash Wednesday or the first Sunday in Lent) (Sample on page 10) c. welcome dinner for entire church family d. several stories about "life and times" of the pastor in the newsletter and through sermons.
ADOPTION	<ul style="list-style-type: none"> a. references to new pastor as "our" or "my" b. invitations by parishioners to new pastor to non-church events c. public support for clergy when he/she suggests change in church-related thing. (Measurements/behaviors established by committee to ascertain the degree of acceptance of change)

This process is partially complete. The assistant pastor has departed, following a delightful church party wishing him God-speed. The Vestry funded a course for both pastors on "Being an Interim Minister." Attendance at official "goodbye" functions and other all-parish events has been on the increase. Both pastors report open conversations with congregants about their leaving. They believe this is happening because discussing "the pain of change" was sanctioned and approved. Several individuals close to the clergy report a growing comfort with the impending loss. There are a number of indicators that this process is creating positive atmosphere for change. Only time and personal experience can be the final judge. Obviously it is too early to assess the impact of the arrival of the new pastor.

CONCLUSIONS

1. The **involvement** of current clergy and the leadership of the church or synagogue is paramount to the success of such an endeavor.
2. The importance of the change process is placed on a par **equal to the importance** of the management function of hiring and personnel change.
3. Designing activities to deal with the process and feelings around the most important change in institutionalized church life is **intentional** rather than accidental.
4. **Participation** by more congregants than the Search Committee creates more ownership over the entire change process. More ownership means more effort to see that it works.
5. The change process is not seen as secular phenomena, but is placed in **doctrinal context** using scripture as the foundation for understanding personal feelings and behavior.
6. Planning for clergy change involves two types of change, **positive disengagement and engagement.**
7. Change management activities must be varied to attract as wide a **variety** of people, at some point in the process, as possible.
8. **Monitoring** of acceptance of change is important. It cannot be assumed that change acceptance strategies will work for everyone.

Authors note: The process described in this paper is incomplete. The senior pastor will not leave until January of 1991. The Search Committee has 40+ applicants for the new position and is scheduling interviews. The Transition Committee members have scheduled dinners, written newsletter articles on change, prepared a two session class on change, and monitored behavior and reaction around the church family. They will meet to more fully plan for the new clergy person in early December. While incomplete, this effort has met with encouragement and approbation from clergy, church leaders, and congregants. It gives all the appearances of effective adult learning at work.

Footnotes

- [1] Hallstrand, pg. 14
- [2] Scott, Douglas, pg. 35
- [3] Weakland, pg. 201
- [4] St. Paul's Vestry minutes, March 1990
- [5] St. Paul's Annual Budget 1990
- [6] Kageler, pg. 91
- [7] Kirkpatrick, pg. 32

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1990 LENT PERSONAL COMMITMENT CARD	
1990 LENT PERSONAL COMMITMENT CARD	
Place on the Altar Sunday, February 25th or Wednesday, February 28th	
GOD WILLING, DURING LENT, I WILL PARTICIPATE IN . . .	
<input type="checkbox"/>	Regular Sunday Worship
<input type="checkbox"/>	I will keep a Daily Prayer, Devotion, meditation time
<input type="checkbox"/>	I will participate at the 11:15 A.M. Wednesday Eucharist
<input type="checkbox"/>	I will attend the Sunday, 9:15 a.m. Mark Bible Study
<input type="checkbox"/>	I will participate with a "Serendipity" Small Group Bible Study
<input type="checkbox"/>	I will bring a friend to church
<input type="checkbox"/>	I will give a special gift to the charity that "warms" my heart
<input type="checkbox"/>	Your own creative choice--something that will make you a more worthwhile person

