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RELAY SUCCESSION IN THE SENIOR PASTORATE:  
A MULTIPLE CASE STUDY METHOD

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A Dissertation  
Presented to  
the Faculty of  
The Southern Baptist Theological Seminary

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Doctor of Philosophy

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by  
Robert Collison McCready  
December 2011

**APPROVAL SHEET**

RELAY SUCCESSION IN THE SENIOR PASTORATE:  
A MULTIPLE CASE STUDY METHOD

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*Soli Deo Gloria*

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## LIST OF ABBREVIATIONS

COG Church of God (Cleveland, Tennessee)

SBC Southern Baptist Convention

SP&M Succession Planning and Management



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## PREFACE

Eleven years ago God called me to my first vocational ministry role as an executive pastor serving under a long-term senior pastor. As my time serving there continued, I began to wonder what would happen to the church if the senior pastor resigned or retired. The church was heavily involved in world missions and was multi-cultural in its constituency. Would a new pastor come in and change the missional direction of the church? Would he have a heart to support and advocate for brothers and sisters sharing the gospel abroad? How would the congregation be affected by a new pastor with no prior knowledge of them or the church vision? These questions began a journey to help me better understand ways the COG could serve healthy churches led by long-term pastors.

I have found this journey could not possibly have been completed on my own. The faculty and staff at The Southern Baptist Theological Seminary have been tremendous, and I am particularly thankful for the wisdom and counsel offered by my supervising professor, Dr. Brian Richardson. I am also appreciative of Dr. Randy Stinson's work on behalf of this project. Likewise, Christopher Bosson, Angie Ward, and Tony Higgins have been helpful to suggest editorial, structural, and grammatical changes that have immensely improved this research. In addition, the "gang" of Cohort 03 have been like family—cheering one another to finish the race.

I would also like to express gratitude for the support of the leadership and staff

at Covenant Church in Charlottesville, Virginia, where I began this doctoral journey. The board, teachers, and staff at Christ’s Legacy Academy in Athens, Tennessee, have also offered support and prayers without which this work would not have been possible. In addition, the families of Cornerstone Family Church in Cleveland, Tennessee, where I currently pastor, have been prayerful and supportive as this pilgrimage has drawn to a close.

My wife, Nicole, and our children, Seth, Sophia, Elijah, and Ethan have willingly sacrificed as this journey has progressed. As I have spent time at my desk, my wife has managed the home and the children with excellence. She has assisted in myriad ways with the research, and I am grateful for her loving heart and sweet spirit. She is a virtuous woman whose value is “far above rubies” (Prov 31:10).

Above all, thank you to Jesus, who saved me from my sinfulness and the wrath to come through His gracious love and generous mercy. My prayer is that this work brings glory to Him and furthers the Gospel of His kingdom.

Robert Collison McCready

Cleveland, Tennessee

December 2011

## CHAPTER 1

### INTRODUCTION

You are carrying the baton in a very special relay race; . . . you have been given the privilege of carrying the baton of leadership. If you do a great job of carrying this baton, your organization may last long beyond your tenure. You have been given this extraordinary baton for only a short segment of your organization's life. At some point, you will need to hand it off to another leader who will take your place. You will be amazed at how quickly this time passes! Will you—and your successor—be ready for this handoff? (Goldsmith 2009, 3)

Should a church exist long enough, it will pass the leadership baton. Every pastor will eventually leave his congregation, whether because of retirement, reassignment, or eternal rest. Yet, surprisingly, there is often little effort in the local church to develop a viable succession planning process (Stepp 2005, 203; Russell and Bucher 2010, 49-50). One of the hallmarks of great leadership, however, is the ability to successfully replicate leadership skills in others (Sanders 2007, 137). Scripture encourages leaders to commit what they have learned to other faithful men who will in turn be able to teach others (2 Tim 2:2). Given this understanding, pastors must develop and equip the next generation of church leaders.

According to church leadership consultants Carolyn Weese and Russell Crabtree, developing a ministry succession plan and training program is in the best interest of the local church. Those in church ministry often neglect actively seeking and training a successor for the primary leader's role. For reasons that range from fear to low self-confidence to complacency, ministers often see planned ministry transition as negative and even unscriptural (Weese and Crabtree 2004, 14). As the current literature

points out, planned leadership succession is becoming a necessary process for both secular and sacred organizations (Thomas 2008, 1; Zhang and Rajagopalan 2004, 483).

### **Introduction to the Research Problem**

“One of the most critical questions facing leading organizations is how to develop the next generation of leaders. In order to stay . . . these organizations need to be proactive and prepared for future performance with a ‘ready-now’ workforce. They need to invest in their people through a systematic succession planning system” (Sobol, Harkins, and Conley 2007, 23). Thus, succession planning and management is best understood as “any effort designed to ensure the continued effective performance of an organization, division, department, or work group by making provision for the development, replacement, and strategic application of key people over time” (Rothwell 2005, 10).

Human resource strategist Deborah Demay shares that succession planning became a primary focus of corporations after World War II. The business community became concerned that there was not enough skilled talent to fill leadership openings in the corporate environment. Many CEOs were retiring or dying without successors in place to carry on the corporate vision (Demay 2008, 2). In response to these concerns, organizations began developing in-house leadership training programs and succession planning strategies. General Electric was at the forefront of this endeavor (Vivek 2008, 1-3; Drucker 1962, 57).

Just as the end of World War II brought significant personnel challenges to General Electric and other multi-national companies, current demographic shifts are presenting similar challenges to the American church. Kelly shares that Lifeway Research

found that only 17% of Southern Baptist pastors were aged 39 or younger, with 56% being over the age of 50. Other denominations are reporting similar demographics for their pastors (Kelly 2007). The need for development and retention of pastors in the local church is essential. It is surprising, then, that very little academic research has been directed toward the study of formal pastoral succession planning (May 2010, 7).

### ***The Local Church at Risk***

Succession planning is essential for churches as well. While churches have community roots, their impact through prayer, missions, and service ministries can be felt on a national and global scale. According to Weese and Crabtree, when a pastor steps down from leadership, it can stall the ministry efforts of the local body. Pastoral searches can take up to 18 months during which times ministries and attendance often decline (Weese and Crabtree 2004, 38-39). A new pastor that is called or appointed to a particular local church may seek to shift missional directions entirely. This approach requires a retraining of staff and lay leaders and take more time away from fulfilling the external goals of the church.

### **The Aging Pastorate**

There appear to be several reasons succession planning in sacred organizations is necessary. First, the American pastor is growing older and fewer individuals are seeking a traditional pastoral role (Anthony and Boersma 2007, 12). Bob Russell, former pastor at Southeast Christian Church in Louisville, Kentucky, states candidly that the number one reason churches should plan for succession is that “we are all going to die” (Russell and Bucher 2010, 42). With the United States population projected to increase by at least 30% in the next 40 years (Census.gov 2009) and senior pastors in the 18-39

year-old age bracket declining (Kelly 2007), the role of the senior pastor is at a precipitous juncture.

While the number of younger pastoral leaders is decreasing, those that are seeking to lead are finding placement difficult. The Church of God (Cleveland, Tennessee) indicates that “the generational gap is forcing our emerging leaders to wait for opportunities to lead, provide fresh ideas, and positively influence the church” (Church of God 2010, 9). Churches and church leaders have failed to plan adequately for a vacated pulpit (Weese and Crabtree 2004, 14-15). It has not been since the end of World War II when U. S. businesses were desperately seeking skilled executive leaders (Demay 2008, 2) that a specific workforce has faced the tenure challenges currently facing the American pastor.

### **Uncertainty of Life**

A second reason succession planning is needed in the church is the uncertainty of life. In late 2001, the terrorist attacks in New York, Pennsylvania, and Virginia saw personnel and entire corporate infrastructures destroyed (Seifert 2002, 225). According to William Rothwell, the threat of terrorism presented unique circumstances that required organizations to anticipate cataclysmic events that could destroy an entire workforce in a matter of minutes. Corporations began looking for methods to reestablish corporate information and personnel within twenty-four hours of a tragic event (Rothwell 2005, xvii).

Organizations must also be concerned about the phenomena of school, business, and church shootings. “In the last decade . . . 50 people were killed and 30 wounded in 35 church shootings” (Linthicum, 2009). In March of 2009, a twenty-seven-

year-old gunman killed Pastor Fred Winters during a Sunday morning service at First Baptist Church in Maryville, Illinois (CBS Interactive, Inc., 2009). Just a few years earlier in 2007, Matthew Murray began a shooting spree at New Life Church in Colorado Springs, Colorado. During Murray's rampage, a security guard shot and killed him on the church's property (FoxNews, 2007). The uncertainty of life and random violent events reinforce the need to plan for workforce continuity should church leadership be the target of fatal criminal activity.

### **Declining Denominational Uniformity**

According to Roozen and Neiman, in recent years, denominational churches are tending to focus more on community and less on their denomination. Parishioners could once move from town to town and attend the same denominational church and it would be similar in architecture, worship format, and doctrine. That is no longer the case (Roozen and Neiman 2005, 1-3).

While many churches may remain in a particular denomination, some are dropping denominational identifiers from their names. They often specify the direction of the local church based on community needs and congregational concerns. Slaughter and Bird suggest that denominational churches that are in different geographical locations and cultural contexts but have similar architecture, programming, and ministry emphases are a dying breed. "God's kingdom is not best represented by franchises of McChurch. If you focus your energies on copying someone else's methodologies or programs, you will miss something crucially important . . . . The Holy Spirit is empowering transformational leaders who demonstrate the kingdom of God in unique ways in each different community" (Slaughter and Bird 2001, 15).



Churches such as the ones Slaughter and Bird identify represent unique circumstances in unique communities. When the senior pastor retires or moves on, it can be challenging for these churches to find a leader who understands their unique context unless they are developed from within (Russell and Bucher 2010, 19-20) The continuity of the mission and vision of the local church often rests with the primary leader (Getz 2003, 193). A leadership succession plan allows a new leader to be thoughtfully chosen and prepared to bring continuity to the broad goals of the church.

### *Opportunity*

While the risks facing the pastorate should not be overstated, it should be understood that succession planning is not a one-size-fits-all option; church leaders ought to be realistic about the challenge of an empty pulpit. Aging pastors, the decline of those entering traditional ministry leadership, the threat of violence, and declining denominational loyalty all create upheaval in the church. Despite the fact that the short-term effects of a pastoral exit often cannot be mitigated, succession planning can help sustain the primary mission and vision of the church in the months and years after a pastoral vacancy (Weese and Crabtree 2004, 30-31).

According to academic researchers Zhang and Rajagopalan, the transition of the primary leader is one of the most crucial events in the life of any organization. From their research, they indicate that while there are many ways in which a viable succession plan can be accomplished, relay succession—a process of succession where the incumbent and successor run in tandem for a period of time—is perhaps the most formal process used in corporate America (Zhang and Rajagopalan 2004, 483; Vancil 1987, 20-21). They cite several theoretical benefits for utilizing relay succession: (1) Relay

succession can facilitate the power transition from incumbent to successor; (2) Relay succession offers the heir apparent on-the-job training; (3) Relay succession can signal stability within the organization; and (4) The presence of an heir apparent provides an immediate leader should something happen to the incumbent (Zhang and Rajagopalan 2004, 483). Despite these benefits that seem to be applicable to the local church, relay succession is an infrequent method of pastoral transition (May 2010, 125). Gentry, Hurst, and Shen indicate that “the process of relay succession is an important one for organizations,” and while “the relevance of the phenomena is clear . . . the process is not.” They further suggest “firms selecting CEOs through a relay succession will likely perform better during the post succession period than those who do not” (Gentry, Hurst, and Shen 2006, 112).

The precedent literature regarding relay succession in the local church is scant. Pastoral succession literature mainly focuses on two areas: pastoral transitions and leadership training. Several books and articles share thoughts about the pastor in transition. They are specifically aimed at helping an individual pastor make the transition from one church to the next. They are helpful, but provide very little information for the local church and local pastor who desire to train a successor and implement a succession plan (Weese and Crabtree 2004, xiii; Russell and Bucher 2010, 49).

Likewise, a significant literature base exists that discusses leadership training and mentoring. Many articles and books have been written to help pastors develop a leading perspective as it relates to training others. The literature gap lies between the two poles of pastoral transitions and leadership training. Succession planning in the local church must connect the reality that churches are individually unique and that the primary

leadership role will eventually transition from one person to another. The continuity of the local church mission rests in the ability to replicate a passion for the church's mission from one leader to the next. Pastoral relay succession is one tool that can be utilized to accomplish this task (Russell and Bucher 2010, 44-46).

### **Research Purpose**

The purpose of this study was to discover and articulate the process and principles of relay succession in the senior pastorate within the Church of God (COG) denomination headquartered in Cleveland, Tennessee. In order to build a foundation for future research, a qualitative, descriptive, multiple case study method was used. Through the examination of several best-case examples of relay succession, principles emerged that can assist the local church and pastor in directing a positive relay type succession event.

### **Research Questions**

1. What are the antecedents of a relay succession plan?
2. What is involved in the selection process of a new pastor in the context of a relay succession plan?
3. What is the process of implementing a relay succession plan?
4. How is the average weekly attendance and average weekly financial giving of a congregation affected in the context of a relay succession plan?

### **Delimitations of the Research**

Though there are many individuals who could contribute to this study, the intent is to focus on those who assist in forming, leading, and executing a relay type succession in the senior pastor position of the local church. Generally, these include the

incumbent pastor, the successor pastor, and, in some cases, the denominational government. This study examined only those churches that have experienced a relay type succession within the study period of 1994-2009 and had an average weekly attendance greater than 150 at the time of the succession event. Further, of those successions that took place, the successor must have served as the senior pastor following the succession for a period of not less than 2 years. Finally, the data analysis and categorization was delimited to classifications that focus on relay type succession within the senior pastorate.

### **Instrumentation**

For the purpose of this study, a case study protocol with an embedded semi-structured interview was used to assist the researcher in data gathering. The interview questions were formulated through the precedent literature review to assist in answering the research questions. Interviews previously designed for similar research were also consulted (Parker 2007; Park 2005; Harding 2008).

As the interviews for each case study were completed, they were transcribed and coded for content analysis by the researcher. Qualitative analysis software was used to assist in the data management process. To ensure reliability, an expert panel was consulted to review the interview questions before they were utilized in the case studies.

### **Terminology**

The following terms and definitions are offered to clarify their use in this study:

*Antecedents.* Antecedents are the processes and events that lead to a leadership transition (Giambatista, Rowe, and Riaz 2005, 967; May 2010, 11).

*Church.* For this study, the church will be defined as a “community of Christian believers associated for worship and service in a specific locality” (McKim 1996, 49).

*Church council.* According to the *Supplement to the Minutes of the Church of God*, the church council is elected by local church congregation and shall consist of loyal male members. The pastor serves as chairman of the church council and no meeting can be called without his permission. The responsibilities of the church council are to encourage spiritual growth, maintain financial integrity, and oversee the physical facilities of the local church (Black 2008, 169-71).

*Church of God (COG).* Church of God refers to a conservative, Protestant, evangelical denomination headquartered in Cleveland, Tennessee. It has a worldwide membership of over 6 million people with a presence in nearly 150 countries. The highest governing authority in the COG is the International General Assembly, which meets bi-annually and is comprised of all COG members over the age of 16 registered and present at the assembly meetings (Church of God 2008). The Church of God has a centralized form of church government. The International General Assembly “governs the operation (including ownership of all real and personal property) of the Church of God, Cleveland, Tennessee, USA, at all structural levels: international, national, state/territorial, district and local” (Black 2006, 160).

*Consequences.* Consequences are the processes and events that transpire after a leadership transition (Giambatista, Rowe, and Riaz 2005, 973; Zhang and Rajagopalan 2004, 487).

*Cross-case analysis.* Cross-case analysis is a technique specifically designed to analyze multiple cases. It “treats each individual case study as a separate study” (Yin 2009, 156). “Once the analysis of each case is completed, *cross-case analysis* begins. A qualitative, inductive, multicase study seeks to build abstractions across cases” (Merriam 2009, 204).

*Dimensions.* Dimensions are the components of succession. These components include, but is not limited to, the duration of the succession plan, stages of succession, and structure and conduct of succession systems (Kesner and Sebra 1994, 360).

*External succession.* External succession, also known as “outside succession,” takes place when an individual assumes the primary leadership role of a local organization and has not previously been employed or had a direct relationship with that organization (Zhang and Rajagopalan 2006, 97).

*Heir apparent.* An heir apparent is the planned successor to the primary leader of an organization. The heir is “elevated to a clear ‘number two’ position in the organizational hierarchy” (Schriesshem and Neider 2006, 106).

*Internal succession.* Internal succession, also known as “non-relay inside succession,” takes place when an individual assumes the primary leadership role of a local organization in which he or she was previously employed or had a direct relationship. These leaders are typically subjected to a “horse race” where several individuals within the organization battle for the same position (Zhang and Rajagopalan 2006, 97).

*Pastoral transition.* A pastoral transition takes place when a current pastor resigns, retires, or is removed from the pastorate and a new pastor is called or appointed to the senior leadership role in the church (Weese and Crabtree 2004, 141-43).

*Predecessor.* The predecessor is the incumbent pastor. While “every pastor is a departing pastor” (Weese and Crabtree 2004, 47), the predecessor is usually the pastor in office before the succession takes place.

*Relay succession.* Relay succession is the passage of the senior leadership role to an heir apparent. The passage of leadership from incumbent to successor is gradual; both run in tandem for some time (Friedman 1988, 251).

*Senior pastor.* The senior pastor is the principal spiritual leader of the local church with primary responsibilities to preach, teach, and administrate. The term usually indicates a multi-staff church (Anthony 2001b, 623).

*Senior Pastorate within the Church of God.* The term senior pastorate within the COG refers to the office of pastor in the local COG congregation. Moreover,

The Church of God believes that from within the priesthood of all believers God specifically selects, calls, anoints, and commissions certain individuals for extraordinary service and leadership and that this special (clergy) calling is of God’s sovereign will, characterized by individuals with spiritual passion, love for the lost, total involvement, lifelong sacrifice, and servant leadership rather than by those seeking position or personal honor. (Church of God 1996, 88)

*State overseer.* The state overseer is sometimes viewed in the COG as a pastor of pastors. He is appointed by an executive committee of the COG and can serve for a maximum of 12 years. The state overseer is called to “(1) arrange for and assist in conducting a general evangelistic campaign throughout his state or territory, (2) appoint district overseers [and] pastors, and (3) approve the setting in order of churches before organization is effective” (Black 2006, 147). While the state overseer has the authority to

appoint the local church pastor, “the approval of the appointment rests with the [local church] congregation” (Stone 2010, 1).

*Succession planning and management (SP&M).* This term identifies the “process that helps ensure the stability of the tenure of personnel. It is perhaps best understood as any effort designed to ensure the continued effective performance of an organization, division, department, or work group by making provision for the development, replacement, and strategic application of key people over time” (Rothwell 2005, 10).

*Successor.* The successor is the pastor that inherits the pastoral office of a local church from the predecessor (Weese and Crabtree 2004, 54).

### **Research Assumptions**

The assumptions underlying this study were as follows:

1. Case study research is a valid empirical inquiry in the social sciences “that investigates a contemporary phenomenon in depth and within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident” (Yin 2009, 18).
2. Church of God local, state and international offices maintain accurate and truthful records of church attendance and stewardship.
3. Incumbent pastors, successor pastors and state overseers are the most knowledgeable individuals of a church’s succession plan and are therefore the most appropriate persons to participate in the case study protocol.
4. Local churches maintain accurate and truthful records of board meetings, planning sessions and congregational meetings.

### **Procedural Overview**

The procedure to answer the research questions was conducted in three phases. In Phase 1, the relevant literature was reviewed and compiled to more fully understand



the development and deployment of a pastoral relay succession. During this phase, the researcher also selected four cases of relay succession within the COG to be studied. The selected churches had a pastoral relay succession during the study period of 1994-2009. The incumbent and successor pastors were available for interview. The final aspect of this phase was to design a data collection protocol with the assistance of an expert panel that would ensure the validity and reliability of the data collected.

Phase 2 of this study prepared, collected, and analyzed the data. Each study was conducted individually through the case study protocol developed in Phase 1. The case study questions embedded in the protocol assisted the researcher in data collection. As the data was collected, it was coded and categorized with the assistance of qualitative analysis software. When the data collection was completed at each research site, a report was compiled to assist in data comparison and analysis.

In Phase 3, the researcher initiated a cross-case analysis of the completed case studies. The goal was to “build a general explanation that fits each individual case” (Yin 2009, 142). A final analysis of findings was developed to answer the initial research questions.

## CHAPTER 2

### PRECEDENT LITERATURE

The precedent literature review examines biblical, historical, and theoretical concepts related to the research purpose of this study. The first section will review the biblical support for succession planning in ministry organizations. A summary of the historical and theoretical perspectives of succession planning will form the basis for section two. The third section will examine contemporary research on relay succession. The precedent literature review will conclude with a profile of the current study.

#### **A Biblical Foundation**

A discussion of church ministry and pastoral leadership will prove helpful to articulate the concept of relay succession in the local church. The following section will provide an overview of the mission of the church and then discuss the implications of pastoral leadership. This section will conclude with an investigation of several examples of relay succession as articulated in the Scriptures.

#### ***The Church***

Pastoral leadership occurs within the context of the local church. While the focus of this research is on the senior pastorate, the local church primarily experiences the long-term impact of relay succession (Weese and Crabtree 2004, 30). A biblical understanding of the church is necessary to further support this study.

## Definition

The New Testament describes the church as both a local body of believers (local church) and all those who have believed in Christ at all times and places (church universal) (Erikson 2006, 340; Schreiner 2008, 695). “To become a Christian is to enter into the community of faith and, along with other true believers, share in the life of this community, the church” (Arrington 1994, 165). The terminology used in Scripture to describe the church provides insight into its primary nature. The word most often translated “church” in the New Testament is *ekklesia*.

Yet the early believers did not coin the term. Instead, “church” (*ekklesia*) was a common word in the first-century Roman world. Arising from the verb “to call” (*kaleo*) plus the preposition “out of” (*ek*), *ekklesia* simply means “assembly.” More specifically, an *ekklesia* was a gathering of the citizens of a given community who had been called together to tend to city affairs. (Grenz 1996, 207)

The choice by New Testament writers to use the term *ekklesia* seems to signify the importance of personal relationships and fellowship within the Christian covenant community (Guthrie 1990, 506-07).

While the church is comprised of people from every “nation, tribe and tongue” (Rev 5:9), Getz suggests three biblical terms that are commonly used to describe individuals who make up the church:

1. *Disciples*. “The term ‘disciple’ literally means both ‘a learner’ and ‘a follower.’ In the book of Acts . . . they [disciples] were not just ‘learners’ and ‘followers,’ but believers who had been baptized by the Holy Spirit into the body of Jesus Christ. They were all born again Christians, though clearly at various levels of Christian maturity” (Getz 2003, 50).
2. *Brothers*. “Biblical authors used the term ‘brothers’ more frequently than any other word to refer to people who embodied the local church. Many times it is used to refer to both men and women who are believers in Jesus Christ—members of the family of God” (Getz 2003, 51).

3. *Saints*. “*Hagios* (‘saints’) is another word New Testament writers used frequently to describe born-again people in a local church. We are to become more and more conformed to the image of Christ, reflecting the fruit of the Holy (*hagios*) Spirit in all of our relationships with one another (Gal 5:16-26)” (Getz 2003, 52).

These terms define the church as a group of people unified with a common mission and purpose in Christ (Warren 1995, 87).

## **Biblical Nature**

Understanding the components of a biblical church will help form a clear understanding of biblical succession practices. Ed Stetzer, missiologist and director of Lifeway Research, describes six components that identify a biblical church:

1. *Scriptural Authority*. “In his itinerant ministry, Paul customarily began ministering in the synagogue, showing from the Scriptures that Jesus must be the Messiah (Acts 17:2-3). In 2 Timothy 3:15-17, Paul established for all time the authority of the Scriptures in the life of the church.”
2. *Biblical Leadership*. “The New Testament speaks of elders, bishops, pastors, deacons, evangelists, prophets, and apostles. These leaders all gave themselves to equipping the believers for ministry (Eph 4:11-12).”
3. *Preaching and Teaching*. “People need to hear, read, study, apply, and meditate on God’s Word (Rom 10:14; John 8:32; 2 Tim 2:15). The style and length of the sermon varies from culture to culture, but the preaching and teaching of God’s Word has to be a transcultural constant.”
4. *Ordinances*. “The church in Jerusalem devoted itself to the ‘breaking of bread and prayer’ (Acts 2:42). This references the Lord’s Supper. Jesus’ command to ‘do this in remembrance of me’ and the apostle Paul’s instructions in 1 Corinthians 11 show how important the Lord’s Supper was, and is, to the church. Jesus commissioned His disciples to baptize the nations, and the book of Acts and the epistles show that the early church faithfully baptized new believers (Acts 2:41).”
5. *Covenant Community*. “Biblically, the church is not comprised of some who are believers in covenant community and some who are not. The letter of James insists that all the believers be treated the same. As a covenant community, believers share . . . common ideals, as reflected in Acts 2:42-47.”
6. *Mission*. Churches are called to the mission of propagating the gospel. Scripture clearly and frequently teaches this. Jesus’ last words to His disciples, recorded in Acts and in each of the four Gospels, pertain to missions” (Stetzer 2007, 2-4).

Most of the components that Stetzer identifies set the local church apart from every other organization, both secular and sacred.

While the biblical components of the church are enduring, as churches minister in various cultures they must adapt to communicate the gospel with increasing relevance (Singh and Farr 2008, 2). Rainer suggests, “If the world does not understand the church, if the church is not relevant to the world, then the unchangeable message of the gospel is never communicated to the lost” (Rainer 1993, 186). This adaption process requires the church to be proactive in training and developing leaders who can hold fast to the unchangeable message yet communicate it with increasing relevance.

### ***Pastoral Leadership***

Titles and descriptions of church leaders vary in the New Testament. The presence of structured leadership, however, is evident in the first century church (Schreiner 2008, 735). A further examination of the pastor and his role in succession planning will be provided through an exploration of the Scriptures and contemporary biblical literature.

#### **Definition**

The Bible uses several different words to describe church leadership. James Stitzinger, associate professor of historical theology at The Master’s Seminary, identifies five biblical terms that are helpful to more fully understand church leadership. These terms are:

1. *Elder (presbuteros)*. One who administers and spiritual guides the church (Acts 15:6; 1 Tim 5:17; Jas 5:14; 1 Pet 5:1-4).
2. *Bishop or Overseer (episkopos)*. One who guides, oversees, and leads in the church (Acts 20:28; Phil 1:1; 1 Tim 3:2-5; Titus 1:7).

3. *Shepherd or Pastor (poimen)*. One who leads (Acts 20:28-31; Eph 4:11) as well as offers guidance and provision in the church (1 Pet 2:25; 5:2-3).
4. *Preacher (kerux)*. One who publicly proclaims the gospel and teaches the flock (Rom 10:14; 1 Tim 2:7; 2 Tim 1:11).
5. *Teacher (didaskalos)*. One who is responsible for the instruction and exposition of Scripture and whose teaching is both instructive (1 Tim 2:7) and corrective (1 Cor 12:28-29) (Stitzinger 1995, 39).

While the exact terminology varies in different scriptural passages, these meanings generally refer to a function of the pastoral role (MacArthur 1995, 39-41; Merkle 2007, 46).

Of the terms Stitzinger identifies, “overseer” (*episkopos*) and “elder” (*presbuteros*) seem to be most closely associated with formal pastoral leadership (Dever 2004, 228-31). In his letters to Timothy and Titus, Paul emphasizes teaching and leading as traits of the overseer (1 Tim 3:2; 1 Tim 4-5; Titus 1:9). Schreiner suggests that the terms “overseer” and “elder” refer to one whose function is to care for and guide local communities of believers through teaching and leading. The elder’s and overseer’s “primary calling is to pass on the tradition and truth of the gospel. . . . [They] exert their leadership through their teaching ministry, by their adherence to the gospel” (Schreiner 2008, 737-38).

Paul clarifies that the office of pastor is a spiritual gift. Ephesians 4:11-13 reads,

And He gave some as apostles, and some as prophets, and some as evangelists and some as pastors and teachers, for the equipping of the saints for the work of service, to the building up of the body of Christ; until we all attain to the unity of the faith, and of the knowledge of the Son of God, to a mature man, to the measure of the stature which belongs to the fullness of Christ.

Paul's emphasis is that the pastor has an essential role in strengthening and maturing the local body of Christ (Clinton 1989, 36; Schreiner 2008, 735-38). Part of this process is casting a long-term vision by leading a congregation to plan for future ministry endeavors (Blackaby and Blackaby 2002, 278; Park 2005, 16).

Contemporary definitions coupled with biblical terminology provide a foundation to understand better the role of the pastor in light of relay succession. Oden defines the pastor as "a member of the body of Christ who is called by God and the church and set apart by ordination representatively to proclaim the Word . . . and to guide and nurture the Christian community toward full response to God's self disclosure" (Oden 1983, 50). Bailey also gives a valuable definition, stating that the pastor is a member of the body of Christ and "is one of the gifted men the church needs for the equipping of the saints and for the building up of the body" (Bailey 1979, 20). Both definitions suggest that a portion of the pastoral role is to equip the congregation for ministry and adherence to gospel precepts both now and in the future.

Peter Wagner further suggests that the role of the pastor is an equipper of the congregation. He shares that the pastor should lead the congregation to set and accomplish goals. In addition, the pastor is to see that each member of the body is "properly motivated and equipped to do their part" in fulfilling the mission of the local church (Wagner 1984, 78-79). Along with the previous definitions, one should note that the pastor is forward thinking in terms of congregational leadership. The pastor not only tends to the immediate needs of his congregation, but he is also concerned about the ability of the congregation to minister in the future (Rainer 1993, 188).

## Spiritual Leadership

As the Scriptures and various authors have pointed out, pastors are responsible for leading a local congregation as they follow God’s will together. While principles of secular leadership may be helpful at times, the pastor’s leadership role is different from leadership in a secular context. In Table 1, Sanders identifies characteristics of natural leadership and spiritual leadership. Natural leadership rests in one’s own strengths and abilities. Spiritual leadership, conversely, seeks to be God-centered. This God-centered leadership is tangibly expressed through self-sacrifice, humility, and seeking “the mind of God” (Barna 1992, 68).

Table 1. Natural versus spiritual leadership

Natural Leadership	Spiritual Leadership
1. Self-confident	1. Confident in God
2. Knows men	2. Also knows God
3. Makes own decisions	3. Seeks God’s will
4. Ambitious	4. Humble
5. Creates methods	5. Follows God’s example
6. Enjoys command	6. Delights in obedience to God
7. Seeks personal reward	7. Loves God and others
8. Independent	8. Depends on God

Sanders’ schema is helpful to this study through its comparison of these two distinct, yet common methods of leading. In Christian leadership, ambition and motivation are fundamentally Christ-centered (Lawrence 1987, 328). Pastors who embrace and practice qualities of spiritual leadership tend to be more effective in their calling. In essence, “good pastors keep building up the Christian community, keep wondering what it takes for this conglomeration of individuals to become the Body of Christ” (Willimon 2002, 277).



Sanders's suggestion that natural leadership tends to be focused on one's own desires and ambitions and spiritual leadership tends to be focused on God's desires and ambitions is accurate. Godly pastoral leaders forsake personal legacy building in favor of building Christ's kingdom. In reflecting on his pastorate at Fellowship Community Church, Getz states, "When my ego needs are more important than the needs of the people in the church, I have stepped over the line and I'm reflecting carnality rather than spirituality" (Getz 2003, 324).

One final aspect of the spiritual leadership of the pastor is found in his willingness to prepare for and pass leadership to the next generation. Russell states, "The five years I spent with the Elder Board carefully planning and executing the [pastoral] transition process were some of the most important years of my ministry" (Russell and Bucher 2010, 53). In addition, Weese and Crabtree suggest that

a leader following Jesus is called to articulate a vision for how the Body can thrive in and through a leadership transition. Anything less is a failure of leadership. The leader must be able to imagine a way to unfold a leadership transition that increases maturity, deepens capacity, and fosters abundance." (Weese and Crabtree 2004, 22-23)

Passing leadership to the next generation of pastoral leaders is crucial to the mission and purpose of the local church (2 Tim 2:2).

As the above definitions point out, the pastoral office seeks first to provide physical and spiritual care for the local congregation while also helping to move the church closer to its future destiny. Second, the Paul indicates that the office of pastor is a spiritual gift. His letter to the Ephesian church encourages those with the spiritual gift of pastoring to fulfill their calling through their work in the church. Third, the pastor is uniquely charged with seeking God to help create an environment of growth and learning

whereby parishioners can fulfill their calling and destiny in Christ (Dever 2004, 205-06). Finally, as a spiritual leader, the pastor is responsible to position the church for success even after his departure. One of the most important aspects of pastoral ministry is passing the baton of church leadership to the next generation (Russell and Bucher 2010, 53; 62-63).

### ***Biblical Examples of Ministry Succession***

God's design to accomplish his kingdom work includes transferring leadership to successive generations of new leaders (Blackaby and Blackaby 2002, 278). Several instances in the Bible illustrate this point: Moses' transition to Joshua (Josh 1:1-18), Eli's transition to Samuel (1 Sam 3:1-21; 7:15-17), and Elijah's transition to Elisha (1 Kgs 19:15-16; 2 Kgs 2:15-25). While this list is not exhaustive, it does suggest a precedent in the Scriptures for planned leadership succession. An overview of these examples will help further build a foundation for understanding relay succession in the local church.

#### **Moses and Joshua**

According to Kenneth Gangel, Moses is seen as the quintessential leader in the Old Testament. Jews and Christians alike revere him for leading the people of God out of Egypt and preparing them to enter Canaan. The relationship of Moses and Joshua provides a prototype for biblical leaders (Gangel 1989, 17). While his life and leadership skills were not without disappointment (Num 20:1-13), his deep connection with God provided a sense of balance and direction as God fulfilled his promise to the patriarch Abraham through the nation of Israel (Gen 12:1-3; Exod 12:29-41; Gal 3:29).

### ***God Calls Joshua***

As successor to Moses, Joshua had been with the Israelites since they fled Egypt and entered the wilderness. He was one of two spies who entered the Promised Land and returned with a favorable report (Num 13:1-33). Additionally, he was with Moses throughout the forty years of desert wanderings and eventually led the people to the Promised Land while achieving military, organizational, and political success along the way (Exod 32:15-35). Although Moses was one of the greatest leaders in historical Judaism, God called Joshua to lead his people to their promised destiny (Num 27:15-23; Deut 31:7-8; Joshua 1).

### ***Period of Transition***

The succession of leadership from Moses to Joshua seems to be planned and well organized (Hess 1996, 21-22). While the Scriptures do not explicitly state what these men of faith knew about their ultimate role, Moses clearly felt the need to prepare Joshua for leadership (Haubert and Clinton 1990, 35). The battle with Amalek in Exodus 17 begins the training of Joshua as a military leader. Moses commands him to choose his warriors and defeat the enemy. After the battle is won, God speaks to Moses: "Write this in a book as a memorial and recite it to Joshua" (Exod 17:14).

Later, as Moses climbs to the top of Mount Sinai (Exod 24:12) and speaks to God at the tent of meeting (Exod 33:8-11), Joshua is at his side. It is through these events that Joshua was immersed in the spiritual tenets of leadership (Merrill 2006, 414-15). When Moses passes the baton of leadership to Joshua, he does so before the entire congregation of Israel. Numbers 27:18 reads,

So the LORD said to Moses, "Take Joshua the son of Nun, a man in whom is the Spirit, and lay your hand on him; and have him stand before Eleazar the priest and

before all the congregation, and commission him in their sight. You shall put some of your authority on him, in order that all the congregation of the sons of Israel may obey him.”

This visible proclamation of Joshua as the new heir apparent was essential to the Israelite’s eventual journey into the Promised Land.

### ***Joshua Succeeds Moses***

Moses’ leadership of the Israelites lasted approximately forty years. But, because of his disobedience (Num 20:1-13), Moses was forbidden to lead the people into the Promised Land (Deut 3:23-28). God’s choice of Joshua to succeed Moses marks the beginning of the fulfillment of the Israelite’s destiny. The Scriptures state, “Now it came about after the death of Moses the servant of the LORD, that the LORD spoke to Joshua the son of Nun, Moses' servant, saying, Moses My servant is dead; now therefore arise, cross this Jordan, you and all this people, to the land which I am giving to them, to the sons of Israel” (Josh 1:1-2).

This inspection of the succession from Moses to Joshua has provided several insights that are helpful to the study of relay succession. First, God calls new leaders. It was God, not Moses, who called Joshua to become a leader. Second, God prepares successors. There was a definitive preparation period for Joshua before he became the formal leader of Israel. Finally, once leadership transfers from the incumbent to the successor, the incumbent ceases to lead the organization. Joshua began leading Israel immediately after Moses died. Since God is sovereign over life and death (1 Sam 2:6; Ps 139:16; Heb 9:27), it was God’s choice for Moses’ death to occur at the moment of transition.

## **Eli and Samuel**

The succession from Eli to Samuel continues to provide insight into God's plan for leadership transitions. The Lord's rejection of Eli and his sons and subsequent acceptance of Samuel as a "faithful priest" (1 Sam 2:35), shows God's interest and initiative in the leadership of his people. This succession takes place at a pivotal moment in Israel's history (Baylis 1996, 191).

### ***God Calls Samuel***

Eli was the High Priest and Judge of Israel who served at Shiloh for approximately forty years (1 Sam 1:3-9). During his time of service, a man named Elkanah would come annually and worship with his wives and children (1 Sam 1:1-3). One of his wives, Hannah, was barren and diligently prayed that God would bless her with a child (1 Sam 1:11-17). God answered her prayer and gave her a son, Samuel, whom she dedicated to the service of the Lord (1 Sam 1:20-2:11). Eli's sons were unfit to continue the priestly lineage (1 Sam 2:12-17), so God chose Samuel as Eli's successor (1 Sam 3:1-21). "Samuel's national stature as a recognized prophet [sustains] the presence of God in Israel and the faith of the remnant" (Waltke 2007, 630).

### ***Period of Transition***

The transition from Eli to Samuel was a turbulent period in Israel's history (Merrill 2006, 434). From the time that he was a very young boy until Eli's death, Samuel served with Eli in the priesthood (1 Sam 2:18-21; 3:18-21). As judgment for the unrighteousness of Israel as well as that of Eli and his sons, God allowed the Philistines to defeat Israel at the battle of Aphek (1 Sam 4:1-11). There the Philistines captured the Ark of the Covenant and killed many, including Eli's sons, Hophni and Phineas (1 Sam

4:11). When Eli, who had been sitting by the road, heard that the Ark had been captured, “[he] fell off the seat backward beside the gate, and his neck was broken and he died, for he was old and heavy. Thus he judged Israel forty years” (1 Sam 4:18). The leadership of the nation of Israel transitioned to Samuel upon the death of Eli (Wood 1986, 193).

### ***Samuel Succeeds Eli***

Samuel was a very significant figure in the history of Israel. “He was the founder of institutional prophetism, an office . . . whose task was to speak on God’s behalf against the deviations and excesses of Israel’s kings as well as to offer messages of judgment and hope to the nation as a whole” (Merrill 2006, 427). Approximately twenty years after Samuel becomes the “priest-leader” of Israel, the Ark of the Covenant is returned to the Israelites symbolizing the return of God’s favor (Waltke 2007, 632). Samuel’s ministry leads the nation from the period of the judges to the anointing of Saul as Israel’s king (1 Sam 10:1-9). When Saul disobeys God’s command (1 Sam 15:1-9), Samuel subsequently rebukes him (1 Sam 15:10-35) and anoints David as Israel’s new king (1 Sam 16:12-23).

The transition from Eli to Samuel further advances several concepts of the biblical pattern of succession. First, Samuel was clearly chosen by God to succeed Eli. God audibly spoke to Samuel that Eli’s house would be judged and Samuel would become the spiritual leader of Israel (1 Sam 3:1-21). Second, Samuel had a period of training under the tutelage of Eli (1 Sam 2:18-21; 3:1-21). As a young boy, Samuel certainly learned the logistics of the priesthood from Eli, yet even in the midst of corruption he served the Lord faithfully (1 Sam 2:18-21). Finally, Samuel’s leadership

did not officially begin until Eli's death (1 Sam 4:18; 7:15-17). As with Moses and Joshua, the incumbent (Eli) ceased to lead when the successor (Samuel) took his place.

### **Elijah and Elisha**

A third example of relay succession in the Bible is found in the story of Elijah and Elisha. Elijah, a prophet to the northern kingdom of Israel, existed during the reign of Ahab and provided prophetic leadership at a time when many Israelites were turning their hearts toward pagan rituals and gods. He showed God's power through miraculous signs and wonders (1 Kgs 17:17-24; 1 Kgs 18:20-46), pronounced judgment upon unruly royalty (1 Kgs 21:17-29; 2 Kgs 1:1-17), and anointed new kings in both Israel and Syria (1 Kgs 19:15-18). Like Moses, Elijah was not without his share of shortcomings. After seeing God's miraculous answer to his prayer by fire on Mount Carmel, Elijah descended into fear of the Israelite's queen Jezebel (1 Kgs 19:4-18). God's favor, nonetheless, was with him throughout his ministry. Nearing the end of his life on earth, he was "caught up" in a chariot to heaven and never died (2 Kgs 2:1-14).

### ***God Calls Elisha***

Elijah's successor, Elisha, was chosen as he was out plowing with twelve yoke of oxen (1 Kgs 19:19). The biblical narrative of Elijah and Elisha clearly suggests that God called Elisha to succeed Elijah (Provan 1995, 172). "The Lord said to [Elijah], 'Go, return on your way to the wilderness of Damascus, and when you have arrived, you shall anoint Hazael king over Aram; and Jehu the son of Nimshi you shall anoint king over Israel; and Elisha the son of Shaphat of Abel-meholah you shall anoint as prophet in your place'" (1 Kgs 19:15-18).

### ***Period of Transition***

During the time of leadership transition from Elisha's calling until Elijah was "caught up" to heaven, Elisha was Elijah's attendant (1 Kgs 19:21; 2 Kgs 3:11). Scripture is not clear how long this transition took. Before Elijah was taken up by a whirlwind, he offered to perform some act of service for Elisha. When asked what he would like, Elisha replied, "Please, let a double portion of your spirit be upon me" (2 Kgs 2:9). Elisha's desire reflects a genuine servant relationship and is the ultimate expression of his desire to follow and serve Elijah (Patterson 2005, 2). As was the custom, Elisha mourned when Elijah died, tearing his clothes in grief (2 Kgs 2:12).

### ***Elisha Succeeds Elijah***

The actual succession of leadership from Elijah to Elisha is one of the most unique events in the Old Testament. Apparently there was notice that Elijah would not leave the earth through traditional means (2 Kgs 2:1-3). Elisha followed Elijah through Jericho and they crossed the Jordan River through a miraculous parting of the waters (2 Kgs 2:5-8). "As they were going along and talking, behold, there appeared a chariot of fire and horses of fire which separated the two of them. And Elijah went up by a whirlwind to heaven" (2 Kgs 2:11).

The mantle of Elijah fell to Elisha as a symbolic transfer of the prophetic office. "He is consequently able to repeat Elijah's parting of the waters, proving himself to be Joshua to Elijah's Moses . . . . It is significant here that the names of Elisha and Joshua are so similar in meaning ('God Saves'; 'The Lord saves'). We are meant to read one story against the background of the other" (Provan 1995, 173).



The transition of leadership from Elijah to Elisha provides significant insight into the biblical model of relay succession. First, like Joshua and Samuel, Elisha was called by God to succeed Elijah. God spoke to Elijah that Elisha was to be anointed as a prophet to take Elijah's place. Second, the transition from Elijah to Elisha was not instantaneous; rather, Elisha served Elijah for some time before the actual leadership transition took place. Finally, the succession was complete once Elijah was removed from his office. Even though Elijah's disappearance from the earth was a very unique circumstance, Elisha did not assume Elijah's role until after Elijah was gone (2 Kgs 2:15).

The biblical overview has indicated several key factors that relate to relay succession. First, the local church is the organization through which believers participate in the plan of God on earth (Morris 1986, 35-36). God's plan, actuated through the mission and activity of the church, continues from generation to generation (Matt 16:18; Eph 3:21). In each generation, God provides spiritual gifts to individuals in the body of Christ in order to insure continuity of leadership and therefore continuity of church mission (Rom 12:6-8; Eph 4:11; 1 Cor 12:1-4).

Second, God has provided spiritual leadership to guide the local church. Pastors, as the church's primary leaders, give voice to God's vision (Dever 2004, 230-31). As men who care for the congregation, they are uniquely charged with helping the congregation fulfill God's plan even after the incumbent pastor departs (Russell and Bucher 2010, 62-63).

The biblical examples of relay succession offer several fundamental principles applicable to this study. First, God is in charge of the succession process. Moses and

Elijah were commanded by God to choose Joshua and Elisha as their successors. God audibly spoke to Samuel about the impending judgment of Israel that would elevate him to a leadership role. Incumbent leaders are charged with the task of looking for and equipping potential emerging leaders as well as seeking God's wisdom to select the right leaders for available opportunities (Rom 13:1-3).

Second, the Bible indicates that there is a definite transition period between the incumbent and successor. Moses knew that he would not enter the Promised Land, and yet Joshua continued to be at his side until Moses' death. Samuel served in the priesthood under Eli during his youth. Likewise, Elisha followed Elijah for a period of time until Elijah's final departure. While the Bible is not entirely clear on what happened during these transition periods, Joshua, Samuel, and Elisha certainly would have observed their leaders and learned valuable lessons from them.

Finally, the biblical pattern suggests that it is necessary for current leaders to willingly share responsibility with emerging leaders (Beery 2009). It emphasizes further that leaders must be personally mentored and publicly empowered. Joshua and Elijah were passed the torch of ministry from great men of faith. Samuel received the leadership baton through God's judgment of his predecessor, Eli. Though each transition was unique, these men were given a great opportunity to grow God's kingdom during transitional timeframes of biblical history.

### **Historical and Theoretical Foundations**

Although not all successions in the Bible were positive, they are helpful to understand how God works through leadership transitions. Similarly, this study benefited from an examination of the history and early theory building in the discipline of

leadership succession. This section of the literature review will begin by providing a synopsis of the work of early pioneers in the field of corporate succession, including some of the theories developed by Henri Fayol, Oscar Grusky and Walter Mahler. It will then examine General Electric's contribution to the field of succession followed by a summary of the various types of succession. Next, the researcher will provide an overview of recent dissertations that have made contributions to the literature base. Finally, this section will conclude with a detailed description of relay succession highlighting the benefits of its use as a means of leadership transition.

### *Henri Fayol*

One of the first practitioners to recognize the need for succession planning was the French engineer Henri Fayol (Drucker 1998, 153). At the turn of the twentieth century, Fayol was managing director of the mining conglomerate Compagnie de Commentry-Fourchambeau-Decazeville. He devised fourteen points of management that included stability of tenure of personnel. Fayol thought that if companies disregarded the need to provide for a trained and stable workforce "key positions would end up being filled by ill-prepared people" (Rothwell 2005, 10). Fayol's notions of leadership development would have little impact outside France until the late 1930s when his work, *General and Industrial Management*, was translated into English. As his influence spread, he became known as the father of the administrative school of management (Hindle 2009; Drucker 1998, 153). Although Fayol understood the need to plan for workforce development, succession planning was not a significant influence until later in the twentieth century.

## *Oscar Grusky*

Those who research succession planning seek to answer the question: Does leadership matter? (Canella and Rowe 1995, 86; Waldman et al. 2001, 134). In addressing this topic, the early pattern and scope of research into succession planning developed three main theories: (1) vicious-circle theory, (2) common-sense theory, and (3) ritual scapegoating theory. These theories, discussed below, were largely the work of Oscar Grusky's study of managerial changes in professional baseball teams (Kesner and Sehora 1994, 330).

### **Theory Building**

The actual time frame for initial scholarly inquiry into succession planning is debatable. Most recognize Grusky's work published in 1960 as the first attempt at academic research and theory development of succession planning (Giambatista, Rowe, and Riaz 2005, 964; Rowe et al. 2005, 199). As research into succession planning was in its infancy, most scholars viewed succession as a "disruptive event that depressed organizational performance" (Pfeffer and Davis-Blake 1986, 73).

Early researchers (Grusky 1963; Gamson and Scotch 1964; Grusky 1964a; Allen, Panian, and Lotz 1979) used sports teams as a means to study leader succession. Most organizations vary in size, philosophy, and organizational structure. Professional sports teams, however, have the advantage of being "highly comparable" and provide "measures of organizational performance on an annual basis over a relatively long period of time" (Allen, Panian, and Lotz 1979, 167-68). Future researchers went on to study organizations in different fields, but the basis for "the well-known 'three theories' of

succession and performance” (Giambatista, Rowe and Riaz 2005, 964) was established using sports teams.

### ***Vicious-Circle Theory***

Grusky reported on research he had completed after studying manager transitions occurring in major-league baseball teams. He developed a “vicious-circle theory,”

which portrays succession as a naturally disruptive and destabilizing force in organizations. According to this theory, succession is disruptive because it leads to new policies, it shakes up traditional practices, and it changes the formal and informal relationships among organization members. Although Grusky acknowledged that there may be some positive outcomes associated with the disruptiveness of succession, such as the introduction of new ideas, his vicious-circle theory implies that the resulting conflict and lower member morale will lead to a reduction in organizational cohesiveness and effectiveness, and ultimately to further succession. (Rowe et al. 2005, 199)

Grusky also noted the differences between choosing a successor who was chosen from inside a particular baseball club and one who was chosen from the outside. He states, “Inside successors tend to be less disruptive than outside successors, and mid-season successions in baseball frequently tend to involve inside replacements” (Grusky 1964a, 74). Some scholars argue that while common sense would suggest that replacing managers of teams that perform poorly should result in increased performance, there is almost no empirical evidence to support this conclusion. In fact, almost all evidence in the 1960s suggested that manager replacement would adhere to Grusky’s vicious-circle theory (Pfeffer and Davis-Blake 1986, 74). In addition, Grusky concluded that “the less prosperous an organization [had] been in the past, the greater are the forces on the organization to replace key personnel after succession” (Helmich 1975, 438).

### ***Common-Sense Theory***

Through further study of baseball organizations, Grusky developed the common-sense theory of succession (Grusky 1963, 25). This theory suggests that “performance [improves] following succession. In other words, when replacing a CEO, decision-makers would choose someone with the expertise and experience to enhance firm performance” (Kesner and Seboria 1994, 331).

Subsequent research has suggested little support for the common-sense theory (Rowe et al., 2005, 201). Allen, Panian, and Lotz, in their attempt to further Grusky’s research on baseball teams, found that succession of field managers did result in improved performance but only when the succession took place between playing seasons (Allen, Panain, and Lotz 1979, 177-79).

### ***Ritual Scapegoating Theory***

Gamson and Scotch sought to challenge Grusky’s research by examining mid-season field managerial changes from 1954-1961. They concluded that there are several other factors that are of more importance to overall team success than the role of the field manager. Their research suggested that field managers had very little impact on long-term team performance.

To account for the high correlation Grusky saw in managerial changes and team performance, Gamson and Scotch developed a third theory of succession called “ritual scapegoating” (Gamson and Scotch 1964, 70). Ritual scapegoating is “a convenient, anxiety-reducing act which the participants in the ceremony regard as a way of improving performance, even though (as some participants may themselves admit in

less stressful moments) real improvement can only come through long-range organizational decisions” (Gamson and Scotch 1964, 70).

### ***Walter Mahler***

Walter Mahler was a 1970s management consultant who focused on personnel and administrative issues for major multi-national corporations. His book, *Executive Continuity*, shared the succession practices of General Electric, Exxon, and several other organizations that were known as academy companies. These organizations used the corporate environment to create leadership talent pools to fill vacancies in top posts (Kesler 2002, 1). In *Executive Continuity*, he explained that one of the most pressing issues facing organizations is the need to train replacements within the organization. He was particularly concerned with the lack of internal candidates in most organizations for the CEO position. He articulated a systems approach—training personnel at all levels with the skills necessary for the position above them—to achieving continuity in executive positions that he felt was necessary because of the complex nature of the succession objectives (Mahler and Wrightnour 1973, 5-7).

In some respects, Mahler was ahead of his time. He was one of the first scholars to share the need for early identification of leaders in the succession planning process (Lafley 1987, 129). He challenged the common thinking of his day that suggested firms should look for replacements to top executives only when a vacancy occurred. Malher suggested that organizations should evaluate their youngest employees’s skills and qualifications to determine a potential fit for future executive vacancies. Additionally, he proposed that those who were identified should be trained in company dynamics and coached by those above them. He felt that direct involvement

and support of top management for a succession planning process was essential (Mahler and Wrightnour 1973, 82, 110-82, 120).

### ***General Electric***

General Electric (GE) was at the forefront of leadership development and succession planning in the 1950s and 1960s. Crotonville, GE's leadership training school, was used as a center for training in the technical aspects of GE's management system. According to Jack Welch, by 1980, the facilities had become outdated and leadership offerings quite static. Top-level leadership rarely attended meetings at Crotonville. When Reginald Jones, CEO from 1972 to 1981 selected seven individuals as his pool of potential successors, only two had participated in the general management course offered at Crotonville (Welch 2003, 170).

In 1981, when Jack Welch became CEO of GE, one of his first initiatives was to remake Crotonville both physically and academically. With board approval, he spent \$46 million renovating existing facilities and building new ones. The core emphasis of the center was leadership development rather than training related to specific functions. Jim Baughman, a former Harvard Business School professor and head of the management development center at Crotonville, was charged with initiating the new changes (Welch 2003, 169-73).

Later, University of Michigan management professor Noel Tichy was hired to replace Baughman and introduced the concept of action learning. Action learning educated top executives on business issues that GE was facing in key countries or businesses. Students at Crotonville became consultants to top executives in the organization producing tangible results in every class (Welch 2003, 174).



By the mid-1990s, 85% of the faculty at Crotonville were GE executives. Synergy and commonality of purpose were produced through the interaction of the top executives and senior managers. Crotonville allowed leaders to train leaders in order to have a ready pool of individuals to fill any position in the organization (Welch 2003, 176). GE also opened Crotonville's course offerings to GE corporate customers, infusing a lasting influence on the leadership culture of major corporations around the world (Vivek 2008, 1).

Crotonville, which has been renamed the John F. Welch Leadership Center, is currently headed by Susan Peters, GE's chief learning officer and vice president for executive development. "The 30-year GE veteran's role as the head of Crotonville means she is not only responsible for leadership running all the time, but for HR reviews and succession planning at every level, right from the very top" (Vivek 2008, 1). "Today we have leadership alternatives to almost 600 of the most important positions in the organization. There are candidates who we've identified to even assume the top job tomorrow in case of an emergency,' says Peters" (Vivek 2008, 1).

### ***Recent Developments***

In the last few decades, the field of research into succession has expanded modestly (Giambatista, Rowe, and Riaz 2005, 963). Many developments will be discussed in the following sections of this literature review. In the church, pastoral succession has drawn increased interest since the early 1990s when the failed transition from W. A. Criswell to Joel Gregory at First Baptist Church, Dallas, Texas, resulted in a terrible "rift and church embarrassment" (Russell and Bucher 2010, 17). More recently, Bob Russell's successful transition from the helm at Southeast Christian Church in

Louisville, Kentucky, has been the subject of articles in *Preaching, Christianity Today,* and *Leadership Journal*.

### **Recent Dissertations**

There have been a few recent dissertations that have impacted the study of succession in the local church. In 2000, Owens examined leadership change in the Church of God in Christ's (COGIC) denominational hierarchy from the founding leader to his successor. In this descriptive case study, he found "routinization of charisma and the evolution of leadership styles and organizational types" were inherent in the succession from the founder to the successor. He rightly titled his work *The Dark Years* due to challenges that faced the successor in legitimizing authority.

Park studied pastoral leadership succession in three Presbyterian Church of Korea churches in his 2005 dissertation. He found that the study churches were at a precipitous juncture because the current generation of church leaders were aging and a new generation was not being trained to replace them. He states that all Korean churches should invest in pastoral leadership succession in order to refocus the attention on the church mission. Further, he concludes that, "the next generation of pastors must improve their leadership by learning their predecessors' assets and overcoming their weaknesses in order for the Korean Church to reach maturity and long-term growth (Park 2005, 269-70).

In 2008, Wheeler studied succession dynamics in megachurches. Describing the importance of his study, he states,

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 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).

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 3 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 2008, 311-19).

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 (May 2010, 120). In addition, he found 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” (May 2010, 115). He explained that “the refinement of the intentional interim process and greater use of inside and relay succession could present opportunities for improved post-succession performance” (May 2010, 120).

The contributions of Fayol, Grusky, Mahler, and others to the field of succession planning are significant. Fayol first identified the need to provide for a stable workforce. His writings prodded organizations to plan for long-term viability through workforce structure and management. The later work of Oscar Grusky helped form a basis for future scholarly research. His theories on succession gave future researchers the opportunity to replicate his research in other studies thus expanding the knowledge of the

field. Mahler, likewise, influenced executive leaders to plan for their eventual departure through training and development of subordinates. In addition, General Electric was the first major company to implement a comprehensive program and structure to provide for executive succession. Finally, doctoral students have examined failed denominational successions, succession in megachurches and various succession types. The many influences in the history of succession planning have produced a field that is rich in knowledge, yet slim in practical application (Kesner and Sebora 1994, 327, 366).

### **Research Framework**

The pioneering work of early theorists “set the agenda for how researchers approached the topic [of succession] over the succeeding decades” (Kesner and Sebora 1994, 327). From their studies, a framework evolved that sought to delineate succession planning into four main areas: (1) succession antecedents, (2) successor origin, (3) succession contingencies, and (4) succession consequences. This paradigm formed the foundation for subsequent research on succession planning (Kesner and Sebora 1994, 330; Giambatista, Rowe, and Riaz 2005, 966).

### ***Succession Antecedents***

Succession antecedents examine the circumstances that cause a succession to take place. Researchers have examined antecedents such as board-related issues, firm performance, and CEO leadership characteristics (Giambatista, Rowe, and Riaz 2005, 967-73). While succession antecedents are often unique to a specific organization, several merit discussion. Incumbent tenure, organizational performance, organizational politics, and the study of the heir apparent are the three areas that have received the most attention.

## **Incumbent Tenure**

The reason an incumbent's tenure comes to a close can impact the success of a succession plan. Friedman and Saul describe why an incumbent might leave an organization. They explain,

To understand the consequences of succession events, an investigator must know the social forces that precipitate them. The force that impels a CEO to depart influences the extent to which the new CEO has discretion in affecting organizational outcomes, and it reflects the political process by which he or she is chosen. The initiating force indicated who controls the event. Our argument, based in part on our field research, is that four possible initiating forces can impel CEO successions in large corporations: (1) custom, or retirement following a pre-established rule, agreement, or custom; (2) board-initiation, or removal on behalf of shareholders; (3) initiation by a departing CEO, or early retirement; and (4) the death or health related disability of a CEO, events that strike randomly. (Friedman and Saul 1989, 723).

While these reasons may differ slightly in the local church, the consequences of the pastor's exit is just as significant as those of CEOs in the corporate world (May 2010, 47).

## **Organizational Performance**

Dalton and Kesner examined corporate performance as an indicator of inside and outside successions. They found there was no correlation between poor firm performance and outside succession. There was also no correlation between healthy firm performance and outside succession. They did find, however, that average performing firms were more likely to choose outside successors than were those companies at the extremes of the performance spectrum (Dalton and Kesner 1985, 759).

Rowe examined the performance of National Hockey League teams that experienced managerial changes in both the off-season and mid-season over a 60-year period. His research found that teams that changed managers in the off-season performed

better than those who changed managers mid-season (Rowe et al. 2005, 197). His findings suggest that “new leaders need time to accumulate organization-specific knowledge before they can take actions that will positively affect performance (Rowe et al. 2005, 202).

### **Organizational Politics**

Ocasio studied Gentry, Hurst, and Shen’s work, *Political Dynamics and the Circulation of Power*. He examined CEO succession practices in industrial corporations headquartered in the United States. Ocasio theorized that political dynamics in a particular corporation might account for executive turnover. He built his hypothesis on the notion of circulation of power, which emphasizes the “internal contests for control and opposition to the CEO that emerge with increased executive tenure and under conditions of economic adversity” (Ocasio 1994, 285).

Ocasio’s research concluded that “for the average CEO in the sample, it takes over a decade for legitimacy of his power to decrease the potential of rival political coalitions to emerge” (Ocasio 1994, 308). Ocasio observes that CEO performance has a very small effect on the rate of succession. CEOs are at risk of being dismissed by the board under certain identifiable political circumstances. If the CEO is still in his first decade of power, political contingencies may present themselves in cases of poor performance that call for his removal. If he has already legitimized his power, however, it is usually the poor economic performance of the firm and not CEO performance that increases the rate of succession (Ocasio 1994, 309).

According to Joel Gregory, W. A. Criswell had legitimized his power at First Baptist Church, Dallas, Texas over the course of almost five decades as pastor. Even

though there was internal turmoil in the church and its ministries, Criswell was able to maintain power through maximizing political forces even after hiring a successor (Gregory 1994, 215-16; 261-68). “Insiders are quick to point out that there are two sides to the story [of First Baptist, Dallas] and Gregory made some serious mistakes . . . . [B]ut the point here is that once you make the decision to take a step as serious as transitioning your leadership position to someone else, you need to throw everything you are into the process” (Russell and Bucher 2010, 95).

Ocasio notes that experienced leaders who have solidified legitimacy are able to weather the threat of dismissal, whereas those who have not legitimized power experience a greater threat (Ocasio 1994, 309-10). In order to overcome political forces, church leaders should exemplify the character and attitudes of Christ. Russell indicates that “the character of the persons involved in the transition is much more important than the timing or the strategy” (Russell and Bucher 2010, 58).

### **Heir Apparent**

Some studies suggest that the presence of an heir apparent within the organization increases the likelihood of a succession. Vancil, the first to coin the term “relay succession,” notes that “in CEO succession, the race is perpetual, limited only by the survival of the corporation. Each CEO runs only one lap . . . . A good CEO tries to plan for two laps beyond his own. The next lap will be run by his successor, but he also attempts to develop a strong set of ‘comers’ who can qualify to run the lap after that” (Vancil 1987b, 264).

Many heir apparents are developed for the CEO position, yet for various reasons fail to eventually assume the role. The case of Jimmy Draper and Joel Gregory at

First Baptist Church, Dallas is an apt illustration of this point. Both men were hired at First Baptist to succeed W. A. Criswell. However, since no definite departure date and no clear plan for succession existed, it ended in a failed attempt at relay succession (Russell and Bucher 2010, 17). Cannella and Shen suggest that an heir apparent who has acquired firm-specific skills is more likely to stay with an organization rather than seek employment outside the firm (Cannella and Shen 2001, 265-67). Zhang and Rajagopalan agree, noting that the presence of an heir apparent makes intra-firm succession more likely (Zhang and Rajagopalan 2003, 327-38).

Anticipating his own retirement, Peter Schwalm, senior pastor of Fairhaven Church in Dayton, Ohio, began planning for his departure. Desiring continuity of missional direction,

Schwalm believed an internal succession would be the least disruptive for the church. . . . “We had seen another large church in Dayton go through a senior pastor change,” said Fairhaven Elder Tim Cornell. “The new pastor came from the outside, and he did a great job, but he totally changed the church. We didn’t want that. We liked the path we were on.” (Jethani 2005)

Church parishioners often want the stability of knowing their church will continue “to be a blessing to their children and grandchildren” even after the incumbent pastor is no longer at the helm (Russell and Bucher 2010, 16).

In studying succession antecedents, researchers found that an organization’s performance affects its ability to attract leadership talent (Dalton and Kesner 1985, 759). Rowe found that leaders need time to “acquire organization specific knowledge” (Rowe et al. 2005, 202), while Ocasio found that the legitimacy of a leader’s power does not begin to take hold until after his first decade at the helm (Ocasio 1994, 308). Next, church leaders should be mindful of the political forces at play prior to a relay succession.



Maintaining Christian character and integrity will help overcome some of the challenges that precede succession (Russell and Bucher 2010, 57-63). In addition, researchers found that while naming an heir apparent increases the likelihood of an internal succession, it does not guarantee it (Cannella and Shen 2001, 327-38; Gregory 1994, 310-11). Finally, churches often name an heir apparent and implement a relay succession plan in order to continue the missional trajectory of the church (Jethani 2005; Russell and Bucher 2010, 16).

### *Successor Origin*

The literature has identified three different means through which a successor can originate. The first means, inside succession, happens when organizations select someone from inside the company to replace the incumbent (Fondas and Wiersma 1997, 564). The next type of succession is outside succession. According to Dalton and Kesner, in this type of succession someone from outside the organization replaces the incumbent. It is typically used when the organization is in need of substantial change (Dalton and Kesner 1985, 750). Finally, the third means by which a successor can originate is relay succession. Cannella and Shen suggest that this type of succession occurs when an organization strategically plans for the leadership succession by naming a successor prior to the departure of the incumbent so as to facilitate the training of the successor by the outgoing leader (Cannella and Shen 2001, 252).

### **Inside Successors**

Dan Dalton and Idalene Kesner were the first to clearly define the inside and outside successor, something which had been subject to debate until this time (Kesner and Sebora 1994, 355). They stated, “An inside successor is a person promoted from

within the executive span of the predecessor; an outside succession occurs when the newly appointed CEO was not in the predecessor's span" (Dalton and Kesner 1983, 738). This definition helped to shape future research by comparing and contrasting firm performance when an inside or outside succession had been utilized.

Zhang and Rajagopalan define a nonrelay inside succession as "one in which the successor CEO was an executive of the firm prior to succession but was not the heir apparent to the predecessor CEO (The successor CEO was the winner of a 'horse race' among multiple internal candidates)" (Zhang and Rajagopalan 2005, 97). Inside succession, while providing leadership from someone who knows the organization, often costs businesses talented leaders since those who lose the "horse race" often resign or are terminated (Vancil 1987b, 262-65).

In later research, Zhang and Rajagopalan found that long-term changes implemented by inside successors tend to fare much better than those implemented by outside successors (Zhang and Rajagopalan 2010, 458). Their research found that "Inside CEOs, presumably due to their deeper knowledge and understanding of the firms strengths and weaknesses, are more likely than outside CEOs to initiate and implement strategic changes that can build the firm's long-term competitive advantage and growth" (Zhang and Rajagopalan 2010, 458).

In his dissertation on succession in the Presbyterian Church of Korea, Jin-Seok Park discovered that inside successors tend to "follow their predecessor's style and tend to be more conservative" (Park 2005, 143). In addition, Weese and Crabtree propose that an inside successor can "honor thy predecessor" by building upon previous ministries enacted by the incumbent (Weese and Crabtree 2004, 20-21). Finally, Vancil suggests

that the selection of a new leader from inside an organization communicates that there is no impending crisis. While new leadership and some changes will take place, a complete disconnect from the past is unlikely (Vancil 1987b, 56).

### **Outside Successors**

Outside succession is defined as a leadership transition where the successor is hired from outside the firm (Zhang and Rajagopalan 2005, 97). Businesses often choose to use outside successions when there is poor presuccession firm performance (Kesner and Sebor 1994, 355). Wiersema conducted a study in 1992 that examined “the degree of strategic change prior to succession and the nature of executive succession” (Wiersema 1992, 80). Wiersema’s study found that when an external leader was chosen to lead a firm, there was “significantly more strategic change post-succession” than for firms that promoted a successor from within the organization (Wiersema 1992, 89). In his research on the succession practices of General Electric, Merrill Lynch, and Ex-Cell-O, Vancil states,

The decision to recruit a new CEO from outside the company is not taken lightly. The conventional wisdom in U.S. corporations today is that it is healthy to grow your own CEOs, for a variety of reasons. But sometimes, and particularly in smaller companies, that simply doesn’t work. . . . In many situations, however, bringing a new CEO from outside is a signal that major change is necessary and that no insider can bring the fresh perspective that is required (Vancil 1987b, 57).

According to Park, in the church, pastor’s that are chosen from the outside bring more changes to the church structure and ministries. They also experience “more shock and trouble in comparison to any internal successors” (Park 2005, 142-43, 151). When an outside successor is chosen, the new pastor is free to enact a new mission and move toward new congregational commitments (Mead 2005, 60).

## Relay Succession

Relay succession has been a relatively recent topic of study in succession literature. Researchers have explored the concept largely in terms of succession consequences (Zhang and Rajagopalan 2004; Shen and Cannella 2003). Beyond these few studies, relay succession has received scant attention (Zhang and Rajagopalan 2005, 97; Giambatista, Rowe, and Riaz 2005, 983). Since it is foundational to the proposed research, the following section will define relay succession and explore the benefits of this type of leadership transition.

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, he 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)

In their review of relevant literature on succession research, Giambatista, Rowe, and Riaz define relay succession as the situation where “the new CEO comes from within the firm and has been the heir apparent of the predecessor” (Giambatista, Rowe, and Riaz 2005, 975). The common elements of relay succession are the systematic choosing of a successor and then initiating an orderly transition of power to minimize disruption within the organization (Goldsmith 2009, 11-15).

Weese and Crabtree define a healthy pastoral transition as “one that enables a church to move forward into the next phase of its external and internal development with a new leader appropriate to those developmental tasks, and with a minimum of spiritual, programmatic, material and people losses during the transition” (Weese and Crabtree 2004, 41). This definition affirms prior research that suggests relay successions encourage stability within an organization (Zhang and Rajagopalan 2004, 483). They suggest that healthy pastoral transitions offer several benefits—church stability, leadership training, continuous focus on the local church mission—to the incumbent, successor, and congregation (Weese and Crabtree 2004, 41-55; Warner 2005; Russell and Bucher 2010).

### ***Benefits of Relay Succession***

Although there are “descriptive and normative gaps” in the work on relay succession (Zhang and Rajagopalan 2004, 484), research has found several benefits when organizations implement a relay succession:

1. Relay succession is a tool organizations can use to successfully transfer leadership from the incumbent to the successor (Vancil 1987b, 20).
2. The successor in a relay succession can obtain on-the-job training through exposure to the CEO’s responsibilities (Ocasio 1999, 411-12; Zhang and Rajagopalan 2004, 483).
3. Relay successions give new leaders “time to accumulate organization specific knowledge” so that they can take action that will “positively affect [organization] performance” (Rowe et al. 2005, 202).
4. Relay succession signals stability to organizational stakeholders because it implies the CEO and board of directors are thinking about the future goals of the company (Cannella and Lubatkin 1993, 764; 788).
5. Organizations that have an heir apparent are already prepared should something happen to the incumbent CEO (Vancil 1978b, 88-90).

In addition, Zhang and Rajagopalan studied the consequences of relay succession. They found that there are

positive effects for post-succession performance of relay successors, and this effect was stronger when succession performance was low. Drawing on the learning theoretical framework of their paper, they argued for and found that relay successions were better able to cope with strategic and industry instability and transform performance. In these situations, non-relay successors were presumably still learning “the ropes to skip” and “the ropes to know.” (Giambatista, Rowe, and Riaz 2005, 975)

While relay succession may not be the best alternative for all organizations, research seems to suggest that those organizations that have reason to maintain stability would do well to consider it.

Despite the many benefits of relay succession, numerous organizations have failed to adequately plan for the primary leader’s departure (Brady, Fulmer, and Helmich 1982, 294). Successfully passing the baton of leadership to the next generation of leaders is one of the most important steps incumbent leaders can take (Goldsmith 2009, 7).

Stepp notes that “[planned] succession in Christian ministry, if approached in a deliberate, prayerful, and intentional way, can benefit the Church. It has this potential because it demonstrates an understanding of the realities of church life and leadership” (Stepp 2006, 203).

### **Successor Origin and Firm Performance**

Albert Cannella and Michael Lubatkin suggest that “sociopolitical forces such as the presence or absence of an heir apparent and the incumbent’s ability to influence the selection decision” will determine inside or outside succession (Cannella and Lubatkin 1993, 763). Their analysis found successor origin tended to be outside the firm when the organization’s performance was weak (Kesner and Sebor 1994, 355).

## **Succession Rules**

Ocasio studied the rules of CEO succession. He suggests that there is a significant support base for the board of director's reliance upon formal and informal rules of succession. When formal rules were in place for CEO succession, there was a strong correlation with using insiders to fill a CEO opening. Most board of directors seemed intent on following prescribed formal rules in the succession process even in the face of deleterious circumstances. Further, Ocasio found that boards also relied on firm precedent when appointing a successor. If there was a previous notion within the firm to appoint outsiders to the CEO position, boards were more likely to consider an outsider in their deliberations (Ocasio 1999, 411-13).

As a pastor who has led a congregation through a relay succession, Bob Russell states that "God can bless a variety of transitions, but an intentional plan has the best chance for success" (Russell and Bucher 2010, 57). He goes on to share that the incumbent pastor should initiate the discussion of a succession plan with the church board. Russell created a basic succession outline to share with the church board at Southeast Christian Church during the initial discussion of his impending retirement (Russell and Bucher 2010, 20-21; 57-58).

The research on the effects of successor origin present some interesting findings that may help to further understand relay succession. First, organizations that invest in training and development are more likely to choose a successor from inside who shares the organization's values (Dalton and Kesner 1983, 741). Second, smaller organizations may choose individuals from outside to bring change to the internal dynamics and structure (Wiersma 1992, 89; Cannella and Lubatkin 1993, 765). Third,

Park's research suggests that internal successors in the church bring stability, while external successors tend to be more "reformatory" (Park 2005, 143). Finally, if a plan is in place, the leadership board is more likely to follow it (Ocasio 1999, 386-87).

### ***Succession Contingencies***

Succession contingencies refer to research that investigates facets of successions found during the execution of the succession plan and not easily articulated in other areas of research. Researchers have studied CEO retirement, the psychological needs of the successor, succession in family businesses and the organizational context in which the succession plan takes place. Since churches are unique organizations (May 2010, 56-57), it will be of value to this study to examine a few of these contingencies.

#### **CEO Retirement**

In the book, *Power and Politics in Relay CEO Succession*, Gentry, Hurst and Shen suggest that that if the incumbent remains in the position of CEO beyond the normal retirement age, the likelihood of the successor moving into the top leadership role diminishes with time. "[This fact] makes it critical that the heir takes over as CEO as soon as the incumbent reaches retirement age. The heir has two choices: wait in his role as the heir apparent and hope for the best or attempt to usurp the incumbent CEO (Gentry, Hurst and Shen 2006, 121). Since it is often the CEOs decision when to step down and transfer authority to the heir apparent, the successor role in a relay succession can be filled with uncertainty. "There has been no empirical evidence to suggest what her [the successor's] tactics should be or how to influence the likelihood of ascension. Furthermore, empirical research has not addressed what an heir apparent's relationship should be with the board or the incumbent CEO" (Gentry, Hurst, and Shen 2006, 113).



## **Succession and Organizational Change**

Donald Helmich studied organizational growth and succession patterns. He examined “the relationship between modes of administrative succession at the corporate level and the organizational criterion of growth in manufacturing companies” (Helmich 1974, 771). His study examined firms that had two successive successions of various modalities—inside successor or outside successor.

Helmich’s findings were reflective of the trends toward hiring outside chief executives prevalent in the 1980s and 1990s. He concluded,

Companies experiencing succession patterns of two insiders in a row were less apt to reflect relative gains in organizational growth. In this sense, the earlier contention is supported that when inside officers are promoted to key positions this tends to reflect stability and conservatism in policies of expansion. If organizations are to remain increasingly viable by growth in a dynamic environment, it would appear that the outside promoted executive will become increasingly popular in key executive posts. Evidence of this trend toward the outside, career-oriented executive is to some degree apparent in the growth of professional management and the increased loyalty to professional societies. (Helmich 1974, 775)

Later, in 1975, Helmich analyzed “successor type, successor need deficiency, successor leadership style, and organizational change following a succession” (Helmich 1975, 429). Need deficiency can be defined as the extent to which a successor tailors his leadership style to gratify unfulfilled needs. Through this study he found that “outside promoted successors tend to exhibit a task-oriented style of leadership” (Helmich 1975, 437). Successors who are hired from the outside of a company tend to feel they have a mandate to bring about organizational change. They, in turn, focus on this responsibility rather than developing relationships with subordinates (Helmich 1975, 438).

Helmich’s study on successor need deficiency and organizational change was unique at the time of his research. Helmich observed that “most groups exist to satisfy

the current needs of the most influential group member and the function of any group can be better understood in terms of the major needs of its more dominant member than in undifferentiated terms for all members” (Helmich 1975, 431). He found that in studying changes in leaders and leadership, successor need deficiency was the most important variable.

Helmich further found that following a leadership change “there was a significant relationship between successor need deficiency and (a) promotional origin of the successor, (b) leadership behavior of the new leader, and (c) organizational change— personnel turnover and formal shifts within the executive staff” (Helmich 1975, 439).

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 (Richards 2008, 461). In addition, Richards states, “CEOs, as indicated from the interviews insist upon being able to make their own senior management appointments, using processes that are mostly not transparent . . .” (Richards 2008, 460).

### **Family Businesses**

In 1976, Barnes and Hershon articulated the unique challenges family businesses face when passing leadership from one generation to the next. They describe “agonizing experiences” that involve “years of tension and conflict” as one generation passes senior leadership to the next. They studied 35 companies and interviewed over

200 executives in family owned or controlled companies of various industries (Barnes and Hershon 1976, 105).

Barnes and Hershon indicate that while some leadership transitions in family businesses may seem orderly, most have compelling challenges. Their research “led [them] to begin a more formal research inquiry into what happens as a family business, or more accurately, a family and its business grow and develop over generations” (Barnes and Hershon 1976, 106). More specifically, they sought to answer the following questions: “(1) What happens in the family and company between those periods when one generation or another is clearly in control but both are ‘around’?; (2) How do some managements go through or hurdle the family transition without impeding company growth?; (3) Can or must family and company transitions be kept separate?” (Barnes and Hershon 1976, 106). Their research concluded that most first to second generation family successions in business do not fully transfer power until the founder dies. Many of these organizations plateau or begin to decline because they fail to initiate an orderly, purposeful succession plan (Barnes and Hershon 1976, 108).

Later, in 2003, Lee, Lim, and Lim continued the study of family business succession. They examined “(1) the effects of specific human capital in the form of idiosyncratic knowledge and (2) the ability of prospective successors on families’ choice for their business” (Lee, Lim, and Lim 2003, 657). They found that some family businesses that are highly idiosyncratic may opt for a lower performing family member to become CEO rather than a higher performing outside successor. They reasoned that families are more comfortable bringing someone into the top leadership role who

understands the nuances of the organization rather than someone from outside who would have no knowledge of those distinctions (Lee, Lim, and Lim 2003, 657-58).

This research is important because churches are often viewed in a similar organizational category as family businesses (Arregle et al. 2007, 75). There are many distinctions within a church that are learned over time and cannot be easily handed over to an outside successor (Park 2005, 42). Lee, Lim, and Lim suggest that selecting a family member from inside the organization to become the top leader may not be an example of nepotism, but rather it stems from the need to find someone who clearly understands the day-to-day operations and challenges of a unique organizational system (Lee, Lim, and Lim 2003, 664).

### **Organizational Context**

In one of the few studies of its kind, Jeffrey Pfeffer and Gerald Salancik studied *Organizational Context and the Characteristics and Tenure of Hospital Administrators*. Their study analyzed “the tenure, pattern of succession, and characteristics of chief administrators in 57 hospitals in a large midwestern state” (Pfeffer and Salancik 1977, 75). Their findings suggested that “administrators are selected to cope with the organization’s critical contingencies, and that these contingencies are related to the organizational context. In other words, the contingencies confronted by hospitals, deriving partly from their specific context, determine the dimensions of succession to the chief administrator position” (Pfeffer and Salancik 1977, 75).

This study developed the hypothesis that there was a “relationship between specific characteristics of CEO’s and the organizations” that they lead (Kesner and Sebor 1994, 341). Pfeffer and Salancik found that those who were specifically trained

in hospital administration were more likely to administer hospitals that experienced surpluses in their operating budget. They suggested that hospitals that do not have an operating surplus would be more likely to experience negative contingencies and thus more likely to replace administrators at a higher frequency (Pfeffer and Salancik 1977, 81).

As the amount of training in hospital administration increased, so did the amount of surplus incurred in the hospital budget (Pfeffer and Salancik 1977, 84). This study established a link between the skill of the administrator and the industry within which he or she was employed. The study also questioned the common notion that top-level administrators could move from one industry to another without being skilled in the new industry since it was assumed that skills and characteristics for senior leaders were uniform across disciplines (March and March 1977, 377).

### **Organizational Politics**

First Baptist Church, Dallas has often been discussed as an unsuccessful attempt at relay succession. 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 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. (Perry 2005, 120-21)

Jimmy Draper, and later Joel Gregory, attempted to succeed Criswell but political forces prevented the succession (Gregory 1994, 305-07).

A brief review of succession contingencies has shown that outside successors tend to feel they have a mandate to bring about organizational change (Helmich 1975, 438). In addition, organizations that desire long-term stability are more apt to choose successors from within (Helmich 1974, 775). Third, full transfers of power from predecessor to successor often do not happen until the predecessor is completely removed from organizational influence (Barnes and Hershon 1976, 108). Finally, Perry and Gregory further suggest that political forces in the church can derail plans for leader succession (Perry 2005, 120-21; Gregory 1994, 305-07).

### **Ceremonial Transitions**

When it comes to the actual time of transition, Russell and Bucher suggest a symbolic transfer of leadership is essential for those who have an interest in the organization. At the time of Russell's own transition from Southeast Christian Church, he utilized a baton that he passed to his successor, Dave Stone, as a symbolic means of illustrating a change of leadership. He states, "I chose to use a baton and publicly handed it to my successor and encouraged him to run the next leg of the race with diligence and faithfulness to God's Word" (Russell and Bucher 2010, 79). Jim Henry, pastor of First Baptist Church in Orlando, Florida used foot washing as a means to symbolically transfer leadership to his successor (Pedicini 2006). The symbols of transition seem to convey a sense of working together toward a common goal and a willingness to make unified transitions for the good of the organization (Goldsmith 2009, 101-08; Russell and Bucher 2010, 79).

## *Succession Consequences*

Researchers studying succession consequences seek to understand the effect of leadership change on an organization. Many firms initiate a leadership change in order to accomplish specific organizational changes. Researchers examining succession consequences seek to understand if the succession process will accomplish the desired result. Unfortunately, the focus of research in the area of succession consequences has focused almost solely on post-succession performance to the detriment of other areas of inquiry such as “strategic change and restructuring” (Giambatista, Rowe and Riaz 2005, 978).

### **Performance**

Seeking to validate Grusky’s earlier work, researchers Eitzen and Yetman studied succession in college basketball teams using 129 NCAA member colleges and universities in 1972. They found that

although a coaching change appears to have little effect upon initial team performance, the introduction of a new coach provides a possibility for long-term change and improvement that might not have been possible if a coaching change had not occurred. The longer the coaching tenure, the greater the likelihood that a coach will be successful, but according to these data there is a certain length of time (thirteen years or more) beyond which effectiveness begins to decline. (Eitzen and Yetman 1972, 115)

While their findings were similar to Grusky’s, their association between coach succession and team performance was weaker. Further, they found that coaches hired at schools where teams previously won less than 50% of the games improved winnings at the end of the first year. Their data suggests, however, that these teams were likely to increase their performance with or without a coaching change (Eitzen and Yetman 1972).

Eitzen and Yetman concluded that “once they controlled for previous levels of team

success, a change in coaches made no difference in performance” (March and March 1977, 74).

Jeffery Pfeffer and Alison Davis-Blake suggest several reasons for a “little or no effect managerial succession.” First, they suggest that there are two opposing forces at work which mitigate the effects of each other—“the positive effect from the replacement of an unsuccessful manager and a negative effect resulting from the disruption occasioned by the succession” (Pfeffer and Davis-Blake 1986, 74). Second, they suggest, as do Gamson and Scotch, that managers really do not matter much in successions. This notion that a change in managers did not matter continued to gain popularity among researchers (March and March 1977, 377). “A third possibility is that managers do matter, but that in order to observe a managerial effect, investigators need to consider the characteristics or abilities of managers” (Pfeffer and Davis-Blake 1986, 74).

Failure to plan for transitions can be costly in the athletic and business fields as well as within the local church. Weese and Crabtree define a healthy church-based transition. They state,

A healthy pastoral transition is one that enables a church to move forward into the next phase of its external and internal development with a new leader appropriate to those developmental tasks, and with a minimum of spiritual, programmatic, material, and people losses during that transition. The focus should be on preserving spiritual, programmatic, material, and people resources as much as possible during the transition. (Weese and Crabtree 2004, 41)

Post-succession, it is possible for churches to “gain a step” if the succession is handled prayerfully and effectively (Russell and Bucher 2010, 47).

### **Leadership Effectiveness**

In one of the few empirically based studies on church succession and leadership, Smith, Carson, and Alexander studied the impact of leadership on



organizational performance in Methodist churches. Their sample was culled from the Northeast Ohio Conference of the United Methodist Church and consisted of fifty “full-time, credentialed pastors [who were] eligible to be appointed to any church in the Conference” during the time period of 1960-1980 (Smith et al. 1984, 767). They examined church attendance, membership, property value, General Assembly giving, total giving, and pastor salary as objective measures of organizational performance (Smith et al. 1984, 768).

Smith, Carson, and Alexander suggest that the inquiry into succession and pastoral leadership present a unique opportunity. They state,

First, quantifiable information on each organization’s (church’s) performance was available and could be compared to the performance of other similar organizational units. Second, it was possible to use this information to identify outstanding performance by an individual minister in one organization and to determine if the leader could achieve similar results in other units. The United Methodist Church has a historic policy of regular reassignment of ministers (on the average of every five years). Thus, replacement of the leader is somewhat independent of his/her performance or the organization’s performance. Finally, this policy of regular reassignment permitted an investigation of the related issue of organizational succession and performance. (Smith et al. 1984, 767)

This study proposed the idea the succession event alone may have very little effect on organizational performance; rather, leadership effectiveness seems to be a more accurate predictor of future church performance (numeric growth, financial growth, etc.). When the researchers separated effective leaders as determined by the United Methodist Church guidelines for pastoral salary increases from all other leaders, their results were statistically significant indicating that effective leadership is associated with organizational performance. Before this study, the leadership performance and succession literature had failed to analyze “leader influences” from other “contingent organizational factors” (Smith et al. 1984, 774). This study provided one of the first

opportunities to particularly examine leadership apart from other organizational challenges.

Smith, Carson, and Alexander's study challenged the concept that succession in and of itself would cause a noticeable disruption in organizational performance. Most scholars since Grusky acknowledged that the succession event would cause some effect to firm performance, even if slight. Smith, Carson, and Alexander's research, however, supported the earlier work of Gamson and Scotch that indicated that factors other than succession impact organizational performance (Smith et al. 1984, 775; Gamson and Scotch 1964, 72). "An examination of organizational performance for the total sample of churches shows that changes in leadership do not disrupt organizational performance or lead to immediate improvements as such research has suggested" (Smith et al. 1984, 775). While this study suggests that the succession event itself may not affect long-term performance, it does indicate that "superior" leaders positively impact the organizations they lead (Smith et al. 1984, 774).

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).

### **Effects on Finances**

Reinganum examined 667 different companies listed on the NYSE that had management changes during 1978 and 1979 as recorded by the *Wall Street Journal*. He identified 1,236 management changes within these companies and explored the effect these changes had on subsequent stock prices. Until this time there had been few, if any, studies on the effect of management succession on a firm’s financial performance (Reinganum 1985, 49).

Reinganum found that researching the context of the organization in which succession takes place is critical to scholarly inquiry. He states, “The empirical analysis in this paper suggests that the effects of executive succession, as measured by abnormal stock market performance, are dependent on three variables: the size of the firm, the origin of the successor (insider versus outside), and the disposition of the predecessor” (Reinganum 1985, 57). He found that “an announced change in top executives signifies an improvement only in cases in which the new executive is an outsider, the firm is small, and the previous office holder departs from the firm” (Reinganum 1985, 57). Dyl suggests that “the fact that external appointments are associated with smaller corporations may indicate that small firms generally have less well-developed internal labor markets than large firms. That is, firm size appears to be functioning as a proxy for management depth in Reinganum’s study” (Dyl 1985, 374).

Small firms, however, were not immune to negative or flat succession effects. If the previous office holder remained in an executive capacity in the firm after the

succession had taken place, Reinganum observed no change in stock prices. Dyl suggests that, in this case, the markets see there is no real change in leadership (Dyl 1985, 374). Further, Reinganum found that the financial position of large firms changed very little during a succession with no deference to the origin of the incoming CEO. He concluded that the notion that simple models of research can predict post-succession firm performance is inappropriate. Rather, researchers must account for firm size, successor origin, and predecessor disposition to accurately predict succession effect (Reinganum 1985, 58). Reinganum explained that

while this research is exploratory, it offers new evidence about the effects of executive succession and suggests a different method to measure performance. The empirical evidence indicates that one must know the size of the firm, the origin of the successor, and the disposition of the predecessor before succession effects can be properly analyzed. The advantage of the event-study methodology for studying succession in business organizations is that the anticipated effect of long-run changes in corporate performances can be measured over a relatively short time span, using capital market data (Reinganum 1985, 59).

Researchers examining the consequences of succession found that the leadership skills of the successor do make a difference in future organizational performance (Smith et al. 1984, 774). Those who have a knowledge of the organization prior to assuming the top leadership role tend to make decisions based on their previous knowledge of the firms strengths and weaknesses (Zhang and Rajagopala 2010, 458). In addition, May suggests that the employment of relay succession in the church may offer an opportunity for improved post-succession performance (May 2010, 120). Further, he articulates that succession research must examine organizations in a multi-faceted way in order to gain a clear picture of succession effects (Reinganum 1985, 58). Finally, it should be understood that both new leadership and the succession event itself may impact an organization's future performance.

## **Profile of the Current Study**

This literature review informed and shaped the current study through an overview of the biblical, historical, and theoretical concepts related to relay succession. It revealed a variety of ideas concerning relay succession planning in the local church. First, succession planning in ministry is a concept that can be validated through the Scriptures. While the Bible does not hide the challenges various leaders had in passing leadership to the next generation, it does give helpful examples of succession from which to draw principles applicable to contemporary ministry.

Second, 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.

Third, in the field of business management, the literature indicated that organizations that were concerned about sustainability were also concerned with succession. Business leaders seem to see succession, particularly of top leaders, as a force that provides stability both in the market and the workforce. Succession in business is becoming a must for those who are concerned about the long-term success of their organization.

Finally, the literature review has shown that there is a gap in the understanding of the process of relay succession. Giambatista, Rowe, and Riaz suggest that "if the current status of theory in succession literature could be described in one phrase, that phrase would be fragmented and variable" (Giambatista, Rowe, and Riaz, 2005, 981). Given this is true in secular organizations, it is true to a greater extent in ministry

organizations, particularly the local church (Weese and Crabtree 2004, 2). The nature of the church requires that leadership decisions be uniquely addressed in terms of God's vocational call. Since there are few recent resources that address ministry succession, much remains to be understood. The research sought to articulate the process and principles of succession in the senior pastorate by examining several best-case- examples of relay succession in COG churches. The resulting information provided a framework for planned ministry succession so that churches can more clearly achieve long-term leadership sustainability.

## CHAPTER 3

### METHODOLOGICAL DESIGN

The review of the germane literature regarding leadership succession has shown that succession planning is a necessary task of business and ministry organizations (Schwandt and Marquardt 2000, ix; Charan 2008; Goldsmith 2009). It has further shown that many local churches do not proactively plan for pastoral vacancies (Weese and Crabtree 2004, 2; Stepp 2005, 203). In order to better understand one method of pastoral transition, this chapter outlines and further details the objectives, procedures, and methods needed to determine characteristics of relay succession within the senior pastorate. Four research questions have been developed to help guide the focus of this study.

#### **Research Question Synopsis**

1. What are the antecedents of a relay succession plan?
2. What is involved in the selection process of a new pastor in the context of a relay succession plan?
3. What is the process of implementing a relay succession plan?
4. How is the average weekly attendance and average weekly financial giving of a congregation affected in the context of a relay succession plan?

#### **Design Overview**

The procedure to answer the above research questions was conducted in three phases through a qualitative, descriptive, multi-case study method. A qualitative

approach was used because relatively few churches have engaged in relay type successions. Further, a qualitative study provides a detailed description of the succession process utilized in selected churches that may be transferrable to other churches. In their overview of research in the field of succession from 1994-2005, Giambatista, Rowe, and Riaz suggest that most studies to date have relied upon quantitative methods of inquiry, yet a qualitative study will offer “potential for exploring the many holes and gaps in our understanding of processes from the early stages of succession (planning, searching, etc.) and exactly what it is successors do . . . . The opinions and observations of executives who have lived these events would be of great help (Giambatista, Rowe, and Riaz, 2005, 984). Merriam indicates that one of the purposes of qualitative research is to provide a “rich, thick description” of the phenomena being studied to allow the reader to transfer findings to their particular context (Merriam 2009, 29). In addition, May indicates that a qualitative study of relay succession “does appear to hold promise” (May 2010, 125).

The first step in Phase 1 consisted of developing a data collection protocol to ensure the validity and reliability of the data collected through the proposed research. Next, the researcher selected four local church cases of relay succession in the COG denomination to serve as study sites. Four case study sites were selected because evidence from multiple case studies is often considered more compelling than information gathered from a single case study (Yin 2009, 53).

During Phase 2 of this study, the researcher collected data on each relay succession case to be studied. The case studies were conducted through the protocol developed in Phase 1. Key informants such as the incumbent pastor, the successor pastor, and the state overseer were interviewed to determine successor origin, succession



antecedents, succession consequences, and succession contingencies. A case study report for each site was compiled to assist in data comparison and analysis. This process was replicated with each church that was studied.

In Phase 3, the researcher drew cross-case conclusions and developed implications that resulted from the collected data. A final analysis of findings was developed to answer the initial research questions.

### **Population**

The population for this study consisted of churches that are located in the United States, are affiliated with the COG, have statistical reports that are current for the study period, and reported averaging more than 150 people in weekly worship attendance in the most recent year of the study period. Only one denomination was chosen to allow for manageability of the study because a cross-denominational study would be difficult since different denominations collect and categorize local church information differently (Rainer 1996, 6). The researcher used purposeful sampling to select churches that meet the study criteria. “The logic and power of purposeful sampling lies in selecting information-rich cases for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance . . .” (Merriam 2009, 77)

### **Sample and Delimitations**

The selection of the four case study sites was delimited to those COG churches that experienced a relay succession during the study period 1994-2009. COG churches that experienced other types of succession were not included in this study. Since the particular focus of the research was to qualitatively understand relay succession in the COG, a nonprobability, purposeful sampling method was utilized (Leedy and Ormrod

2005, 206). Purposive sampling allows the researcher to select “*information-rich* cases for study in depth. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry, thus the term *purposeful sampling*” (Patton 2002, 230). In the case of this research study, the inherent need to research churches that have experienced a relay succession warrants the use of purposeful sampling.

### **Limitations of Generalization**

Qualitative research dictates that generalizations are viewed distinctively from other types of research. First, qualitative research provides the reader, rather than the researcher, with enough detailed information to transfer findings to the reader’s own particular situation. “Providing a *rich, thick description* is a major strategy to ensure external validity or generalizability in the qualitative sense. This involves providing an adequate database, that is, enough description and information that readers will be able to determine how closely their situations match, and thus whether findings can be transferred” (Merriam 2002, 29).

A second way that qualitative research can expand the generalizability of findings is through multi-case designs. Multi-case designs assist in replicating findings from one case to another, thus expanding their generalizability. “The evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as being more robust” (Yin 2009, 53). In addition, it does appear that the findings may serve to better inform pastors and denominational leaders of how to implement a relay succession.

## **Instrumentation**

The research questions were answered through a case study protocol that included extensive interview questions. None of the churches included in this study created formal documentation of the succession; thus, document analysis beyond the interview transcripts was not possible. The interview questions were formed according to the categories found in the literature review—successor origin, succession antecedents, succession consequences, succession contingencies—to determine the reasoning behind and experience of executing a relay succession. Each question was open-ended to allow those interviewed to answer as thoroughly and articulately as possible concerning their involvement in the pastoral succession process. The protocol was then submitted to the researcher's expert panel.

The researcher digitally recorded responses to the questions during interviews. In addition, each interview was transcribed from the recordings. As the interviews for each case study were completed and transcribed, they were coded for content analysis by the researcher. Dedoose qualitative analysis software was used to assist in the data management process.

In order to maintain as great a consistency as possible in the interviews at each case study site, the researcher, following the recommendations of social scientists Fowler and Mangione, used the following techniques:

1. Read the questions exactly as worded.
2. If the respondent's answer to the initial question is not a complete and adequate answer, probe for clarification and elaboration in a nondirective way; that is, in a way that does not influence the content of the answers that result.

3. Answers should be recorded without interviewer discretion; the answers recorded should reflect what the respondent says, and they should only reflect what the respondent says.
4. The interviewer communicates a neutral, nonjudgmental stance with respect to the substance of answers. The interviewer should not provide any personal information that might imply any particular values or preferences with respect to topics to be covered in the interview, nor should the interviewer provide any feedback to respondents, positive or negative, with respect to the specific content of the answers they provide (Fowler and Mangione 1990, 33).

As the data was analyzed, it was coded according to the categories revealed in the literature review: successor origin, succession antecedents, succession consequences, and succession contingencies. These categories assisted the researcher in developing each individual case study, a final cross-case analysis in Phase 3 of the research design, and, ultimately, in answering the research questions.

### **Expert Panel**

The researcher utilized a group of 10 individuals to serve as the expert panel. Panelists included were recognized experts in the field of pastoral studies, Christian education, and church leadership. The panelists were contacted to explain the purpose of this research, their function as part of the expert panel, and the expected time commitment involved. They were then given the opportunity to review the proposed protocol and make suggestions for changes as necessary. Adjustments to the protocol were made based on the recommendations of the expert panel and the advice of the first reader. At the conclusion of the study, each panelist received a thank you letter, a small token of appreciation, and a summary of the research findings.

## **Procedures**

The following provides a description of the procedures that were utilized in answering the research questions. This study was completed in three phases.

### ***Phase 1***

In Phase 1, after the germane literature was reviewed, the next step in answering the research questions was the development of the case study protocol. According to Yin, the protocol assists the researcher in increasing reliability and carrying out data collection. The protocol included an overview of the objectives of the project, the field procedures utilized, and the “specific questions that the case study investigator must keep in mind” (Yin 2009, 79-81).

The case study questions contained in the protocol were grouped together in the following categories derived from the literature review: successor origin, succession antecedents, succession consequences, and succession contingencies. The questions were arranged to assist the researcher in gathering information about relay succession from key informants such as the incumbent pastor, the successor pastor, and the state overseer.

Before the interview questions became part of the case study protocol, the researcher completed the necessary documents related to the “Assessment of Risk to Human Research” and applied for approval of the research questions from the Research Ethics Committee of The Southern Baptist Theological Seminary. In addition, the questions were also submitted to the expert panel for review. The expert panel recommended minor adjustments to the initial interview questions. These suggestions were then implemented in the final draft and submitted to the first reader for final review.

Once the protocol was approved, the researcher chose four churches to serve as the case study sites. The churches were selected according to the following conditions:

1. The church must be affiliated with the Church of God denomination headquartered in Cleveland, Tennessee.
2. The church must have had a relay succession during the study period of 1994–2009.
3. The church must have had an average weekly attendance of not less than 150 people at the time the relay succession was executed. The church must have records of financial giving and attendance available for the study period.
4. The incumbent and successor pastor must be available for interview.

The researcher met personally with the two highest elected officials in the COG to discuss possible churches for inclusion. In addition, the expert panel, pastors and other church leaders were asked to submit names of churches that met the study criteria. Finally, the researcher posted an item on a denominational message board frequented by COG pastors to request additional names of churches in the COG that had initiated a relay succession. From the list of churches that emerged, websites were reviewed and current local church leaders were contacted to determine possible inclusion in the research project. Once the four case study sites were selected, a preliminary phone call was made to reaffirm that each church met the selection criteria and that the three key informants were available for an interview.

The churches selected varied in location from the southeast, mid-Atlantic, and Potomac highlands geographic regions of the United States. They were located in urban, suburban, and rural areas. Most of the churches were large, multi-cultural congregations. The smallest congregation consisted of approximately 300 worshippers each Sunday while the largest congregation had more than 2,000 attendees.

## *Phase 2*

In Phase 2 of the research, the researcher utilized the protocol developed in Phase 1 to gather information from each informant at each case study site. The data from each site was kept separate throughout this phase. The interviews were conducted with informants at a time and place of mutual agreement. The researcher visited every area in person where each church was located and every effort was made to conduct all interviews in person; however, two telephone interviews were necessary due to one informant's traveling out of the country for an extended period and another who was caring for a spouse with a life-threatening illness.

The researcher emailed the case study protocol to each participant at least one week prior to the interview to allow for thoughtful and thorough responses. In addition to the protocol, informants received a listing of necessary definitions related to the research study (Fowler and Mangione 1990, 86). Permission was sought and granted from the informants to digitally record the interviews. Billiet and Loosveldt suggest that recording the interviews has a "significant" effect on better interviewer performance. In addition, to improve the quality of responses, they advise "reading the questions as they are worded; asking every question that applies to the respondent, . . . making sure the answer is correctly understood and that it is adequate" (Billiet and Loosveldt 1988, 205-06).

Of the initial four churches selected to participate in the study, one church was replaced after the incumbent and successor pastor interviews were conducted because of the death of the state overseer that participated in that transition. According to the selection criteria, the incumbent pastor, successor pastor, and state overseer must all be available to interview in order to include the church in the study. The initial list of eligible churches was consulted again and a new church was selected to replace the one

that was removed. The contact procedures in Phase 1 were utilized to ensure the new church met the selection criteria.

Once the interviews for each respective case were completed, they were transcribed so as to generate text-oriented data. In order to allow the informants to share as openly and freely as possible, the promise of confidentiality was granted during the interviews. As the interviews were transcribed, individual identifiers were removed and replaced with generic character identification such as “A,” “B,” “C,” etc. The transcribed interviews were then submitted to each informant for review and feedback to insure that what was transcribed was accurate. The informant review process “enhanced the accuracy of the case study, hence increasing the *construct validity* of the study” (Yin 2009, 183).

Once approval was given by each informant, the researcher coded and analyzed the transcripts using a content analysis approach facilitated by Dedoose© qualitative analysis software. This enabled the researcher to examine the data in a systematic and thoughtful manner. In order for the coding of the data to be effectively correlated to the identified categories of relay succession (e.g., origin, antecedents, consequences, and contingencies), the researcher functioned as the interpreter of the content analyzed (Leedy and Ormrod 2005, 142).

As the data was coded and analyzed, the researcher employed a peer review process and maintained an audit trail of the research in order to preserve acceptable levels of reliability and validity. Merriam indicates that the peer review process is built into dissertation research through the researcher’s committee and colleagues that comment on the findings and research design. The raw coded data was made available to the



researcher's cohort for comment and feedback. In addition, the audit trail shows "how the data were collected, how categories were derived, and how decisions were made throughout the inquiry" (Merriam 2009, 220-23). Further, a research journal was maintained during the process of data collection and analysis.

Phase 2 concluded with the development of individual case study reports to account for the research at each case study site. The researcher followed Yin's suggestion for multiple case study research and utilized a question and answer format for the individual case study reports (Yin 2009, 171). Phase 2 was completed once the informant review process concluded and the case study reports were finalized.

### ***Phase 3***

Phase 3 examined each case study report in order to draw cross-case conclusions and further develop any implications that resulted from the collected data. While the cross-case analysis differed little from the analysis of the single case studies, it assisted in developing "themes and typologies that conceptualize the data from all the cases" (Merriam 2009, 204).

The goal was to "build a general explanation that fits each individual case, even though the cases varied in their details. The objective is analogous to creating an overall explanation, in science, for the findings of multiple experiments" (Yin 2009, 142). Researching and analyzing the data in the manner stated above provided answers to the four research questions of this study.

## CHAPTER 4

### ANALYSIS OF FINDINGS

The research findings were analyzed according to the purpose of this study, which was to articulate the process and principles of relay succession in the senior pastorate within the COG. Case study methodology helped the researcher to discover how four COG churches created and implemented a pastoral succession plan. The following discussion seeks to present the research data collected from the various case study sites in a clear and unbiased fashion in order to accurately communicate the research findings. This chapter will then articulate both the strengths and weaknesses of the research design.

#### **Compilation Protocol**

The data for this research was collected in the form of interviews guided by the case study protocol. The research methodology for this study included three phases: (1) define and design; (2) prepare, collect, and analyze; and (3) analyze and present conclusions. This section will describe the process for each phase.

#### ***Define and Design***

This phase of the study began with a thorough review of the pertinent biblical and scholarly literature on relay succession. A framework of understanding emerged from an examination of the biblical foundations as well as the historical and theoretical foundations of succession planning that assisted in developing the case study protocol.

The case study protocol guided the data collection process at the individual case study sites. Based upon the literature review and the research questions, *a priori* categories emerged in the following areas: succession antecedents, successor origin, succession contingencies, and succession consequences. The data collected from the interview questions within the protocol was classified into these four categories for further analysis.

### ***Prepare, Collect, and Analyze***

The second phase of the study was to prepare, collect, and analyze the data. The case study protocol and interview questions were designed to guide the interviewer in answering the research questions. The protocol sought to assist in data triangulation by gathering information from multiple informants through the use of semi-structured interviews. The interviews were recorded and a transcript of each interview was prepared for analysis.

The data was imported into Dedoose, a web-based qualitative data analysis software program. The content was grouped for comparison into the following categories: personal background information, data on succession antecedents, data on successor origin, data on succession contingencies, and data on succession consequences. This process was replicated for each case study site.

### ***Analyze and Present Conclusions***

The final phase of this study was to analyze the data and present conclusions. Once each case study was completed, the data was analyzed to determine if there was a general explanation of relay succession planning that “fit each individual case, even

though the cases will vary in their details” (Yin 2009, 142). The conclusions are presented in this chapter.

### **Findings and Displays**

As the data was collected, transcribed, and analyzed, the information was grouped into five interview categories so as to provide a process of managing the acquired data. In what follows, the narratives of each case study are presented. The next section, then, provides analysis describing the relationship of these studies to each research question. To allow informants the opportunity to share as openly and freely as possible, anonymity in reporting the results was granted. In addition, the data displays are provided to assist in drawing applicable conclusions to one’s own context (Yin 2009, 119).

#### ***Church-A***

Church-A began as a mission church in early 1982. By the time the incumbent, Incumbent-A, became the first pastor and set the church in order in late 1982, the church was very small numerically, met in a storefront building, and had very few financial resources. Incumbent-A studied to be an accountant by trade but eventually lost interest, sensing a call ministry. He began to spend more time seeking the Scriptures and sought to share the gospel with others. Over time, he eventually earned a bachelor’s degree from a small, southern Bible college.

Before his time at Church-A, Incumbent-A had previously pastored a few churches in the southeast. He sensed God calling him to the particular geographical location where Church-A was started. Other COG churches were in the area and both the state and national denominational leadership preferred that another church not be started

in this area. Regardless, Incumbent-A pressed ahead and continued to set in order what would become Church-A. “I was not the most popular guy in the Church of God when I came here. State headquarters was not fond of what I did, and general headquarters was not fond of what I did” (Interview 1).

### **Succession Antecedents**

The church grew steadily under Incumbent-A’s leadership, eventually reaching over 1000 people in Sunday morning worship by the time of his retirement. In 1990, the eventual successor, Successor-A, began attending Church-A while serving as a technology officer at a local hospital. In 1991, he became a church member and was “involved in various aspects of ministry” (Interview 2). In early 1994, a position opened at the church for a children’s pastor and Incumbent-A approached Successor-A about working part-time in that role. At that time, the pastoral staff of the church was comprised of the senior pastor, a youth pastor, and the children’s pastor. Successor-A agreed and served as the part-time children’s pastor until August of 1994 when the position became full time. In 1997, Successor-A’s role was changed once again to associate pastor, and he was given responsibility of various departments in the church. The youth pastor at that time also became an associate pastor with various departments under his leadership as well. During this period, the hierarchy of the church leadership consisted of the senior pastor having oversight of the two associate pastors and then the two associate pastors having oversight of all church departments.

### ***Impending Transition***

After approximately 17 years of ministry at Church-A, Incumbent-A stated, “I felt it was my time to get out of full-time pastoral work. I longed to do mission work”

(Interview 1). The appointment process of pastors by a state overseer, however, was a concern to Incumbent-A: “The state overseer can make a big difference in the [succession of pastors]. If he has somebody in mind to succeed the present incumbent, you have to state your case for the one you feel is best suited to succeed you” (Interview 1).

In 1999, the church sponsored Successor-A’s associate pastor colleague to plant a church in a nearby town. This left Successor-A as the heir apparent. Incumbent-A “commenced the grooming of [Successor-A] as pastor” (Interview 1). Incumbent-A eventually approached the state overseer, Overseer-A, to discuss the possibility of Incumbent-A’s retirement. “We communicated, we shared and [Overseer-A] worked with me to consummate the transition” (Interview 1).

Overseer-A and Incumbent-A met to discuss the desire of Incumbent-A to initiate a relay succession rather than follow the more traditional approach of the COG, which consisted of direct appointments by the overseer with an approval vote by the congregation. Overseer-A stated,

[Incumbent-A] came to me and told me that sometime in the future he would be retiring and that I needed to be giving thoughts to his replacement. He asked me, "Do you have anybody in mind?" "Who might you think would be the person?" He said again, “This is not imminent but it will possibly be coming some time under your administration” and so he alerted me and initiated [the discussion of succession]. I then asked him, “Well, you’re the one who planted the church and started it and has built it this far. Since God used you to do that, you must have some feeling as to who might be a good fit to follow you. I certainly am open to your recommendations.” Incumbent-A replied, “Well, I have a young man on my staff that I think could be good for that, and I would like for us to go through a transitional period where I back off and become more of a supervisor of the board, the finances, and everything related to the operational needs of the church, allowing him to assume more of the preaching responsibilities.” And so it was in that fashion [that he made the decision to go with Successor-A]. (Interview 3)

## Successor Origin

As Incumbent-A sensed his retirement drawing closer, he felt the need to identify his successor and begin the process of establishing a transitional period of church leadership. “[Successor-A] was on staff with me for 9 years before we commenced the transition program. . . . I felt personally that [Successor-A] was the man for the church” (Interview 1). Successor-A recalled that while there were other staff members at the church, he was the only one at the time of Incumbent-A’s impending retirement that had been with the church for an extended amount of time and understood the culture that had developed over Incumbent-A’s tenure. Successor-A stated,

In 1999, when we sponsored [associate pastor’s name], he went and started a church in [name of town] called [church name] and is still going at that great church. So when it came time for [Incumbent-A] to retire, I was the guy who had been with them for 7 to 8 years. I knew them and they knew me. . . . I stepped into a role and, as the church grew, I was growing with it. So, I was just the obvious choice. . . . So, [Incumbent-A] was here for 19 years. When he decided he needed to retire it provided the spark that made us know we needed to do something. He had the foresight to realize that he needed to work with [the succession process] for some time because he was very cautious about bringing in a successor from the outside. They didn't want somebody coming in off the state overseer’s list who needed to be off the list for a few years and then [would leave]. One of the catalysts in [Incumbent-A’s] decision to retire was that the church had grown beyond his style of pastoring. He is hands on. If somebody is sick, he is going to be there. If someone is dying, he's going to be there. And that's alright when you are a church of 200-300 people, but not when you are close to 1,000 people, which is where we were then. (Interview 2)

Once Incumbent-A had discussed the matter with the state overseer, he also met with the church council to discuss the pastoral transition. A two-year transition process was decided upon and the council was given the opportunity to confer and give feedback regarding the transition plan. The plan itself had essentially been formed through the previous meeting of Incumbent-A and Overseer-A. Following the feedback from the church council, the congregation was informed of the impending retirement of

Incumbent-A as well as the transition of the senior pastorate to Successor-A over a two-year period.

### ***Successor Selection***

While within the COG the state overseer has the authority to appoint a pastor to the local church, the congregation affirms that appointment through a congregational vote. Stone refers to this as a “hybrid model of succession” (Stone 2010). In the case of Church-A, Overseer-A allowed Incumbent-A to choose the successor. Overseer-A indicated that this selection was based upon the recommendation of Incumbent-A: “I know he [Successor-A] had never pastored before. He [Successor-A] had seen [Incumbent-A lead] and had been mentored well enough that the pastor felt safe in turning [the leadership of the church] over to him. [Successor-A] was doing an excellent job filling the assignment where he was and that’s always a good sign” (Interview 3).

With regard to the process of selecting a successor, Successor-A had a limited role. He continued to work in his role as associate pastor prior to the transition with limited involvement in the dialogue between Incumbent-A and Overseer-A. Successor-A states,

I don't know that I played much of a role. I would say in those seven years of being on [Church-A's] staff, I played my role by having a good work ethic. I connected with people and I never did think that I would be the pastor. I did my job. I just ministered among the people and when the time came there was just such a good relationship that I had with them that they said, “We don't want to go look anywhere [else].” (Interview 2)

### **Succession Contingencies**

Through the recommendation of the pastor and the church council, Church-A decided on a two-year transition plan. The first year of the process, Incumbent-A led the



church council and helped to oversee the operational and financial departments of the church. Successor-A gradually assumed more preaching and pastoral responsibilities. “After things started moving well, I [Incumbent-A] moved to [a different state] in [name of city] with my little family. I came back to [Church-A] once a month. I took care of the business. . . . I would preach at [Church-A], visit, make calls, look at the finances, do all those kind of things, and spend some time with [Successor-A]” (Interview 1).

### ***Mentoring***

As the two-year transition began, Successor-A was mentored by Incumbent-A for the role of senior pastor. Incumbent-A indicated that Successor-A “continued to develop as a pastor and showed many good signs of being a good pastor, good preacher, and good administrator. I continued to turn things over to him to the extent that I didn't have to worry about it because [Successor-A] came into his own. I think all of us saw that he was ready for the work” (Interview 1). During the transition process, Incumbent-A remained in the position of senior pastor, however, Successor-A led primarily in the shepherding role. “I [Successor-A] was preaching from the pulpit and covering all the hospital visits and all the funerals” (Interview 2).

The role of the state overseer during the two-year transition was limited. Once he had agreed to the transitional process, virtually everything else took place at the local church level. “I [Overseer-A] just simply [completed the transition process] through conversations and phone calls and inquired how things were going from his [Successor-A's] perspective” (Interview 3).

### ***Ceremonial Installation***

As the transitional period came to a close, Incumbent-A contacted Overseer-A and indicated that the church was ready to make the transition complete. The state overseer visited the church in late December of 2001 and took a pastoral preference vote with Successor-A being the only name on the ballot. Successor-A received 94% of the vote. Thirty days later in January of 2002, Overseer-A returned and installed Successor-A as the senior pastor and installed Incumbent-A as the pastor emeritus. Incumbent-A relinquished all leadership responsibilities and Successor-A assumed the full duties of the pastorate. The pastor emeritus position assumed by Incumbent-A was essentially a position of honor with no formal responsibility. Overseer-A recalled, “Having the installation service of both men into their assigned areas gave the people not only an understanding of what their role would be, it helped them to see who they would turn to for particular things” (Interview 3).

### **Succession Consequences**

Once the succession process was complete, Church-A continued to increase in both attendance and finances. Incumbent-A stated,

The church has continued to do well, breaking records continually. . . . The tithe has probably doubled and the membership has increased by almost 900. It has just continued on and upward. We felt like and still feel like we did the right thing. It wasn't the COG way ten years ago. (Interview 1)

When asked about the strengths and weaknesses of the relay succession at Church-A, both Incumbent-A and Overseer-A felt a great strength of the succession was that it provided a smooth transition from one pastor to the next. They understood that the incumbent and successor had different gifts and abilities, but the mission of the church remained virtually the same during and after the time of transition, which they saw as a

great positive. They indicated they were unable to identify any weaknesses in the transition.

Likewise, Successor-A felt the succession overall was very positive and assisted Church-A to continue ministry efforts without fear of an unknown leader coming in and changing the missional direction of the church. Regarding weaknesses, Successor-A indicated that the length of transition seemed to be longer than what may have been needed. He stated, “I think two years was probably too long. . . . Maybe that is what it had to be because at the time we were doing this we were breaking new ground here in the Church of God” (Interview 2). He further stated,

It was difficult on he [Incumbent-A] and I, and it was difficult on the staff because they didn't know who they were working for. They were reporting to me, but he was still the boss. That was difficult for them and that was difficult for my relationship with them because I knew that not only did I have to make him happy, I had to keep them happy because I knew he was talking to them. For example, [Incumbent-A would ask the staff,] “How's it going? How do you like working for him?” There was a time or two that [the staff] needed to be corrected; I just had to be very, very, careful. (Interview 2)

Since the completion of the relay succession at Church-A, Successor-A has continued to serve as senior pastor. There was a commitment on the part of the church that there would be some compensation for Incumbent-A for a period of five years post-succession. Successor-A ensured that the compensation of Incumbent-A took place. Incumbent-A has since initiated another relay succession at a smaller church in the same state and been active in missions work in South America. The state overseer, Overseer-A, has retired from full-time ministry but continues to raise awareness and funds for foreign missions efforts. A summary of the research findings for Church-A can be found in Table 2.

Table 2. Narrative summary for Church-A

Church Designation	Category	Summarized Responses
Church-A	Succession Antecedents	<ol style="list-style-type: none"> <li>1. Incumbent-A desired to retire.</li> <li>2. Incumbent-A desired to transition to ministry outside the pastorate.</li> </ol>
	Successor Origin	<ol style="list-style-type: none"> <li>1. Successor-A served as an associate pastor at Church-A for 9 years.</li> <li>2. Incumbent-A chose Successor-A to serve as the next senior pastor.</li> <li>3. Overseer-A met with Incumbent-A but did not choose the successor.</li> </ol>
	Succession Contingencies	<ol style="list-style-type: none"> <li>1. Church-A decided on a 2 year transition plan.</li> <li>2. Successor-A was mentored by Incumbent-A.</li> <li>3. Overseer-A installed Successor-A as pastor in a ceremonial service.</li> <li>4. Overseer-A installed Incumbent-A as pastor emeritus in the same service.</li> </ol>
	Succession Consequences	<ol style="list-style-type: none"> <li>1. Attendance at Church-A continued to increase.</li> <li>2. Tithe income at Church-A continued to increase.</li> </ol>

***Church-B***

Church-B began in 1952 in the mid-Atlantic region of the United States. It had four pastors serve in leadership in its first eighteen years. In 1970, with the church

hovering around 32 members, Incumbent-B assumed the role of senior pastor and served for over three decades. Prior to becoming the pastor at Church-B, Incumbent-B served as an evangelist.

I had a philosophy back then, but I'm not so sure that I stand on it today after years of experience. My philosophy back then was while I am going to school, there would be hundreds of souls that could be lost if I failed to minister. So, I just decided reach those souls. I evangelized and sang. That's how my ministry began. I was an evangelist. At first, I was part-time and then full-time. (Interview 4)

Over the years of Incumbent-B's tenure at Church-B the church grew both in membership, attendance, and facilities until, at the time of pastoral succession, there were approximately 1,400 members and approximately 1,000 people in regular weekly attendance. In 1992, Successor-B joined the staff at Church-B in an associate capacity. He served in various roles within the church for approximately 15 years before assuming the role of senior pastor.

### **Succession Antecedents**

Incumbent-B was the son of a pastor. He shared that his father was a long-term pastor who he felt lost effectiveness because age seemingly limited his ability to adequately minister to the congregation.

My father was a great minister, but he just held on too long as a pastor. Trying to hold on to a church when his age was preventing him from doing effective ministry, affected his church tremendously. He never planned on retiring. He said he told God he would never retire. I never told God that. So, when I felt the time was right, I retired from pastoring, but I'm still going strong in a number of different areas of ministry. (Interview 4)

The experience of his father led Incumbent-B to contemplate a planned succession at Church-B.

I knew I was getting older. I was in my late 60s. My health was good, however, I knew the reality was that I could not continue at a strong pace forever. God had blessed [our church]. We had a lot of ministries within the church and a lot of

outreach ministries. We were a very busy church. I wanted to keep the spark alive at our church. I wanted things to always be fresh for my people. I had to start thinking about the fact that I would not always be able to give what my people deserved. I would want to, but reality was facing me and I knew I could not. I had seen others before me reach a certain age and begin to lose ministry effectiveness and would not step aside. My love for ministry was still there. My love for organization was still there, but my future at the church concerned me. (Interview 4)

As Incumbent-B thought about a relay succession, one of his main concerns was the care of the people under his leadership. Within the COG, state overseers are only allowed to serve in that capacity for a period of up to twelve years, at which time they must serve in a different role before being eligible to serve as a state overseer once again. Incumbent-B was concerned that an appointment would be made to Church-B that would place a former state overseer there for a short period of time until that leader was eligible to become a state overseer again.

I knew I could call our denominational headquarters and they would probably send someone coming from a position of state overseer, but I didn't want a person coming out of that position who would possibly only spend two years. They could very easily return to a state overseer position. I didn't want somebody to be sent that was only going to spend a short period of time. I wanted somebody who could love the people, take care of the people, and help them grow. One who would take them higher than what I could. (Interview 4)

A second reason Incumbent-B opted for a relay succession was his concern that Church-B was an aging congregation and a younger pastor would have the opportunity to minister among the people for a greater length of time. "I wanted somebody younger, too, because reality is that the average age of the congregation in the church is usually ten years above and ten years below the age of the pastor. I wanted somebody younger that could be there for a while and help grow the church into a greater ministry" (Interview 4). He felt someone younger, however, would need mentoring and development to understand the intricacies of Church-B.

## ***Prayer***

Incumbent-B began a season of prayer, seeking God for wisdom for the next steps Church-B should take with regard to leadership. He indicated that as he began contemplating who would be the next leader of the church, his initial choice was not Successor-B. As he continued praying, however, he noticed a change in Successor-B's heart.

I noticed that he [Successor-B] began to have a passion for the people. It seemed as though God began to change his thinking and his heart. I began to notice this difference. It was more than just being a staff member. He was beginning to be concerned about the people's needs and had a passion for them. I picked up on that fact. This caused me to begin thinking about [Successor-B].

## **Successor Origin**

During this time of prayer, Incumbent-B did not discuss his thoughts with the church council, Successor-B, or the state overseer, Overseer-B. Once he had settled on Successor-B as the potential successor, he met with Overseer-B to discuss the concept of a relay succession with Successor-B as the potential successor.

I had a long talk with [Overseer-B], who is a very good friend of mine. I began to share with him my need to make a personal change. He told me he would be willing to work with me. It makes things a lot easier to have a state overseer who is willing to work with you. I personally feel that was one of the key points in the process. [Overseer-B] knew I had a passion for the people. He asked, "How do you want to work it?" I told him I had in mind [Successor-B], and he agreed. I relayed the fact that I had not told [Successor-B]. He told me to come back and let him know when I made my final decision. (Interview 4)

Overseer-B had great respect for the ministry efforts and number of years that Incumbent-B had served Church-B. This allowed him to have confidence that the plan outlined by Incumbent-B was in the best interest of the church. "I allowed the pastor, who knew the congregation and had been there for thirty years, to help guide the process.

I served in somewhat of a secondary role of support, encouragement, and agreement” (Interview 6).

Once the Overseer-B had agreed to the concept of a relay succession, Incumbent-B met with Successor-B to discuss the possibility of Successor-B becoming the senior pastor.

Then I met with [Successor-B]. He and I sat down at a Wendy’s [restaurant] across the table from one another after a visit to a school for handicapped children. I think I laid a great burden on him that day. I said to him, “[Successor-B], I cannot continue a very long time being pastor. That’s reality.” I said, “So I’m going to have to retire some time. When I do I would like for you to be the one to follow me.” I’ll never forget that day. He sat back in his chair and didn’t say a word. All of a sudden you could see his facial expressions change. I said, “That feeling you have right now, you will have from now on. You just picked up the burden or, in other words, the mantle.” (Interview 4)

Successor-B expressed some reluctance initially, but agreed to privately pray about becoming the next pastor at Church-B. Incumbent-B and Successor-B met again the next week. Successor-B stated, “I’ve done a lot of praying about it and a lot of thinking about it. I’ll consider it on one condition. That condition is that you do not buy a Winnebago or a big camper and start running around the country. You will stay with me for one year and mentor me” (Interview 4). Incumbent-B agreed to stay at the church one year after the transition and continue to mentor Successor-B. Incumbent-B stated, “I thought it was a tremendous thing on his [Successor-B’s] part for him to request that I mentor him” (Interview 4).

### **Succession Contingencies**

Once Successor-B agreed to become the next pastor at Church-B, both Incumbent-B and Successor-B worked out a process with Overseer-B. Incumbent-B considered the process of the relay succession to be very important and had not yet



informed the congregation of his intention to retire. “The procedure was very important to me. I did not want the people to know that I was leaving. No one knew that I was even considering it. I knew there would be a heavy drop in our number of members like other churches if we did not handle [the succession] carefully” (Interview 4).

### *Collaborative Effort*

Successor-B indicated that his initial role in the early stages of the succession planning was “to be a staff pastor and to be there and available.” Later, the succession planning effort became very collaborative. “We both brought resources to the table of models of succession that we had in our minds. . . . The timeline was developed by [Incumbent-B] and the components of it were birthed out of conversations that we had with each other and then we just simply put that into play” (Interview 5). Successor-B further stated,

We exchanged matters privately for a number of months where we met privately. The logistics of the succession occurred in some very productive, very clear strategic private planning. And then there was the process. The next step was engaging the people through a succession of releasing this information to leadership, staff, eldership, and the congregation at large; it was very much like a relay. We were in an exchange zone. He had the baton. I'm slowly matching pace. One of the things that I asked to be able to do was to establish a metaphor of ministry transition as a marathon relay. So, we talked about the metaphor of a marathon race and how we were a team and how there was a pastor before him and there were pastors before that pastor. And, for better or worse, each pastor entered an “exchange zone” and either fumbled the baton, made a mess of it, or had to collect it again and get back on track. We didn't want to fumble the baton so the idea was that we would work diligently so that there was a smooth handoff—that I would match his pace. He then started to back off, and I started stepping up. I started to take more authority and leadership as he released more authority and leadership to me. In doing so, I was matching pace. And even after the transition happened, he didn't let go. We kept that in place for a while until we both felt like it was more appropriate for him to kind of let go and let me to start running on my own. So, the process—the decision to take on the role of pastor, the logistical planning, the transition planning, the enfranchising of the leadership and congregation—was private, that is, until that critical time in the “exchange zone” when it was necessary to pass the baton successfully. (Interview 5)

Church-B has an annual business meeting in January of each year. Prior to the business meeting in 2006, Incumbent-B shared his intentions to retire with the finance committee and the church council. He also invited the state overseer, Overseer-B, to be in attendance. When the business meeting occurred in 2006, Incumbent-B shared with the congregation his intention to retire:

We went ahead and had our business meeting just like we normally would and, at the end of the meeting, I'll never forget it, I had a stool and I leaned back on the stool and said, "By the way folks there is one other thing I want to tell you today. This will be my last year as your pastor." I continued, "I'm not planning on going anywhere." That statement changed the atmosphere a little. Then I told the congregation that I would like for them to consider [Successor-B] to be my successor. When I told them my choice, they gave a standing ovation. That made me feel fabulous because that made me feel like the people would agree with my choice. When I finished making my remarks, [Overseer-B] moved to the pulpit. He stated, "With a formal recommendation from your pastor and your church council, I'm submitting to you the name of [Successor-B] to become your pastor when [Incumbent-B] retires. If you are in agreement to this, would you please stand." The people all stood once again. That was it. [Overseer-B] handled it beautifully. (Interview 4)

### ***Transitional Period***

There was approximately one year of transition in which Incumbent-B maintained the title and responsibilities of the senior pastor. Starting in January 2007, Incumbent-B released authority to Successor-B to fulfill various pastoral functions. Successor-B stated that he "shadowed [Incumbent-B] through his day. After his meetings, we would often meet privately, and he would coach me, inform me, and educate me as to the way in which the church works and who does what and what role they play. So, there was a lot of personal tutelage during the process" (Interview 5). The formal transition culminated in January 2008 with Successor-B being installed as the senior pastor and Incumbent-B being installed as the pastor emeritus. Successor-B

recalls, “As soon as that happened we met often. [Incumbent-B] was very much a part of the post-transition. He stayed on in a consultant’s role for a year and a half or more” (Interview 5).

### **Succession Consequences**

Once the succession process was completed, Church-B experienced approximately a 15% decrease in attendance and giving according to Successor-B. According to all three leaders interviewed, however, the church remained healthy and vibrant and this decrease was attributed to the loss of a music pastor just prior to the time of transition. The church has since recovered and has increased numerically and financially beyond pre-succession statistics.

Overseer-B indicated that he was not aware of any weaknesses in the succession plan at Church-B. His opinion was that this is a model for churches where a pastor has very detailed information about the church because he has served that church for a long period of time. Incumbent-B also felt that the succession plan was a very healthy means to transition the pastorate at Church-B. Successor-B indicated that while he felt the transition went very well, he also felt that he leveraged some changes to worship services and ministry outreaches too soon after the transition, which caused some minor challenges. But, these changes were quickly remedied. A summary of the research findings for Church-B can be found in Table 3.

Table 3. Narrative summary for Church-B

Church Designation	Category	Summarized Responses
Church-B	Succession Antecedents	<ol style="list-style-type: none"> <li>1. Incumbent-B desired to retire.</li> <li>2. Incumbent-B felt that his age could be a limiting factor in performing effective pastoral ministry.</li> </ol>
	Successor Origin	<ol style="list-style-type: none"> <li>1. Successor-B served as an associate pastor at Church-B for 16 years.</li> <li>2. Incumbent-B chose Successor-B to serve as the next senior pastor.</li> <li>3. Overseer-B met with Incumbent-B but did not choose the successor.</li> </ol>
	Succession Contingencies	<ol style="list-style-type: none"> <li>1. Church-B decided on a 2-year transition plan.</li> <li>2. Successor-B was mentored by Incumbent-B.</li> <li>3. Incumbent-B and Successor-B planned the details of the succession plan together.</li> <li>4. Overseer-B installed Successor-B as pastor in a ceremonial service.</li> <li>5. Overseer-B installed Incumbent-B as pastor emeritus in the same service.</li> </ol>
	Succession Consequences	<ol style="list-style-type: none"> <li>1. Attendance at Church-B declined slightly in the 2 years post-succession.</li> <li>2. Tithe income at Church-B declined slightly in the 2 years post-succession.</li> </ol>

### ***Church-C***

Church-C was started in 1968 in a metropolitan area of the mid-Atlantic region of the United States by Incumbent-C. Incumbent-C became a Christian when he was sixteen years old and had a strong desire to serve the Lord. “I went to [Bible college] for a couple of years. There, I got all the knowledge I could get. I had such a burden for the work of the Lord, and I really felt the calling to the Lord” (Interview 7). Before becoming pastor at Church-C, Incumbent-C served as a foreign missionary and leader in educational ministry.

Church-C experienced a period of growth under Incumbent-C’s leadership. A Christian school was eventually established as part of the church as well as an adult learning center. Under his leadership the church acquired approximately forty acres of property, built a new facility, and welcomed approximately 200 worshipers per week near the end of his tenure.

### ***Successor Antecedents***

Successor-C came to Christ when he was in high school, sensing then that the Lord was calling him to vocational ministry. As he prayed about this opportunity, he sought counsel from his father-in-law, Incumbent-C. He said,

My father-in-law played a vital role in me accepting the call [to ministry]. He encouraged me. He came to me at a camp meeting one time. This was when I was really struggling with am I or am I not called. He came to me during a camp meeting and said to me that he really felt like I needed to take a step of faith. I was working a secular job at that time and the reason I really took that as from the Lord is because it was unlike him to suggest somebody quit their job. He is very practical and down to earth. I quit my job and began to really fast and pray and seek the Lord and it was through that that I began to knock on some doors and preach in other places. (Interview 8)

Successor-C served as a youth pastor at Church-C for approximately 8 years. In 1988, Successor-C left his youth pastorate position and was sponsored by Church-C to plant a church in the previous building used by Church-C before they built a new worship facility at their current location. He served in this capacity until December of 1996 when the building burned due to an electrical fire. At about the same time, Incumbent-C was nearing the age of retirement and, according to him, Successor-C was the best candidate to serve as successor. The fire destroyed the building and Successor-C's congregation was offered a warehouse space in which to meet. Incumbent-C stated,

They were thrust into a warehouse for services with no air conditioning, no windows. Summer was coming on, and I knew that it would be too hot. I knew that if I did not rescue them from that [situation] and rebuild the church building, no one would come and take over my work. So, I was not really ready to retire, but I knew I was old enough to retire. So [Successor-C] and I prayed about it and talked about it, and we came to a decision [to initiate a relay succession]. (Interview 7)

### ***Successor Origin***

The congregations of the two churches began meeting together in early 1998 with Incumbent-C serving as pastor and Successor-C serving in an associate capacity. During this time Successor-C spent time interviewing the leaders in the church and seeking to understand further the administrative and spiritual leadership of the church. It seems that Successor-C was given more latitude to help form the succession plan since he was related to Incumbent-C. Incumbent-C and Successor-C both indicated, however, that they sensed this was God's plan for Church-C. Successor-C stated,

My wife and I both came up with a merging plan that we had talked over with [Incumbent-C], which would entail us talking to the leadership of [Church-C], interviewing them, finding out what their likes and dislikes were and if they wanted to continue ministering. We didn't want anyone to feel as though we were coming in like a tidal wave and taking over. We knew a lot of these people from our ministry experience with them previously. So, we really meticulously and methodically interviewed people, met with people, met with the church council, and

met with the entire congregation. Our role became that of an interviewer and comforter. We wanted to know about the future and where things were headed. (Interview 8)

### *Succession Contingencies*

The relay succession culminated in June of 1998 with Successor-C becoming the senior pastor and Incumbent-C assuming the title of pastor emeritus and continuing with responsibilities to lead the church's affiliated school. Successor-C stated,

We wanted to portray to the congregation that this was something that was desired by both parties. This wasn't something that was happening to oust the lead pastor. There wasn't necessarily a specific need at that moment. We just saw this as a divine opportunity and a divine moment that God had created. So we wanted to make sure that the people understood that God was authoring this [transition]. Secondly, we also wanted to portray strength in unity with the pastor who was handing over [his responsibilities]. We felt like that was very important. To illustrate that, we had a torch that [Incumbent-C] had. He stood and addressed the congregation. We had the preliminaries of the service, but then we had this segment where we wanted to really illustrate the change. He addressed the congregation, gave his thoughts, and then handed the torch to me. I came and knelt with my wife, and he laid his hands on us, prayed over us, and handed us the torch. The people stood and applauded, and then I addressed them. We wanted to handle [the transition] very carefully in the beginning. (Interview 8)

The role of the state overseer, Overseer-C, was to serve as a mediator and counselor to the two pastors during the relay succession. He recalled,

Even though they were related, there's always apprehensions about how is this going to work out as time passes. [Incumbent-C] may wonder, "As pastor emeritus, what kind of freedom will I really have to turn this loose"? So, [my role] was one of reassuring him [Incumbent-C] and helping to encourage him to believe that this indeed could be a plan from God. My role was also to encourage [Successor-C] to always honor his supervising pastor, his father-in-law, build him up, stay on the same page. If he ever saw any problem creeping up, he needed to get together and talk about it and resolve the potential dangers that they could face. (Interview 9)

In addition, Overseer-C felt his role was to give assurance to the congregation that the relay succession plan was not reactionary due to the circumstances of the fire, but was God's plan at work in the church. He stated, "I came to let the church know that I was

endorsing this and believed that it was a situation where all things work together for the good to them who are called according to his purpose” (Interview 9).

Once the succession plan was executed, Successor-C assumed all of the responsibilities of the pastorate. Incumbent-C took a several month extended leave to allow Successor-C the opportunity to establish himself as the pastor. Once Incumbent-C returned, he continued to minister periodically at the church, serve as counselor to Successor-C, and carry on his responsibilities at the school.

### *Succession Consequences*

Church-C continued a pattern of growth in terms of finances and attendance after the succession occurred. “We saw an immediate impact and growth in both finances and attendance. That [growth] continued over the next several years until now, but the first two years saw the most positive impact” (Interview 8). Since the time of the relay succession, the church has built a new worship facility to accommodate the growing congregation. They have also facilitated the plant of another church in the area.

The three informants at this church indicated they could not identify any weaknesses to the relay succession plan used to transition from Incumbent-C to Successor-C. They felt the strengths were that it allowed the church to continue to minister with a leader with whom the congregation was already familiar. Overseer-C indicated that both the incumbent and successor had a good doctrinal understanding of the local church and that assisted in facilitating a smooth transition. A summary of the research findings for Church-C can be found in Table 4.



Table 4. Narrative summary for Church-C

Church Designation	Category	Summarized Responses
Church-C	Succession Antecedents	<ol style="list-style-type: none"> <li>1. Incumbent-C decided to retire.</li> <li>2. Church-C's church plant had a devastating fire and they needed a place to continue worshipping.</li> <li>3. The churches decided to merger together.</li> </ol>
	Successor Origin	<ol style="list-style-type: none"> <li>1. Successor-C served as youth pastor for 8 years, pastor of church plant for 10 years, and associate pastor for 6 months.</li> <li>2. Incumbent-C chose Successor-C to serve as the next senior pastor.</li> </ol>
	Succession Contingencies	<ol style="list-style-type: none"> <li>1. Church-C decided on a 6-month transition plan.</li> <li>2. Successor-C was mentored by Incumbent-C.</li> <li>3. Incumbent-C and Successor-C planned the details of the succession plan together.</li> <li>4. Overseer-C installed Successor-C as pastor in a ceremonial service.</li> <li>5. Overseer-C installed Incumbent-B as pastor emeritus in the same service.</li> </ol>
	Succession Consequences	<ol style="list-style-type: none"> <li>1. Attendance at Church-C increased in the 2 years post-succession.</li> <li>2. Tithe income at Church-B increased the 2 years post-succession.</li> </ol>

### *Church-D*

Church-D was established in the mid-20th century. Incumbent-D became pastor in 1967 with fewer than 20 people in attendance. Prior to becoming pastor at Church-D, Incumbent-D served as an associate pastor at a local church near where he was raised. Speaking of his calling to ministry, Incumbent-D stated, “I just felt like the Lord was calling me into the ministry and so one of the workers down at the church where I was attending at the time asked me if I would get up and speak. Once I spoke the first time, I felt the anointing of the Spirit and since that time I began to speak even more” (Interview 10).

### *Succession Antecedents*

Church-D experienced a period of steady growth under Incumbent-D’s leadership. The church expanded ministries and facilities and grew to over 200 people in regular weekly attendance by the time Incumbent-D was thinking about retirement. Regarding his retirement, Incumbent-D stated, “I was getting to the age of retirement, and I had been there for over 32 years. When we went there they only had about 17 people. So, we were there for a long time and it was almost like family to us. In fact, it is still like family to us. But, I felt like it was time for me to retire. I retired from pastoring, not from the ministry” (Interview 10).

Incumbent-D contacted the state overseer, Overseer-D, to discuss his retirement. Although he had not spoken with Successor-D formally about becoming the pastor at Church-D, Incumbent-D indicated to Overseer-D his preference that Successor-D become the next pastor. Overseer-D stated, “It was the pastor who initiated [the relay

succession]. I then helped [Successor-D] become part of the staff going through the credentialing [process]” (Interview 12).

### ***Successor Origin***

Successor-D attended Church-D as a young boy and grew up under the ministry of Incumbent-D. He went on to serve as a youth pastor and pastored in various churches throughout the United States. During his time in vocational ministry, Successor-D continued to maintain contact with Incumbent-D as a mentor and friend. Due to a death in his family, Successor-D returned to Church-D to attend the funeral. It was during that time that Incumbent-D was thinking of retiring. Successor-D stated,

[Incumbent-D] has a son who is also in ministry and, in the natural realm, I think everybody assumed that the succession would be handed down to him. He is very capable and a very good minister. In the spiritual realm, I think through a lot of prayer with [Incumbent-D] and [his wife], they felt that my wife and I were the ones that needed to come and take the church upon their retirement. After praying on our end, we felt that was what we were to do. (Interview 9)

While Successor-D was visiting Church-D, Incumbent-D spoke with him about becoming the next pastor. Successor-D stated,

[Incumbent-D] had asked me if I would consider taking the church when he retired. Jokingly, I told him he wasn't ready to retire, and he continued to pursue [a possible transition plan] with my wife and I. We both knew that it would have to be of the Lord because I was in [a different denomination] and, because I grew up in the church, I wanted to know if it was a decision that the people would be in favor of. So, in the course of a few weeks to a month, he actually held a meeting and brought it to the people. They called me and the people voted that they would be very pleased with that. In the course of another month or so, my wife and I resigned where we were and moved back. (Interview 9)

### ***Succession Contingencies***

Upon moving back to Church-D, Successor-D assumed the role of associate pastor for about a year. “I worked with [Incumbent-D] for about a year as the assistant

and youth pastor and then after a year he became the pastor emeritus and I became the pastor and then he worked with me for another year and a half in the transition stage” (Interview 11).

During the time of pre-succession transition, Successor-D served in various pastoral roles while also working with his wife in the areas of worship and youth. During the year leading up to the transition, Successor-D was there to assist Incumbent-D and begin the process of transition to senior pastor. He recalled,

I think, in my case, coming in for a year was a very good thing. It was a good time to relearn the personality of the church. The way they were used to doing things. The way they were accustomed to doing things and feeling that out to where, when I stepped into that role, I wouldn't just try to do something that worked some place else. (Interview 11)

The transition culminated in June of 1996 with Successor-D becoming the pastor and Incumbent-D becoming the pastor emeritus. Overseer-D visited the church to install Successor-D as the pastor. Overseer-D remembered,

I went personally to the church and realized that they were in favor of [the relay succession]. It received a very high vote [of confidence]. I don't remember the percentage, but I remember it was very strong. I don't think we lost anyone as a result of that change. The pastor was so appreciated and loved and respected by his congregation that they trusted his recommendation and then, when I came along and supported [the succession], they were pleased about that and it just seemed good to us and to the Holy Ghost for that appointment to be made. I followed up my visit by coming back after the vote was taken. I then went through an installation service for both ministers. Though [Incumbent-D] was going to be getting a stipend or some kind of an allotment, we appointed him to the position of pastor emeritus, and I went through the process of explaining to the church what that title entailed and gave them a full, complete understanding of what his rights and privileges were that he had earned as a result of his long tenure and the confidence that the people had in him. [I explained] that there would be no demands placed upon him by the church, but that he would be recognized and have the freedom to move among them as a minister, but not as a senior pastor. And that he, of course, would be under the leadership of [Successor-D]. After having installed him as pastor emeritus, we laid hands on him and anointed him for that role. Then, we moved to the installation of the pastor, explaining again his duties and responsibilities. Again, I called upon the leaders of the church to lay hands upon [Successor-B and his wife]. Thus, the

transfer of leadership was passed from one man to the other with God's approval. (Interview 12)

While Incumbent-D became the pastor emeritus, he also remained at the church for approximately 18 months to assist with the ministry and provide support as necessary. Successor-D recalled of the transition process,

He [Incumbent-D] was the pastor as long as he was the pastor, and I would submit to what he wanted and then, in turn, when I became the pastor, he became the pastor emeritus. He would submit to me as the pastor, and I think that was the real moment [when the church realized what had happened]. When the church saw the mutual respect we had for each other, they understood better [Incumbent-D's] role. To this day, when [Incumbent-D] comes to our church if he is ministering or visiting, we honor him very highly. That will continue as long as I am the pastor. (Interview 11)

### *Succession Consequences*

Church-D grew during and after the transitional time both in terms of finances and regular attenders. Attendance increased by approximately 50 people in the first two years after the relay succession. Subsequently, the financial standing of the church increased as well. "I [Successor-D] attribute a lot of [the growth] not to just doing things a little differently than what he [Incumbent-D] had done because a lot of his patterns are engrained in me. I think the church as a whole was ready to go to another level. The opportunity was there, and it just began to grow" (Interview 11).

Recalling strengths and weaknesses of the relay succession, Incumbent-D and Overseer-D both indicated that they could not recall any weaknesses of the succession plan. They felt the execution of the plan was beneficial to the local church and to both the incumbent and successor. Successor-D, however, felt that while the plan was an overall success, a two-year transitional period may be too long when the successor has

previous pastoral experience. A summary of the research findings for Church-D can be found in Table 5.

Table 5. Narrative summary for Church-D

Church Designation	Category	Summarized Responses
Church-D	Succession Antecedents	1. Incumbent-D decided to retire.
	Successor Origin	1. Successor-D attended Church-D as a young boy and later left to pastor churches in other locations. 2. Incumbent-D continued to have contact with Successor-D and eventually returned as an associate pastor. 3. Incumbent-D chose Successor-D to serve as the next senior pastor.
	Succession Contingencies	1. Church-D decided on a 2 year transition plan. 2. Successor-D was minimally mentored by Incumbent-D due to Successor-D's extensive pastoral experience. 3. Overseer-D installed Successor-D as pastor in a ceremonial service. 4. Overseer-D installed Incumbent-D as pastor emeritus in the same service.
	Succession Consequences	1. Attendance at Church-D increased in the 2 years post-succession. 2. Tithing income at Church-D increased the 2 years post-succession.

## **Relationship to the Research Questions**

In order to answer the research questions, a case study protocol was developed to guide the researcher in gathering information from each case study site (see appendix 3). The case study protocol included questions derived from the broad themes found in the literature review: succession antecedents, successor origin, succession contingencies, and succession consequences. As the information was gathered, mainly in the form of interviews, it was transcribed and coded to identify patterns of thought for each succession. The codes developed into general themes that aided in answering each research question. The following section will seek to describe each theme that was developed with “rich, thick description,” so as to allow the reader to make application to his or her particular context (Merriam 2009, 29).

### ***Findings Related to Research Question 1***

*What are the antecedents of a relay succession plan?* The research findings for succession antecedents followed three main areas of inquiry revealed in the literature review and articulated in the case study protocol: succession catalyst, role in plan formation, and successor development. The responses from each informant to the protocol questions under the succession antecedents heading were coded according to these three themes. The initial data analysis revealed the need for three sub-codes—retirement, desire for change in ministry, and growth beyond leadership style—to be added under the heading “Succession Catalyst” so that the researcher could determine what various informants understood as the initiating event of the succession. The other themes—role in plan formation and successor development—needed no such sub-codes

because the data was already divided according to the informant’s roles: incumbent, successor, or overseer.

### **Succession Antecedents**

The following section will profile succession antecedents. Table 6 shows the relationship between the category of succession antecedents, the protocol questions, and the themes used to code the acquired data. The information contained in this section will allow the reader to understand the events that happened prior to the relay succession events in each church.

Table 6. Succession antecedents: Relationship of protocol questions to excerpt codes

Category	Protocol Questions	Theme Codes
Succession Antecedents	1. What was the catalyst that initiated the succession planning process?	Succession Catalyst
	2. Discuss your role in the formation of the relay succession plan at your church.	Role in Plan Formation
	3. How was the successor developed to fill the role of the incumbent pastor?	Successor Development

### ***Succession Catalyst***

The first theme, succession catalyst, sought to understand the event or events that brought about the initial discussion of a relay succession plan. The case study protocol specifically asked, “What was the catalyst that initiated the succession planning



process?” Three main catalysts were discovered as informants responded to this question: retirement, desire for change in ministry, and growth beyond leadership style (see Table 7).

Table 7. Succession catalyst:  
Frequency of coding

	Retirement	Change in Ministry	Growth Beyond Leadership Style	Totals
Interview 01	2	2	0	4
Interview 02	3	0	2	5
Interview 03	1	0	0	1
Interview 04	4	0	0	4
Interview 05	0	0	0	0
Interview 06	1	1	0	2
Interview 07	1	0	0	1
Interview 08	0	0	0	0
Interview 09	0	1	0	1
Interview 10	4	0	0	4
Interview 11	5	0	0	5
Interview 12	1	0	0	1
Totals	22	4	2	30
% of Total	79	15	6	

**Retirement.** Retirement was listed as the main factor in initiating a relay succession plan for all churches studied. It had the highest level of sub-coding under the node for succession catalyst with this code occurring 79% of the time. Each incumbent pastor was between the ages of 60 and 70 when they began to consider a planned succession. They indicated that they saw succession as the next step in providing care for

the congregations they served. They felt their increasing age could preclude them from fully engaging in the pace of pastoral work, but their heart to serve the people beyond their tenure was evident. Incumbent-B's thoughts were typical: "I didn't want somebody to be sent that was only going to spend a short period of time [at the church]. I wanted somebody who could love the people, take care of the people, and help them grow. One who would take them higher than what I could" (Interview 4).

While all of the incumbent pastors communicated that they were in good health, they realized that their age could be a limiting factor in adequately performing their ministry responsibilities. The following comments are excerpts that were typical of the informant's responses:

Having pastored here for seventeen years and realizing that I was getting older and maybe desiring to do something else, I felt like it was time to commence a transition. (Interview 1)

What was the catalyst? He [Incumbent-A] had been serving the church for nineteen years and, though he could have stayed [at Church-A] as long as he wanted to, when he decided that he was going to retire that was the spark that made us know we needed to do something. (Interview 2)

I knew I was getting older. I was in my late 60s. My health was good, however, I knew the reality was that I could not continue at such a strong pace forever. (Interview 4)

I felt like it was time for me to retire. (Interview 10)

**Desire for change in ministry.** Although retirement was listed as the primary reason for the incumbents initiating a relay succession plan, they did not consider their retirement to be a change in calling or ministry effectiveness. All of the incumbents continue to remain active in ministry. Incumbent-A has since pastored another church and continues to raise awareness and financial support for world missions. The other incumbents continued in various evangelistic ministries. It is also worth noting that all of

the incumbents seemed to remain in some type of active ministry within the church where they initiated the relay succession. Several excerpts provided insight into the incumbent's desire for a change in ministry:

I've had a longing to work in missions. I didn't know that I would get involved in world missions. Although we were tremendously involved in supporting world missions [when I was pastor at Church-A], I think I just wanted to get out of full-time pastoral work. (Interview 1)

In one of those periods of time when we started the discussion of [Incumbent-B's] future he was coming to a place in his role that he felt like he wanted to do other things beyond being the pastor of the church, which was a demanding cycle for him and, at his age—which I think was about 67—he did not want to see himself at 70 years of age in a pastoral role. (Interview 6)

I retired from pastoring, but not from the ministry. (Interview 10)

**Growth beyond leadership style.** The final catalyst mentioned for initiating a relay succession plan was growth beyond leadership style. This was mentioned in only two of the churches studied as a less significant reason for beginning the succession planning process. All of the churches studied experienced substantial growth under the tenure of the incumbent pastor. At the time when the incumbent assumed the pastorate, the churches averaged regular worship attendance from a low of 17 people at Church-D to a high of 32 people at Church-B. When they retired, the average attendance had grown to almost 200 people at Church-C and to over 1000 people at Church-B. It is also noteworthy that the incumbents did not mention this as a reason for initiating the succession plan. It was mentioned by the successor and overseer in both cases where this theme was coded. The following excerpts indicate some of the informants's responses:

I think [Incumbent-A] would say, and I've heard him say, one of the catalysts in his decision to retire was that the church had grown beyond his style of pastoring. (Interview 2)

He [Incumbent-A] is hands on. If somebody is sick, he is going to be there. If someone is dying, he's going to be there. That's not a problem when you are a couple hundred members, but when you are close to 1000 members, which is where we were then, it could be very difficult. (Interview 2)

By this time, [Church-C] had built a new church and it was a heavy liability to them. [Incumbent-C] was really struggling to meet their obligations. (Interview 9)

### ***Role in Plan Formation***

The informants's roles in the plan formation was the second theme developed through the protocol. The relay succession plans at each church were a collaborative effort that were initiated by the incumbent pastor. In each of these cases, once it was determined to begin forming a succession plan, the state overseer was consulted and then a conversation took place with the identified successor. While the incumbents, successors, and overseers all provided insight to help form the succession plans, the incumbent pastors were responsible to lead and execute the plan in each case.

**Incumbent's role.** Although each case in this study had various nuances, a consistent finding was that the incumbent pastor played the primary role in each succession plan. None of the succession plans were initiated or led by the constituency of the church. In fact, Church-B did not even inform the congregation or church leadership until after a plan had been agreed upon by the incumbent, successor, and overseer. In reference to his role in leading the succession plan, Incumbent-A stated, "You've got to get your church ready, you've got to get your [successor] ready, and you've got to be ready" (Interview 1). In addition, none of the incumbent pastors were asked to relinquish their roles by either the church's leadership or the denomination's leadership. It was consistently the incumbent's decision of when and how to institute the relay succession

plan. The following examples indicate the incumbent's role in the formation of the relay succession plan:

I [Incumbent-A] met with our council and revealed my plan to them, which involved a two-year training program for [Successor-A]. (Interview 1)

It was the [incumbent] pastor that came with the recommendations, and they were all very sound. (Interview 3)

The timeline was primarily developed by [Incumbent-B]. (Interview 5)

**Successor's role.** For most of the churches studied, once the successor had been chosen, he was brought into the process of designing the parameters of the succession plan. Successor-B stated,

We both brought resources to the table of models of succession that we had in our minds. We shared them with each other and ultimately came up collaboratively with a timeline. The timeline was developed by [Incumbent-B] and the components of it were birthed out of conversations that we had with each other. We then just put [the timeline] into play. (Interview 5)

Successor-C was highly involved in the formation of Church-C's succession plan. It may be that the incumbent allowed Successor-C more liberty in the plan formation since they were related to one another. Successor-C stated that he and his wife came up with the succession plan and presented it to Incumbent-C for review and approval to implement. Conversely, Successor-A had very little involvement in putting together the plan at Church-A. "I didn't have a big role other than when they would occasionally ask me, 'We would like to do this, are you interested?'" Beyond that, I didn't really set any parameters and didn't feel like I was in any position to set any parameters. I was humbled and still am by the trust of those involved" (Interview 2).

**State overseer's role.** The role of the state overseer was fairly consistent throughout all four cases. The state overseers primarily served as counselors throughout

the initiation, formation, and implementation of the succession plan. They all agreed that the incumbent was the primary one to lead the relay succession and that their role was to give public approval to the process and successor. One overseer stated, “My role was just simply to give agreement to begin the succession and to [assist with] a timeline as to how this would happen” (Interview 6). Another stated, “I think the importance to my position was to not allow myself to be pressured into making [the relay succession] happen, but to allow God to do whatever it was he wanted to do with that local church” (Interview 12).

### ***Successor Development***

As the precedent literature showed, one of the reasons for a relay succession is to allow the incumbent and successor to run in tandem for a period of time so the successor is prepared to face the unique challenges of the organization they are going to lead (Vancil 1987b, 1). In the cases studied, the successors brought various levels of pastoral experience. One successor had served over 11 years as a senior pastor while others had no experience at all as senior pastors. In three of the cases, the incumbents saw the transitional period as necessary for the congregation to accept the new leader and for the successor to develop the necessary skills to effectively lead the church.

When questioned about the process of successor development, Incumbent-A stated, “I wasn't getting ready to get out of this world, but I was getting ready for other things in life and, in doing that, I was going to do everything I could to get [Successor-A] and the church ready for the transition” (Interview 1). Likewise, Incumbent-B also felt a burden to help prepare Successor-B, “If he had any question at all, he would come and talk to me. Before I handed the baton over, I tried my best to fill him in on everything”

(Interview 4). In Church-D, the successor had served for several years as a senior pastor at another church prior to becoming a staff pastor there. Incumbent-D seemed to feel less pressure than the other incumbents to prepare Successor-D for the senior pastorate. Regarding Successor-D, he stated, “He was ready. He was well-equipped. In fact, he not only went to college, but he had pastored about three different churches before he became pastor [at Church-D]. So, he was an experienced pastor” (Interview 10).

### **Data Summary for Research Question 1**

At each of the four case study sites, retirement from pastoral ministry was the overwhelming reason for initiating a relay succession. Out of 30 codes for the succession antecedent category, retirement was coded at a rate of 79%. While desire for change in ministry and growth beyond leadership style were both mentioned as contributing factors for succession, it was clear through the interview and data analysis that these were not the primary factors. When asked the question, “What was the catalyst that initiated the relay succession?” each informant mentioned retirement first. In addition, desire for change in ministry and growth beyond leadership style was only mentioned in 5 out of the 12 interviews.

When asked to discuss his role in the formation of the relay succession plan, the role of the incumbent was identified by the informants as being primary. In each case, the incumbent pastor was recognized as having the principal role in initiating and forming the relay succession plan. The overseer was consulted by each incumbent while the successor was usually not brought into the process until later.

When asked, “How was the successor developed to fill the role of the incumbent pastor?” the general consensus of the informants was that the successor

needed to be mentored by the incumbent pastor. According to the interviews, this would often entail regular meetings by the incumbent and successor, the incumbent helping the successor develop relationships with key church leaders, and the successor shadowing the incumbent throughout his daily responsibilities. The role of the state overseer during the time of successor development was very minimal. At most, the overseers would call to offer help or assistance if needed.

### ***Findings Related to Research Question 2***

*What is involved in the selection process of a new pastor in the context of a relay succession plan?* The selection process of a new pastor was tied to the category of successor origin. As noted in Table 8 below, this category explored two main themes: the process of determining a successor and the informants' roles in that process. The data analysis for "Process" occurred by coding the interviews accordingly each time a step in the course of determining a successor was mentioned. Likewise, the data analysis for "Role" occurred by coding the interviews each time an informant mentioned their role in determining the successor. The code "Role" was further analyzed by correlating each informant's position (incumbent, successor, or overseer) to his coded responses.

#### **Successor Origin**

The second premise identified from the literature review was successor origin. This section seeks to understand how the successor was identified within the church to assume the leadership role of the retiring incumbent.



Table 8. Successor origin: Relationship of protocol questions to excerpt codes

Category	Protocol Questions	Codes
Successor Origin	1. What process determined a successor at your church?	Process
	2. Describe your role in the process of determining a successor.	Role

### *Process of Determining a Successor*

The process for determining a successor in each of the cases began with the incumbent pastor. In each case, the impending retirement of the incumbent was the catalyst that started the search for a successor. One successor stated, “I believe that [Incumbent-C] always had in his mind what would happen [upon his retirement]” (Interview 8). In each church, the successor was readily identified by their position on the church’s staff or prior leadership role in the church. Incumbent-A stated, “He [Successor-A] was on staff with me for 9 years before we commenced the training program” (Interview 1).

Church-A had several candidates that would have been potential successors, but, before the time of Incumbent-A's retirement, the possible candidates left the church to pursue other opportunities. “I had several good men on staff, but the Lord worked it out that two of my leading men took other directions and that left [Successor-A] with me as one of my full-time men” (Interview 1). It seemed that Incumbent-A would have been open to considering other qualified staff members to succeed him, yet he felt their

departure from the church for other ministry opportunities was a divine means of directing him to Successor-A.

Likewise, the successor at Church-C was chosen because of his time of service on the church staff and his service as pastor of a sponsored church plant. Incumbent-C stated, "I had [Successor-C] on staff for 8 years and then he went out to start a church. So, they were the only likely choices. That's the decision we made" (Interview 7).

Once the incumbent pastors decided on a candidate to be their successor, they met with their state overseers to discuss the individual and the process for succession. Incumbent-B indicated that once he had decided Successor-B was his choice, he met with the state overseer. He stated,

I had a long talk with [Overseer-B], who is a very good friend. I began to share with him my need to make a personal change. He told me he would be willing to work with me. It makes things a lot easier to have a [state overseer] who is willing to work with you. I personally feel that was one of the key points in the process. [Overseer-B] knew I had a passion for the people. He asked, "How do you want to work it?" and I told him that I had [Successor-B] in mind to succeed me, and he agreed. (Interview 4)

Each of the overseers felt that the long tenure and commitment to the local church afforded each incumbent the opportunity to name their replacement and organize a relay succession. Overseer-A stated, "As the one who planted the church and started it and has built it this far, surely you [Incumbent-A] would have some feeling as to who might be good to follow you. I certainly would be open to your recommendations" (Interview 3).

Each of the incumbents, except Incumbent-C, met with the overseer prior to asking their successor to join them in the relay succession process. Overseer-B stated, "He [Incumbent-B] had been there for over 30 years and we had discussed at various

times who he perceived would be the best candidate to succeed him. In the year prior to his retirement and pastor emeritus status, we discussed who that person might be” (Interview 6). In Church-C, the incumbent did discuss with Successor-C his desire to choose him as the next pastor prior to meeting with the overseer. This could possibly be due to the fact that this particular relay succession was a transition from father-in-law to son-in-law.

Once the incumbents met with their overseers to discuss their thoughts on the potential successors—at least in churches A, B, and D—the incumbents then met with the potential successors to invite them into the process. Successor-B shared a comment that was typical of the responses regarding this point in the transition. He stated, “He [Incumbent-B] was the originator of the process; he charted the course for it and invited me [to join]” (Interview 5).

### ***Roles in Determining a Successor***

Within the context of successor origin, the case study protocol sought to collect information that would further understand the role of the informants in determining a successor. In each case, each informant had a different and unique responsibility in the determination of a successor.

**Incumbent.** In the initial stages of forming a plan, the incumbent was the main force behind choosing a successor. The incumbents indicated that they spent time in prayer trying to determine their own future and also who would lead their church into its future. Incumbent-B recalled, “I thought about it, I prayed about it, and I tried my best to work through the process [of determining a successor] (Interview 4). Incumbent-A

was more blunt in his assessment: “I was ready to get out, [Successor-A] was ready to get in, but we had to get the church ready” (Interview 1).

**Successor.** The successor’s role prior to the determination that they would be the next pastor was simply a role of listening and prayer. Some even indicated they played no role at all. Successor-B stated candidly, “I was the hapless victim. I was plucked out of a crowd so to speak and I didn't have a role to play except to be a staff pastor and to be there and available” (Interview 5). Successor-C stated, “My role was really a humble role of just being a prayer partner.” He further recalled, “My role really was in a prayerful capacity. When it became apparent that succession would take place, then my role changed” (Interview 8).

**Overseer.** The overseers consistently saw their roles as prayerfully seeking God’s plan for the local church as well as praying for the incumbents and successors. Speaking of the succession at Church-C, Overseer-C stated, “I strongly believe in a consensus, a partnering in [prayer]. So, my role was more of just hearing and listening to what God was saying” (Interview 9). He further stated,

I strongly believe that God calls men to churches and so my role as overseer was to have an ear to hear what the Spirit was saying. When we do that it not only includes what you think God is saying to you but what he is saying to you through the church. Scripture says, let him that hath an ear hear what the Spirit is saying and my role was just simply that. (Interview 9)

Overseer-D saw his role as one in which he served the local church through participating in the pastoral placement process.

It is my opinion that the overseer serves for the benefit of the flock of God and serves the local church by taking a specific role. And one of those roles is in pastoral placement. The overseer does make the appointment of the pastor to the church, but it is after consulting the local church and receiving their response. (Interview 12)

## **Data Summary for Research Question 2**

In each case, the successor had a strong relationship to the local church prior to being chosen as the successor. Each of the successors had served in some capacity within the study churches and were all personally selected by the incumbents and affirmed by the state overseers. The incumbents and successors mentioned the importance of prayer at this point in the process as the greatest factor in a smooth relay succession. Likewise, the overseers tended to view their role as prayer partners to assist the incumbent in determining the future direction of the local church.

## ***Findings Related to Research Question 3***

*What is the process of implementing a relay succession plan?* Since there seems to be no one right way to frame a relay succession, but rather general themes that can be employed, the researcher initially identified four themes from the research that were helpful in further understanding the process of relay succession at the study churches: specific components, role post- succession, perceived strengths, and perceived weaknesses (see Table 9). As these themes were being studied, another theme emerged through the interviews that proved to be helpful in further understanding relay succession in the COG: succession challenges. These five themes together provide a framework to understand the relay successions at the four study churches from the time a successor was selected through the end of the transitional time period.

## **Succession Contingencies**

The literature review discovered the premise of succession contingencies as the area of succession planning that deals with the various ways a relay succession plan can

be structured.

Table 9. Succession contingencies: Relationship of protocol questions to excerpt codes

Category	Protocol Questions	Codes
Succession Contingencies	1. Discuss the specific components of the relay succession at your church.	Specific Components
	2. What was your role once the succession plan was executed?	Role Post-Succession
	3. What do you feel were the strengths of the relay succession at your church? Please explain.	Perceived Strengths
	4. What do you feel were the weaknesses of the relay succession at your church? Please explain.	Perceived Weaknesses
	5. Not Applicable	Succession Challenges

### ***Components of the Relay Succession***

The following section will detail and analyze the components of the relay successions at each case study site. The data from this section was gathered using the answers to the protocol question “Discuss the specific components of the relay succession at your church” (see appendix 3).

**Overseer affirmation.** The role of the overseer in each of the planned successions was primarily as a counselor and advisor. Each of the incumbents seemed to

have a good working relationship with the overseer and understood that while the overseer would not play a primary role in the formation and implementation of the succession plan, the overseer did need to affirm the successor. The first step each incumbent took in initiating the succession plan was to contact the state overseer. “I had a long talk with [Overseer-B], who is a very good friend. I began to share with him my need to make a personal change. He told me he would be willing to work with me. It makes things a lot easier to have an overseer who is willing to work with you” (Interview 4). In each case, the first choice for a successor by the incumbent was accepted by the overseer. Incumbent-C stated,

We called the state overseer. He knew me well, he knew [Successor-C] well, and each of our ministries well. He was very open to what we were doing. He told me that if [you want Successor-C to succeed you], then I'm totally in favor of it, and I give it my blessing. He was a very gracious man. He offered no resistance, gave it his blessing and sent us off [to begin the process of transition]. (Interview 6)

In speaking of meeting with the overseer, Incumbent-B recalled, “I personally feel that [meeting with Overseer-B] was one of the key points in the process. Overseer-B knew I had a passion for the people. He asked, ‘How do you want to work it?’ I told him I had in mind [Successor-B], and he agreed” (Interview 4).

The incumbent pastors recognized that had the overseer been disinclined to accept the recommendations of the incumbent, the succession would have been much more challenging. Speaking of the possibility of an appointment directly by the overseer, Incumbent-C indicated that the overseer could appoint “someone else but that would not be desirable. They could be a charlatan. I didn't want to risk my life's ministry being diminished because of someone who was not sincere, honest, or upright” (Interview 7).

The following excerpts provide examples of a similar sentiment from the other informants:

I emphasize again. The state overseer can make a big difference in these things. If he has somebody over here in the corner and you've got to fight him, it is tough. It happens in the COG. (Interview 1)

I knew I could call our denominational headquarters and they would probably send someone from a position of state overseer, but I didn't want a person coming out of that position who would possibly only spend two years [as a pastor at Church-B]. They could very easily return to a state overseer position. I didn't want somebody to be sent that was only going to spend a short period of time [at the church]. I wanted somebody who could love the people, take care of the people, and help them grow. [I wanted someone] who would take them higher than what I could. (Interview 4)

**Plan development and implementation.** The second step in the succession process was to develop and implement the relay succession plan. For each of the churches this was a process that took place through multiple conversations primarily between the incumbent and successor. The plan, however, periodically would include the state overseer. None of the churches indicated forming a written plan of succession; rather, the plan was formed through a series of conversations and agreements between the incumbent and successor. Church-B was the only church that indicated consulting other models of succession before forming their own model:

It was a very collaborative effort. We both [Incumbent-B and Successor-B] brought resources to the table of models of succession that we had in our minds. We shared them with each other and ultimately came up with, collaboratively, a timeline. The timeline was developed by [Incumbent-B] and the components of it were birthed out of conversations that we had with each other. We then simply put [the plan] into play. (Interview 5)

**Congregational approval.** Once a plan was developed, there was a formal announcement given to the congregation. For most of the churches, this was a Sunday morning announcement that included the presence of the state overseer and taking a



congregational preference vote. The comments of Overseer-D were characteristic of other responses shared in the interviews:

I went personally to the church and received a response from them that was favorable. I don't remember the percentage, but I remember it was very strong. The pastor was so appreciated and loved and respected by his congregation that they trusted his recommendation. Then, when I came along and supported it I think they were pleased about that and it just seemed good to us and to the Holy Ghost for that appointment to be made. (Interview 12)

**Pre-transition process.** After the announcement was made, the next step in the relay succession process was for the churches to begin the formal transition from incumbent to successor. This pre-transition process took as little as 6 months for Church-C to as long as 2 years for Church-A. For some churches, the incumbent used this time for other ministry opportunities while maintaining a lesser leadership role over the congregation as in the case of Church-A. “We set up a 2-year training program whereby [Successor-A] became the pastor in training while I resided in [another state] for one year” (Interview 1). In other churches, the incumbent used this time to systematically hand over leadership of various boards and committees within the church. Incumbent-B recalled, “Throughout the year, I released a little more authority. He [Successor-B] took over a little more [authority] and we worked together” (Interview 4).

**Installation of new pastor.** At the end of the pre-transition process, each of the churches had a formal installation ceremony of the new pastor. In Churches A, B, and D, the overseer returned and preached the Sunday morning service. In Church-C the ceremonial installation was handled by Incumbent-C. The overseers and Incumbent-C indicated that they took care to explain to the congregation the new roles of the incumbent and successor. The following informant excerpts were typical:

I went through an installation service for both ministers. Though [Incumbent-D] was going to be getting a stipend or some kind of an allotment, we appointed him to the position of pastor emeritus, and I went through the process of explaining to the church what that title entailed, giving them a complete understanding of his rights and privileges that he had earned as a result of his long tenure and the confidence that the people had in him. [I also explained to the congregation] that there would be no demands placed upon him by the church, but that he would be recognized and have the freedom to move among them as a minister,,but not as a senior pastor. He would be under the leadership of [Successor-D]. After having installed him as pastor emeritus followed by the laying on of hands and anointing him for that role, we then moved from that to the installation of the pastor, explaining again his duties and responsibilities. The leaders of the church were then called upon to lay hands upon [Successor-D and his wife] as the transfer of leadership was passed from one man to the other. (Interview 12)

We also wanted to portray strength in unity between the pastor, who was handing over succession, and the successor. We felt like that was very important. To illustrate [the handing of the baton], we used a torch. [Incumbent-C] stood and addressed the congregation. [After addressing the congregation,] he handed the torch to me [Successor-C]. I came and knelt with my wife and he laid his hands over us and prayed over us, handing us the torch. The people then stood, applauded, and then I addressed them. We wanted to handle [the transition] very carefully in the beginning. (Interview 8)

**Post-transition process.** The post-transition process was as little as a few months at Church-A and as long as 2 years at Church-B. The post-transition timeline seemed to be based upon the needs of the successor. Church-D cut short their post-transition timeline due to the extensive pastoral experience of Successor-D. The other churches seemed to follow the initial timeline that was developed prior to implementation.

### ***Post-Succession Role***

The following section will discuss the roles of the incumbent, successor, and overseer after the transition of leadership from the incumbent to the successor. The protocol questions specifically inquired about each informant's role by asking, "What was your role once the succession plan was executed?"

**Incumbent.** While each of the incumbents acquired the title of “pastor emeritus” after the succession event, some seemed to have challenges settling into their new role. Incumbent-A's response was typical: “For a while it wasn’t easy for me to turn [the church] loose” (Interview 1). Nonetheless, in each case, the pastor emeritus role was as a figurehead. Most often the incumbent assumed the role of advisor and counselor to the successor with no leadership authority over the church. Describing his role as pastor emeritus, Incumbent-B said, “I simply stepped aside as pastor and stepped alongside as his own personal advisor” (Interview 4). Likewise, Incumbent-C stated, “I’ve functioned [at Church-C] as a resource person and to give encouragement where needed” (Interview 7).

All of the incumbents maintain cordial relationships with the successors. Churches A, B, and C all continue to provide office space to the incumbent. Incumbent-B noted, however, that it was important for the congregation to understand that once he became pastor emeritus, he would not entertain any negative comments about the church or his successor:

I told the [Church-B] family that I was not planning on going anywhere, and I was planning on being there. I told them I could only remain if they would not come to [my wife or me] with negative [comments] about the pastor or his family. I told them I would not entertain any negative [comments]. I said, ‘If you have problems, you take them to [Successor-B]. I cannot stay here at this church if you bring your problems to me. When the transition finishes, he will be your pastor. I will not.’ It’s been great because [the church] has honored us and our request. We have been able to stay. (Interview 4)

**Successor.** The role of the successor after the transition in each case was simply to assume the role of the senior pastor. Successor-C summed it up adequately, “I assumed the full responsibility of the church: pastor duties, preaching duties, everything” (Interview 8). Similarly, Successor-B stated, “My role as the lead pastor was to assume

all of his [the incumbent's] responsibilities" (Interview 5). In addition, Successor-A recalled, "I became the senior pastor and everything that entails as far as pastoring and overseeing the staff" (Interview 2).

**Overseer.** The role of the overseer during the post-transition period continued to be one of advisor and counselor to the new senior pastor. Commenting on his role post-succession, Overseer-A stated, "It was one of me being available to them upon request. It was answering phone calls and checking in with them" (Interview 3).

Overseer-C saw his role as that of an encourager: "It was one of reassuring him [Successor-C] and helping to encourage him to believe that this [transition] was indeed a plan from God" (Interview 9). He further elaborated, stating that his role was "to encourage him [Successor-C] to always honor [Incumbent-C], build him up, and to get together to resolve any potential dangers that they could face" (Interview 9).

### ***Perceived Strengths***

Each of the informants was quick to share the strengths of their respective succession plans. It was a consistent finding that each of the participants believed in the value of a relay succession plan as a positive means of pastoral transition. Strengths of the relay succession plan included the notion that the church was not required to adjust to a new pastor with a new vision, but simply a new person articulating a continuation of the same vision. Additionally, the demeanor of the men involved in the transition was mentioned as a strength. Most of the informants believed that the parties involved were prayerfully seeking the best interest of the local church. The following are comments from various informants that typified the responses to the protocol question, "What do you feel were the strengths of the relay succession at your church? Please explain."

It did not put the church into a new adjustment situation. (Interview 1)

The church was not negatively impacted. (Interview 2)

[Successor B] knew the church, he knew its set-up, he knew its operation, and he had been trained under a very confident and effective pastor. (Interview 6)

There was an immediate sense of trust [between the congregation and Successor-B]. (Interview 5)

The greatest strength in the transition was [Incumbent-B's] purposefulness and humility in the whole process and dedication to make it work. [Incumbent-B] became the best cheerleader, confidant, counselor, and consultant and had no interest in trying to manipulate or lead [the church members]. (Interview 5)

Both [the incumbent and the successor] had a good doctrinal understanding. (Interview 9)

A good relationship existed because [Successor-D] grew up under my ministry. (Interview 10)

The pastor [Successor-D] bought into the former pastor's vision, fulfilled those commitments, and has continued to follow the leadership style of [Incumbent-D]. (Interview 12)

### ***Perceived Weaknesses***

The perceived weaknesses were expressed mainly by the successors. The incumbents were reluctant to speak of any weaknesses in the relay succession and the overseers were often not immediately involved in the situation enough to identify weaknesses. Of those mentioned, the timeline for the post-transition process was mentioned most often. Successors indicated that there was sometimes not clarity in the mind of the staff members as to who was actually in charge. They also mentioned that the incumbent being regularly seen in the church caused some leadership confusion in the minds of the congregation as well. Successor-D stated,

I think the weakness was that, after the transition took place, Incumbent-D stayed too long. He remained visible and involved with things [at the church]. We are very good friends, and I have the utmost respect for him, but I think [his staying too long] actually stifled some things that were progressing. (Interview 10)

Likewise, Successor-A recalled, “Maybe the two years was what it took [to complete the transition], but that is a long time. It is a long time. I know it was a long time for him [Incumbent-A]. There were days that he was ready for it to be over and then there were days that I'm sure he questioned, ‘Are we doing the right thing?’” (Interview 2).

This reaction, however, was not always the case. Successor-B indicated that Incumbent-B took special care to manage his role post-succession very carefully and that if there were any mistakes, they were because of Successor-B’s own perspective of transitioning to the role of senior pastor.

I thought that since I had been here for sixteen years and that I was a known voice and had a level of trust [with the congregation], I didn’t feel the need to build trust. I was so naive in my awareness of the need to build trust that it almost felt like I was building trust from scratch. I leveraged some changes up front, assuming that everyone would blame the transition, but I think those changes that I leveraged up front contributed in part to the attrition that we had in the transition. (Interview 5)

### ***Succession Challenges***

As the transcripts were being coded, a new theme emerged that was helpful in further understanding relay successions in the COG. Many of the informants shared cautions about the process of implementing a relay succession. Many of these challenges were not experienced by the churches, but were perceived by the informants to be possible dangers. For example, in Church-B, the incumbent knew there were a few families who loved him so much that they were unwilling to embrace the new leadership of Successor-B. Some of these families left the church at the time of transition, while others left and later returned. In addition, because of the usual appointment process in the COG, the overseers felt pressure to appoint other pastors within the region to the case study churches. Overseer-D shared,

In the church of God we have a presupposed way that things are supposed to be carried out, that is, promoting those pastors in ministry who have longevity, who have experience. The pressure that rests upon an overseer is the expectation by the ministers [that you will follow the traditional protocol]. When you don't follow that "protocol" that they have come to believe is so much required, you risk pleasing those that work with you. (Interview 12)

In addition, many informants indicated that the overseer could hinder implementing a relay succession in the COG. The following were typical responses:

I love the COG, but I don't appreciate all the operations of the COG. Therefore, I decided in my heart and mind that I was going to do something different. We have some cases where the father steps aside and the son takes over and that, seemingly, has worked. This, however, was probably one of the few times that it was not a father-son situation, and the Lord blessed us with a state overseer who saw the need and the situation and was willing and ready to work with the program. (Interview 1)

The state overseer can make a big difference in these things. If he has somebody over here in the corner and you've got to fight the state overseer, it is tough. And that happens in the COG. (Interview 1)

Often in the COG the overseer comes in and selects those [pastors] who have been pastoring long enough and are connected with whoever their current overseer is. Their names are chosen first, especially when it concerns a COG church of this size, the largest church in [name of state]. (Interview 2)

I believe that the most detrimental thing that can happen in [a transition] is that you bring someone on completely new, someone who an overseer steps in and just simply appoints, someone who has no insight into the church. When you have a healthy church that is an older church, that is a progressive church, that is a large congregation, I think that there should be some kind of succession in place. For some traditional overseers, their ego is too much to allow that to happen. My goal was to see the church progress and not to take a political stance for allowing a certain guy that I was friends with or knew get a big church. (Interview 6)

### **Data Summary for Research Question 3**

The research has shown that the senior pastor is the primary initiator and driver of a relay succession in the COG. Each of the incumbents sought counsel and advice from the state overseer, but ultimately decided who the successor would be and the process the church would follow to execute the transition. The state overseer primarily

served as an advisor when needed and assisted in giving affirmation to the succession process when presented to the congregation. The successor was seldom involved in the process early on. Once the successor was chosen, the incumbent and successor usually developed a mentoring relationship to assist the successor in learning the nuances of the senior pastorate at his particular location. At the point when church leadership duties were fully transitioned to the successor, the successor, in all cases, assumed the full role of pastoral leadership and the incumbent was honored with an emeritus status that included no leadership authority in the church.

#### ***Findings Related to Research Question 4***

*How is the average weekly attendance and average weekly financial giving of a congregation affected in the context of a relay succession plan?* The research indicated that the majority of the churches studied experienced growth in the two years following the relay succession. Whenever an informant made reference to attendance or finances, the statements were coded accordingly (see Table 10). For the purposes of this study, the two-year period began at the time the successor assumed the title of “Senior Pastor.” Sunday morning worship attendance was measured exclusively because this was the time when most people attended church. Gifts designated as tithe were measured exclusively because tithe income is the only financial record provided to the denominational offices in report form.

#### **Succession Consequences**

The final category discovered in the literature review was succession consequences. While there are many areas of the church that can be measured as an indicator of effectiveness, finances and attendance are the two most often used (Schnase



2007). It should be noted that these are imperfect tools to fully judge the effectiveness of a succession (Schnase 2007), but they are adequate to give a snapshot of how the congregation accepted the changes in the senior pastorate.

Table 10. Succession consequences: Relationship of protocol questions to excerpt codes

Category	Protocol Questions	Codes
Succession Consequences	1. What was the impact on worship attendance during the first two years after the execution of the relay succession plan?	Attendance
	2. What was the impact on financial giving during the first two years after the execution of the relay succession plan?	Finances

### ***Financial and Numerical Growth***

As Table 11 shows, Churches A, C, and D all experienced numerical and financial growth during the two years after the pastoral transition. Since the goal of this study was to descriptively understand relay succession in the pastorate, a causal link between the relay succession itself and increases or decreases in attendance was not within the scope of this research. Generally, the informants felt the progression of the church post-succession was positive. With respect to the study churches, the comments were all very similar:

The progress of the church has not ceased. It has not been arrested in any way.  
(Interview 1)

Of all the things you can testify about, you know the church grew. (Interview 2)

It was very positive. There were increases that occurred both financially and numerically. (Interview 10)

Table 11. Average attendance and tithe for case study churches

Church-A		
Year	Average weekly Attendance	Average Monthly Tithes
2001	1047	\$126,865
2002	1134	\$143,206
2003	1208	\$155,934
Church-B		
Year	Average weekly Attendance	Average Monthly Tithes
2007	1141	\$88,604
2008	1008	\$83,838
2009	1000	\$80,310
Church-C		
Year	Average weekly Attendance	Average Monthly Tithes
1997	176	\$11,727
1998	435	\$23,485
1999	473	\$30,985
Church-D		
Year	Average weekly Attendance	Average Monthly Tithes
1999	215	\$11,604
2000	229	\$16,197
2001	259	\$17,026

#### Data Summary for Research Question 4

According to the informants, all of the churches studied were in a growth mode prior to the relay succession. All of the churches except for Church-B continued that pattern after succession. Church-B experienced a slight decline in the ensuing two years after the succession. Incumbent-B and Successor-B both indicated that the decline in attendance was partially due to a transition in music pastors shortly before the transition in the senior pastorate. Successor-B also indicated that he may have made some initial

changes too quickly: “I leveraged some changes up front assuming that everyone would just blame it on the transition, but I think those changes that I leveraged up front contributed in part to the attrition that we had in transition” (Interview 5). Incumbent-B stated, however, that in the period between the time of succession and the time of the interview that “there has been great growth” (Interview 4).

Each of the informants felt that the aforementioned strengths of the transitions were contributing factors to the overall growth of the church. Successor-A summed it up best: “Of all the things you can testify about, you know the church grew” (Interview 2).

### **Evaluation of the Research Design**

A significant strength of this research design was the multiple case study method. “The evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as being more robust” (Yin 2009, 53). The data triangulation that occurred from the results of the four case studies produced confidence in the research findings and analysis. Each case study had three informants with differing roles and unique perspectives on the relay succession. The interviews provided information that translated into a “rich, thick description” of the study in the analysis and findings section (Merriam 2009, 29).

A second strength of this study was the interview process itself. The researcher followed the suggestions of Billiet and Loosveldt and read the questions from the case study protocol exactly as worded so as to allow comparison from one case study to the next (Billiet and Loosveldt 1988, 205-06). Most of the informants were more than willing to share their experiences in the relay succession and seemed eager to for these experiences to be used for the benefit of other churches.

While this study had many strengths, there are challenges to any case study methodology. Using it for “research purposes remains one of the most challenging of all social science endeavors” (Yin 2009, 3). The researcher found that clearly understanding the process for completing and evaluating a case study was initially elusive. Extensive research into design methodology assisted to overcome this challenge. A second and related challenge is that there were only a few methodological texts to assist the researcher in developing an effective case study (Yin 2009, 14). There seemed to be an assumed understanding of case study methodology among researchers and writers in the social sciences (Hancock and Algozzine 2006, ix). The texts that were written specifically on case study research were helpful, however, in designing the research methodology.

## CHAPTER 5

### CONCLUSIONS

This study was designed to understand and evaluate the best-case examples of relay successions among pastors in the COG. The following chapter presents the researcher's conclusions based on data analysis and evaluation.

#### **Research Purpose**

The purpose of this study was to discover and articulate the process and principles of relay succession in the senior pastorate within the Church of God (COG) denomination, which is headquartered in Cleveland, Tennessee. In order to build a foundation for future research, a qualitative, descriptive, multiple case study method was used. Through the examination of several best-case examples of relay succession, principles emerged that can assist local churches and pastors in directing a positive relay type succession event.

#### **Research Questions**

1. What are the antecedents of a relay succession plan?
2. What is involved in the selection process of a new pastor in the context of a relay succession plan?
3. What is the process of implementing a relay succession plan?
4. How is the average weekly attendance and average weekly financial giving of a congregation affected in the context of a relay succession plan?

## **Research Implications**

The following is a summary of the implications derived from careful evaluation of the analyzed results along with insights from the precedent literature:

1. Best-case examples of relay successions follow a distinct pattern.
2. In best-case examples of relay successions, the incumbent pastor selects the successor.
3. In best-case examples of relay successions, the incumbent pastor leads the succession.
4. In best-case examples of relay successions, the succession is used to prepare the successor for the pastorate.
5. Best-case examples of relay successions minimize loss during a transition.
6. Best-case examples of relay successions honor the incumbent leader.
7. In best-case examples of relay successions, the successor assumes full pastoral duties once the relay succession is complete.

### ***Implication 1***

Implication 1 is that best-case examples of relay successions follow a distinct pattern. It integrates findings from the first three research questions, which found that the study churches followed the same broad pattern when initiating, implementing, and concluding a relay succession. There were four distinct stages of the succession process: initial planning, pre-transition preparation, ceremonial transition, and post-transition normalcy. These four stages loosely correspond to the research categories identified in the literature review (succession antecedents, successor origin, succession contingencies, and succession consequences).

## **Initial Planning**

Research question 1 sought to understand the antecedents of relay succession. In the initial planning stages, retirement of the incumbent was the catalyst for each of the study churches. The pastors had a sense of their own mortality as well as a sense of the need to effectively pass along church leadership to a capable next generation leader. Retirement had the highest level of sub-coding under the node for succession catalyst occurring 79% of the time within this heading. While the incumbent pastors of this study did not see age as a limiting factor in ministry—all of them continued in non-pastoral ministry roles—like many CEOs, they did consider age to be a potential hindrance in continuing to grow a healthy organization because of the demanding physical rigors of leadership (Gentry, Hurst, and Shen 2006, 113).

It was during this phase that the incumbent selected a potential successor. While each of the incumbents consulted with the state overseer regarding his choice, the decision to determine the successor of each study church rested with the incumbent. Like the elders at Fairhaven Church who presided over the transition from Peter Schwalm to David Smith, several of the state overseers suggested that the tenure of the incumbent afforded them the opportunity to make the choice of the next pastor (Jethani 2005, 52). This implication is notable since the COG usually follows a pattern of direct appointment with congregational affirmation in a pastoral succession event. The average tenure of the incumbents in this study was slightly more than 27 years.

## **Pre-Transition Preparation**

During the pre-transition preparation phase of the succession plan, a date for transition was selected and the successor and incumbent met regularly to discuss the

transition. This phase involved the mentoring of the successor by the incumbent. Weese and Crabtree suggest that “effective leadership relies on a body of knowledge that can be transferred from one leader to another” (Weese and Crabtree 2004, 115). Other researchers affirm this concept as well (Charan 2008, 35-40; Goldsmith 2009; Sobol, Harkins and Conley 2007; Charan, Drotter, and Noel 2001; Bridges 2003, 39-56). Like many corporate CEOs, the incumbents in this study concluded that a relay succession was best for their church because it gave them the opportunity to transfer organization-specific information and skills to the successor—information and skills that would have been lost if a traditional COG type succession were executed (Santora 2004, 159; Lee, Lim and Lim 2003, 657). For example, Incumbent-B stated,

Even though we had a large staff, I never shared with the staff pastors the inner workings of the church. They had their jobs, their responsibilities, including [Successor-B]. [Successor-B] had already been in a position leading the other pastors. That was part of his job description. However, he needed to know the inside track. It was important that I share with him the inside workings of the church. That was when he began to mirror me. He began to walk and shadow me as we went through meetings and other things. I gradually let him handle the meetings. Even when it came to finally turning over the gavel in our council, I took his seat and he took mine. He took the gavel and handled the meeting from that point. The staff never played any part in my council meetings. Therefore, it was a process of him [Successor-B] learning the procedure—what to do and how to do it.

### **Ceremonial Transition**

The third phase of the succession, ceremonial transition, was the event where the transfer of leadership from the incumbent to the successor took place. In each of the study churches, the incumbent was installed as pastor emeritus and the successor as the senior pastor in a symbolic ceremony. The study churches wanted to convey to their congregations the new roles of the incumbent and successor through this event.



In order to accomplish that goal, they used symbols to help convey the message. Russell and Bucher suggest that this use of symbols is an important aspect of transition plans in the local church (Russell and Bucher 2010, 78-79). Russell, in his own transition at Southeast Christian Church, decided to use a baton, “publicly hand[ing] it to [his] successor and encourage[ing] him to run the next leg of the race with diligence and faithfulness to God’s Word” (Russell and Bucher 2010, 79). Other symbols used in pastoral transitions have ranged from passing a torch, to giving a Bible, to washing the feet of one’s successor (Warner 2005). Leaders of pastoral successions believe that symbolic transfers of leadership are an important aspect of the relay succession process because it provides a visual illustration of the transition.

### **Post-Succession Normalcy**

The final phase of pastoral succession discovered in the research was post-succession normalcy. After the transition had taken place, each of the incumbents relinquished all pastoral authority over the church to the successor. It was at this time that the successor stepped fully into the role of senior pastor with its accompanying authority and responsibility. Three out of the 4 incumbents left the church for a season to give the successor time to establish his leadership. Incumbent-B stayed and became a personal mentor to the new pastor. In all of the study churches the relationship between the successor and incumbent remained strong and intact. The precedent literature supports this notion that it’s best for the incumbent to remove himself completely from the church to prevent any unintended consequences such as congregational squabbling or successor-incumbent competition (Warner 2005; Gregory 1994, 319-24).

### ***Implication 2***

Implication 2 is that, in best-case examples of relay successions, the incumbent pastor selects the successor. In each of the study churches, the incumbent pastor spent from a few months—in the case of Incumbent-A—to a few years—approximately 6 years for Incumbent-D—praying and thinking about his impending retirement. During this time, he selected a successor from within the church to become the new pastor. Although the incumbent did seek the counsel of the state overseer, in each church the final decision was the incumbent's. As previously mentioned, this implication is notable since the COG usually follows a pattern of direct appointment of a successor with congregational affirmation. Surprisingly, the overseers were not overtly involved in the succession process in the study churches; rather, they served as counselors for the incumbents and successors. Jethani, Russell, and Bucher each indicate that successor selection is best left to the departing pastor if possible (Jethani 2005, 52; Russell and Bucher 2010, 62-63). Within the study churches, the congregations did affirm the selection of the successor by the incumbent through a preference vote.

### ***Implication 3***

Implication 3 is that, in best-case examples of relay successions, the incumbent pastor leads the succession. As articulated in the church narratives, each incumbent pastor initiated, as well as implemented, the relay succession plan. As opposed to most corporate transitions where the board of directors leads succession planning (Zhang and Rajagopalan 2006, 96), in the COG churches studied, the incumbent pastor was the initiator of the succession planning process. Russell and Bucher state,

It's wise for the preacher to suggest the successor, the strategy, the departure date, and his intention afterward. The Elders may want to introduce possible

improvements, but the preacher needs to initiate the discussion and the Church Board needs to respect his wishes. If they can't do that, then they shouldn't pretend it's a transition when it's really a termination. (Russell and Bucher 2010, 63)

#### ***Implication 4***

Implication 4 is that, in best-case examples of relay successions, the succession is used to prepare the successor for the pastorate. In the study churches, two of the successors did not have prior experience as a senior pastor while the other two had served moderate length tenures as senior pastors—Successor-C served 8 years as a senior pastor and Successor-D 11 years as a senior pastor. In each church, however, the incumbent felt there was organization-specific information beyond pastoral experience that needed to be gained. Zhang and Rajagopalan's research suggests

that the grooming period in a relay succession may offer an opportunity for both the firm and the heir to learn about each other and about key internal and external contingencies. . . . Thus, the grooming period may be akin to the "school" within which the new CEO's education takes place. In contrast, without the grooming period, the education is likely to take place after succession and impose higher cost to the firm. (Zhang and Rajagopalan 2005, 101)

The pre-transition time period was spent developing the successor by introducing him to the people and acquainting him with the resources necessary to successfully lead the church. There were also transitions in the preaching schedule so that weekly preaching duties gradually shifted from the incumbent to the successor in order to develop the successor's preaching ability as well as his rapport with the congregation.

The notion that organization-specific knowledge is critical to effective succession planning has its genesis in the work of Pfeffer and Salancik. They studied successions in the chief administrative positions of large hospitals. In one of the only studies of its kind, they found hospitals performed better when a successor was developed

with an understanding of the unique contingencies related to their particular organizational context (Pfeffer and Salancik 1977, 75). The incumbents in the study churches likewise felt that the long-term health of the church rested with them adequately preparing their successor with the unique information and relationships they had gained over the course of their tenure.

### ***Implication 5***

Implication 5 is that best-case examples of relay successions minimize loss during a transition. The analysis of the post-succession performance of the study churches found that most increased in weekly attendance and giving during the two-years after the transition took place. As noted in table 3, Church-B was the only church that experienced a slight decline in attendance and giving, which could possibly have been due to factors outside of the succession itself. Each of the incumbents felt that the relay succession helped minimize the losses after the succession. In addition, they also felt that hiring an external successor would increase the chances for attendance decline and financial loss. May suggests that relay succession may help improve post-succession performance in churches (May 2010, 120). Likewise, Weese and Crabtree indicate that a planned succession can help avoid a substantial decline in a church's attendance and finances. They estimate that churches that have not engaged in a planned pastoral succession can expect at least a 15% decline in both areas (Weese and Crabtree 2004, 30-31).

### ***Implication 6***

Implication 6 is that best-case examples of relay successions honor the incumbent leader. In typical COG successions, the incumbent pastor resigns and is

replaced by an external successor. The external successor usually has no connection to the past history of the church or the incumbent and is primarily concerned with the church's future. In the study churches, however, the successors tended to have great respect and admiration for the pastors that preceded them. The incumbents were honored with the title of "Pastor Emeritus" and were given continued financial compensation for a period of time. Three out of the 4 incumbents continued to maintain office space at the church at the request of the successor. In each case, the successors welcomed the incumbent pastors back to the church periodically and provided them the opportunity to share God's Word and minister to the people. Successor-D's response was typical:

[Incumbent-D] was the pastor as long as he was the pastor, and I would submit to what he wanted. Then, in turn, when I became the pastor, he became the pastor emeritus, and he would submit to me as the pastor. The [defining] moment for the church was when they saw the mutual respect [we had for one another]. To this day, if [Incumbent-D] comes to our church, we honor him very highly. And that will continue as long as I am the pastor. (Interview 10)

Although references to the incumbent after a succession were scant in the business literature reviewed, references to honoring the incumbent in church resources abound. Anthony and Boersma suggest that entertaining criticisms of the former pastor could be a significant and costly mistake for successors (Anthony and Boersma 2007, 276). Weese and Crabtree suggest that honoring one's predecessor is one of the first scriptural precepts about transitions gleaned from the life of Jesus. They hold that Jesus' public affirmation of John the Baptist's ministry confirmed the importance of John's work (Weese and Crabtree 2004, 17-18). Likewise, Russell and Bucher indicate that "only when the itch to pay respect and say goodbye [to the incumbent] is scratched will the congregation be ready to move on" (Russell and Bucher 2010, 76).

### ***Implication 7***

Implication 7 is that, in best-case examples of relay successions, the successor assumes full pastoral duties once the relay succession is complete. During the pre-succession period, each incumbent in the study churches mentored and shared organization-specific information with the successor. During this time, the incumbent carried the full authority of the pastorate even though the responsibilities were progressively being delegated to the successors. Once the transition was completed, however, the successor was fully responsible for all of the incumbent's duties prior to the succession. None of the incumbents retained any formal power after the transition occurred. The pastor emeritus title given to each incumbent was only an honorary title. For example, Incumbent-B recalled, "I've told [Successor-B] from time to time that I'm proud of him. I'm proud of the work that he has done and changes he has made. I haven't always agreed with all of the changes, but it's not my place to agree because my job was completed when I handed it over" (Interview 4). Gentry, Hurst, and Shen indicate that if the incumbent remains in a role with authority for too long once a successor has been identified, it can actually prevent the succession from taking place. Incumbents that hold onto power may continue to influence decisions within the organization, preventing the successor from fully taking charge (Gentry, Hurst, and Shen 2006, 113).

### **Research Applications**

Incumbents, successors, and state overseers should be able to make application from this research. The literature review established the need to understand relay succession better. Gimabatista, Rowe, and Riaz indicated in their assessment of succession literature that substantive research in the area of relay succession was lacking

and that a case study approach would be helpful to understand this phenomenon better (Giambatista, Rowe, and Riaz 2006, 982-83). Further, in his research of succession types in Southern Baptist churches, May indicates that more insight into relay succession would be helpful (May 2010, 125). A review and application of the research findings should prove helpful to those in church leadership who participate in initiating, managing, and executing pastoral successions.

### *Incumbents*

As previously mentioned, within the COG the majority of incumbent pastors are nearing retirement age (Church of God 2010, 9). This statistic is true of other denominations as well (Kelly 2007). As pastors think about retirement, the research findings could prove helpful as they seek to transition out of pastoral ministry. Since, as Jethani notes, the departing leader should be the initiator of the succession plan (Jethani 2005, 52), this research can provide an impetus for pastors looking to undergo future succession plans.

First, a plan to assist COG incumbents to begin thinking about succession would be helpful. Instead of leaving the transition entirely in the hands of the denominational government, the COG could recognize the valuable role long-term pastors can play in their church's future. Identifying long-term pastors and educating them about the value of relay succession would be beneficial. While every situation is not suitable for a relay succession, many are.

Second, development of resources that make incumbents aware of their limitations as they near retirement would be helpful. Many of the incumbents in this study suggested that while they desired to continue in ministry, the physical demands of

pastoring were becoming a challenge. Pastors that have enjoyed a long tenure at a specific church should begin thinking about their congregation's needs after they are gone. These pastors have undoubtedly influenced their congregants through their preaching, teaching, and vision-casting and should seek to help them launch their next phase of ministry under a new leader.

Third, incumbents can apply the pattern of relay succession identified in this research to their own situation. The value of case study research is that it allows the reader to make application to his own context even though the situations may be different (Merriam 2009, 29). While each of the study churches handled the details differently, the broad themes that emerged could prove helpful in constructing a successful transition plan in most any church.

Finally, this research provides a means for incumbents to know what to do after the transition is complete. The research could be incorporated into the aforementioned denominational resources. All of the incumbents in the study churches continued in another phase of active ministry. None of them saw retirement from pastoring as limiting their ability to preach, teach, or share the gospel. In fact, many of the incumbents relayed stories of unique opportunities to minister in circumstances that otherwise would not have been made available if they were still pastoring.

### *Successors*

The research findings could also prove helpful to those succeeding an incumbent pastor through a relay succession. Successors have the unique role in the pre-transition phase of gaining more pastoral responsibility without the responsibilities that come with being the senior pastor. Seminaries may also find this information useful



because, according to the demographic statistics articulated in chapter 1, the pastorate is ageing and more seminary graduates may be filling the role of retiring incumbents.

In the beginning of the successions at the study churches, most of the successors indicated that their role was to continue performing their assigned responsibilities and to pray about their future role in the church. As the transition progressed, they became more involved in developing the nuances of the succession plan. Seminaries could articulate the broad themes that emerged in this research, instructing students who may find themselves in a relay succession to remain humble throughout the process and assume leadership at the right time rather than trying to rush the transition along. While some of the successors indicated that the transitional period at their particular churches may have lasted a little longer than necessary, each of them respectfully and humbly waited for the incumbent to direct the transition according to his timeframe.

A second application for successors is to spend the necessary time honoring their predecessor for their ministerial labor. The research shows how the study churches continued to provide modest benefits to the incumbents after the succession was complete. For most of the churches, these benefits were given for a prearranged timeframe; nonetheless, it was an important part of the transition, one that each successor made sure was carried out.

### *State Overseers*

Within the COG, this research could assist the state overseer by helping them to see the benefits of relay succession. Many state overseers may only be familiar with the traditional means of pastoral transitions in the COG. Denominational leaders could

find this research helpful in training state overseers to encourage long-term pastors who may be approaching retirement in their respective regions to begin thinking about relay succession. Larger churches may fare better in a relay succession than they would through an appointment process.

In addition, state overseers could utilize the research findings to inform their role as relay successions are implemented within their states. Each of the incumbents indicated that their positive working relationships with their state overseers allowed them the liberty to direct the relay succession from the local church.

### **Research Limitations**

It was noted in chapter 1 that this study examined only those churches that have experienced a relay type succession within the study period of 1994-2009 and had an average weekly attendance greater than 150 at the time of the succession event. This researcher has not observed a relay succession in a church with attendance lower than the weekly attendance threshold. In most cases, churches must have an adequate weekly attendance to financially support the additional staff member it takes to implement a relay succession. This is not to say that a relay succession could not take place in a smaller church, but it may be more difficult because the pool from which to identify an heir apparent is significantly smaller.

This research is limited in providing insight for other churches that are part of denominational systems that govern differently than the COG. While some of the broad themes will be helpful for pastors and churches across the denominational spectrum, certain areas such as the discussion of the role of the state overseer will not be applicable.

Finally, this research should not be interpreted to prefer relay succession over other types of pastoral succession. Relay succession has been found to be useful in the contexts of the study churches, which were best case examples, but will most likely not be useful in all church contexts. Each type of succession will have strengths and weaknesses which is why the case study protocol probed informants perceptions with regards to weaknesses inherent in the relay process.

### **Further Research**

A number of studies could be suggested for future research. First, the current study could be expanded to include other denominations where churches have performed relay successions. This expansion would help improve the research findings and provide better application to contexts outside the COG. In addition, expanding the current study would also provide the opportunity to research churches with a variety of different historical contexts. For instance, all of the study churches grew from relatively small congregations to relatively large congregations under the tenure of the incumbent pastor. Future research may improve the findings by examining churches that were already of significant size when the incumbent took office.

A second suggestion for future research would be to examine how incumbents select successors. While this study sought to understand and articulate the process and principles of relay succession in the COG, future research may focus specifically on how and why incumbents select certain successors over other available successors in the same organization.

A third area of research that could be helpful to further understand relay succession would be to examine relay successions in local churches that were deemed

unsuccessful. Identifying potential problem areas within the relay process would help churches and denominational leaders better prepare incumbents, successors, and churches for the challenges of pastoral transition.

The precedent literature indicated that it was not in the best interest of the organization for the incumbent to stay after the succession took place. Since 3 out of the 4 incumbents stayed at their respective churches after the succession event with seemingly good results, a final area of research could explore the competencies of the incumbent, successor, and congregation that allowed that successful transition to take place.

### **Conclusion**

One of the defining moments of King David's life came in his latter years when he paved the way for his son Solomon to reign in his stead. King David would be labeled a great success by any definition. But David created a legacy by putting the nation into a position of continuing greatness without him. Parents who pass the baton of faith onto their children, business owners who plan to retire, and especially church leaders and preachers who want the church to continue to minister effectively are wise to develop a practical transition plan. (Russell and Bucher 2010, 112)

Relay successions are found in the Scriptures, in business, and in the church. While not all churches can or should utilize a relay succession, for those scenarios where one is warranted, it can provide a positive experience for the incumbent, successor, and congregation. Planning for succession creates a willingness in the hearts of believers to seek God for future ministry success even beyond their own tenure.

## APPENDIX 1

### EXPERT PANEL

The following individuals were asked to participate in the expert panel for this study. They are recognized as expert scholars and/or practitioners in the fields of church ministry, leadership and Christian education. They reviewed the survey instrument and provided feedback and suggestions that were integrated into the final instrument used by the researcher.

## Expert Panel

<i>Name</i>	<i>Title/Qualifications</i>
Shane Arnold, Ph.D.	Double Springs Baptist Church, Athens, TN Pastor Over 10 years pastoral experience
Jason Clark, D.Min.	First Baptist Church, Athens, TN Pastor Over 15 years pastoral experience
Michael Baker, Ph.D.	Church of God in Georgia Regional Overseer Over 20 years of administrative experience
Bob Bayles, Ph.D.	Lee University, Cleveland, TN, Director, Graduate Studies in Christian Ministries Professor of Discipleship and Formation Over 20 years of church ministry experience
Jerald Daffe, D. Min	Lee University, Cleveland, TN, Professor of Pastoral Ministries Over 15 years of church ministry experience
Louis Morgan, Ph.D.	Lee University, Cleveland, TN, Librarian for Public Service and Learning
Wayne Roberts	State Farm Insurance, Charlottesville, VA Claims Division Manager Covenant Church of God, Charlottesville, VA Church Board Chairman (25+ years)
Tom Rosson, Ph.D.	Church of God in Central and Eastern Europe Education Director Eurasian Theological Seminary, Moscow, Russia, President Over 20 years pastoral and educational experience
John Kie Vining, D.Min.	Church of God Family Ministries, Cleveland, TN, Director Over 20 years pastoral experience

## APPENDIX 2

### INTERVIEW QUESTIONS

The following questions were designed to interview the incumbent pastor, the successor pastor, and the state overseer. Each question was asked at every interview and the researcher explored issues of importance as they were addressed in the interview process.

## **Embedded Interview**

### ***Section 1: Personal Background***

1. Briefly describe your call to ministry and the major events that led to your decision to serve the local church.
2. Describe your theological training.
3. Describe your ministry experience.

### ***Section 2: Succession Antecedents***

1. What was the catalyst that initiated the succession planning process?
2. Discuss your role in the formation of the relay succession plan at \_\_\_\_\_ church.
3. How was the successor developed to fill the role of the incumbent pastor?

### ***Section 3: Successor Origin***

1. How was a successor determined at \_\_\_\_\_ church?
2. Describe your role during the process of determining a successor.

### ***Section 4: Succession Contingencies***

1. What was your role once the succession plan was executed?
2. Discuss the components of the relay succession at \_\_\_\_\_ church.
3. What do you feel were the strengths of the relay succession at \_\_\_\_\_ church?
4. What do you feel were the weaknesses of the relay succession at \_\_\_\_\_ church?



### ***Section 5: Succession Consequences***

1. What was the impact on attendance during the first two years after the execution of the relay succession plan?
2. What was the impact on financial giving during the first two years after the execution of the relay succession plan?

## APPENDIX 3

### CASE STUDY PROTOCOL

The following protocol was used to conduct the site visits at each church. It served as a guide to remind the researcher of the events that needed to take place during each interview. This process provided the needed consistency in the data-gathering phase to appropriately triangulate the data during the final phase of the research.

## **Interview Protocol**

### ***Agreement to Participate and Consent to Audio-recording***

In order to assist in the note-taking process, the researcher would like to audiotape the interview session. If you agree to allow this, please give your verbal consent at the beginning of the session. The researcher, alone, will have access to these recordings, which will be destroyed after they are transcribed. Also, please understand that your participation in this research effort is voluntary, and you may stop the interview at any time.

### ***Introduction***

This interview is planned to last no longer than one hour. Both your experience in and contribution to a succession plan were factors in your selection for this study. The research effort is particularly focused on understanding the process of succession in the local church. It is not the intention of the researcher to evaluate the process and execution of the succession plan. Instead, the study is an attempt to understand the current approaches of a sampling of those who have participated in a succession plan in the local church.

### ***Section 1: Purpose***

The purpose of this study is to discover and articulate the process and principles of relay succession in the senior pastorate within the Church of God (COG) denomination headquartered in Cleveland, Tennessee. In order to build a foundation for future research, a qualitative, descriptive, multiple case study method will be used. Through the examination of several best-case examples of relay succession, principles

will emerge that can assist the local church and pastor in directing a positive relay type succession event.

### **Research Questions**

1. What are the antecedents of a relay succession plan?
2. What is involved in the selection process of a new pastor in the context of a relay succession plan?
3. What is the training process of a new pastor in the context of a relay succession plan?
4. How is the average weekly attendance and average weekly financial giving of a congregation affected in the context of a relay succession plan?

### ***Section 2: Field Procedures***

Access to the case study sites has been granted through a telephone conversation with the informants for the study. A follow-up letter has been mailed detailing the purpose of the research and the process that will be followed for the in-person interviews. The following methods of data collection were utilized:

1. Recorded interviews
2. Acquisition of pertinent documents

### **Procedural Reminders**

1. Send interview questions by electronic mail to interviewees
2. Day of visit:
  - a. Request private room for interview
  - b. Request permission to record interviews
  - c. Have digital recorder at approximate equidistance between interviewer and informant

- d. Ask questions as written on survey instrument (Appendix 2), probe incomplete answers
- e. Thank informant for time

### 3. Post-Interview Follow-up

- a. Transcribe interviews for informant to review and make changes as necessary
- b. Send thank you note and small token of appreciation

### *Section 3: Interview Questions*

The following interview questions will help gather your insights into the relay succession at \_\_\_\_\_ church.

#### **Personal Background**

1. Briefly describe your call to ministry and the major events that led to your decision to serve the local church.
2. Describe your theological training.
3. Describe your ministry experience.

#### **Succession Antecedents**

1. What was the catalyst that initiated the succession planning process?
2. Discuss your role in the formation of the relay succession plan at \_\_\_\_\_ church.
3. How was the successor developed to fill the role of the incumbent pastor?

#### **Successor Origin**

1. How was a successor determined at \_\_\_\_\_ church?
2. Describe your role during the process of determining a successor.

### **Succession Contingencies**

1. What was your role once the succession plan was executed?
2. Discuss the components of the relay succession at \_\_\_\_\_ church.
3. What do you feel were the strengths of the relay succession at \_\_\_\_\_ church?
4. What do you feel were the weaknesses of the relay succession at \_\_\_\_\_ church?

### **Succession Consequences**

1. What was the impact on attendance during the first two years after the execution of the relay succession plan?
2. What was the impact on financial giving during the first two years after the execution of the relay succession plan?

### **Case Study Report**

The case study report will compile the data into the following categories: background information, succession antecedents, successor origin, succession contingencies, and succession consequences.

## APPENDIX 4

### CASE STUDY CHURCHES

The following churches met the criteria for this study. They have experienced a relay succession during the study period (1994 through 2009) and the average attendance was least 150 people at the time of the transition. When conducting the interviews with each informant, anonymity was granted to allow as much freedom as possible to share each respective viewpoint. The study churches are listed here to provide further validity to the research but without connecting the particular churches to the informants or their responses as quoted throughout the research.

## **Case Study Churches**

Evangel Cathedral Church of God

Heritage Community Church

Lochlyn Church of God

Praise Cathedral Church of God



## APPENDIX 5

### RESEARCH PROCESS

The research process is provided in the following table for the purpose of giving a visual representation of the phases needed to complete this research.

Table A1. Research Process

Phase	Element	Date
Phase 1: Define and Design	Literature Review	October 2009 - September 2010
	Study Church Selection	January 2011 - March 2011
	Protocol Development and Evaluation	January 2011 - March 2011
Phase 2: Prepare, Collect, and Analyze the Data	Site Visits	April 2011 - June 2011
	Transcribe Interviews	April 2011 - June 2011
	Study Site Reports	April 2011 - June 2011
Phase 3: Present Findings	Cross-Case Analysis	June 2011 - August 2011

## APPENDIX 6

### STUDY CHURCH INTERVIEWS

To further provide validity to the research, the following table is provided for the purpose of giving a visual representation of the site visits and method of interviewing each informant. The researcher visited every area in person where each church was located and every effort was made to conduct all interviews in person; however, two telephone interviews were necessary due to one informant traveling out of the country for an extended period and another who was caring for a spouse with a life-threatening illness.

Table A2. Study Church Interviews

Church	Informant	Interview Date
Church-A	Incumbent-A	April 28, 2011
	Successor-A	April 28, 2011
	Overseer-A	April 28, 2011
Church-B	Incumbent-B	March 24, 2011
	Successor-B	March 24, 2011
	Overseer-B	May 2, 2011
Church-C	Incumbent-C	March 24, 2011
	Successor-C	March 24, 2011
	Overseer-C	April 20, 2011
Church-D	Incumbent-D	May 3, 2011
	Successor-D	May 2, 2011
	Overseer-D	May 2, 2011

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## ABSTRACT

### RELAY SUCCESSION IN THE SENIOR PASTORATE: A MULTIPLE CASE STUDY METHOD

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The Southern Baptist Theological Seminary, 2011  
Chairperson: Dr. Brian C. Richardson

The purpose of this research was to articulate the process and principles of relay succession in the senior pastorate within the Church of God (COG). The research was accomplished through three phases and four case studies.

The first phase—define and design—sought to review the precedent literature and begin the development of a case study protocol with embedded interviews. The interview was subject to review by an expert panel and approved by the chairperson of the dissertation committee. The second phase—prepare, collect, and analyze—included completing the case study protocol, collecting data at each individual case study site, writing individual case study reports and analyzing the data. In the final stage, analyze and present findings, the researcher sought to complete a cross-case analysis and present the findings according to the research purpose in order to answer the four research questions.

**KEYWORDS:** Succession, Pastor, Church, Leadership, Relay, Case Study



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