Leadership Transitions: What the Nonprofit World Can Teach Us

by Donna Schaper

Leadership transition is not a concern for congregations alone. The nonprofit world is also mightily interested in the subject. I had the privilege of joining a dozen nonprofit executives at the New School for Management and Urban Policy for a full semester in spring of 2008. The seminar was titled "Leading after the Founder." It was really about being a leader who follows a leader, not just a founding leader. The subject was transition.

I call myself a nonprofit executive in a secondary sense. I am a parish pastor, but I also manage a nonprofit. Although I was the only member of the clergy in this mixed group of arts directors, and heads of social services organizations and advocacy organizations, most of whom had budgets closer to eight million than eight hundred thousand (my own operating number), a great deal of what was taught applied directly to me and the kinds of institutions I have served. The issue that bore particular resonance was how we, as leaders, create teams over generations. Are we condemned to be solo acts or are there practices that would help us create partnerships across leadership generations?

Similarities and Differences

There are many differences as well as similarities between parishes and not-for-profits. In common, they all exist for something larger than a profit, thus the apt if clumsy way of defining organizations by what they *don't* do as "nonprofits." The similarities include a lower-paid work force—often less trained for the specific tasks at hand, technologically two or three generations behind those in other organizations, and more relationally employed so that firing people is harder. They also include a certain disdain for administration, as though the how of what we do is less important than what we do. Nevertheless, there is a bricks-without-straw issue at the heart of much work that is more missional than profit-making. We don't want "high" administrative costs, whatever they are. Parishes and not-for-profit organizations also have a common suffering: we are always behind. Who can claim to have saved the world or ended poverty? Our goals are lofty, our means of achieving them less so.

Where parishes and not-for-profits differ is mostly historical. The role of parish pastor and priest is simply longer and better known than that of the executive director. George Bernanos *did* not write a best-selling book called "The Diary of a Country Executive Director." Role expectations for clergy are multifarious; for not-for-profit executive

directors they are as well, but with fewer projections. Executive directors are not to represent God, keep secrets, hatch, match, or dispatch—much less attend to the mystery of everyday human existence. Executive directors do public speaking every now and then, maybe once a month. Parish pastors do it every week. Finally, the differences involve transcendent realities and our commitments to them. Executive directors are in certain ways the secular version of parish ministers.

Here I offer some reflection, gleaned from the luxurious experience of reflection on administrative leadership in a borrowed context for a term.

Generational shift is a theme in both denominational and congregational life as well as the political and not-for-profit world. In the not-for-profit world, 57 percent of executive directors are leaving by 2010, the remainder by 2020. The majority of executive directors are over fifty. A third of them are either founders or have been in the organization for more than ten years. Not-for-profit boards are composed largely of boomers as well.

Similar demographics pertain denomination by denomination. They are joined by nearly constant generational anxiety, evidenced by only the rare parish meeting where someone doesn't bring up the "young people" and their absence in our congregations.

The length of stay in a pastorate is decreasing, too, as is the length of stay for an executive director. This pattern alone creates even more transition.

Turnover protocols, customs, and rules become very important in this context. We have only to note the tremendous successes of interim ministry and the Interim Ministry Network to underscore transition as a theme in ministry.

Approaches to Transition

The not-for-profit world is quite different than the world of church when it comes to leadership transitions. In the nonprofit world, "retiring" executives often stay on as codirectors with the new director. They also often choose their own successors. They rarely leave in full and sometimes remain on the board of directors. Thus the protocols in this world are teamwork across generations, on-the-job training of new leaders, and promoting from within. The advantages nonprofits see in these practices include retention of organizational memory, the use of trial periods to test out new leaders, and the opportunity to have former leaders share their knowledge with new ones.

In the church, we often prohibit associate or assistant pastors from moving up. Hiring from within may have advantages in not-for-profits, but it does not necessarily have them in congregations. Pastors need social capital. On the first day of any ministry, we may have the most social capital we are ever going to have. It often decreases over time as projected hopes are not realized: the church may not grow; the problem in the family may not be solved. An assistant who moves up will have no honeymoon. These realities underscore the need for pastors to name their own criteria for success and to resist projections. We are not magicians; we are pastors. Some of us have the good fortune and the skills to increase our social capital over time. Sometimes this increase comes from institutional memory and on-the-job training. In other words, moving people up from within can be a very good thing for a healthy congregation but a less good thing for a not-so-healthy one. Any move, internal or external, should be carefully negotiated with all parties, especially the congregation as a whole. Changing a person's role in an

organization can be very difficult without careful negotiation, introduction of the change to all parties, and changed behavior in the person who is changing his or her role. But negotiate, negotiate, negotiate, communicate, communicate, communicate, and it can be done.

Still, moving up from within is all but prohibited in many denominations. It is the rare exception when it is encouraged or permitted. In my denomination, the United Church of Christ, as well as many others, "boundary theory" has been the key norm developed for transitions. It means—in my vernacular—that the former pastor is to leave the current pastor alone. He or she is to move on, or out, or both. The departing pastor is not to meddle. In other words, we ask people for whom congregational relationships are central to their lives and identities to get lost when they move on or retire. The contrast with the nonprofit world is keen; there the "elder" has respect. In our system, the "elder" is pastured.

There are obvious losses and gains in both approaches. In the practice of getting the former pastor out of the way as much as possible, we lose team ministry over the generations. We lose institutional memory. For example, one particularly difficult parishioner was bugging me constantly for my first two years in one parish. When I happened upon the "disappeared" former minister, I asked him if he had ever had any difficulty with this person. "Oh, all the time" was his way-too-late response. In the practice of nonpartnership, the former minister's wisdom is assumed to be insufficient for the current moment. This disrespect for the aged and the saged is a problem.

On the other hand, having the former pastor around is also a burden. In particular, it makes relationships with the congregation hard to form. The competition can be intense. When it comes to trust, our relationships are never the same at years one, two, or three as they are at years ten, eleven, and twelve, so a new pastor's relationships will not be as deep as those of a former, long-tenured pastor. If the previous pastor stays around, the parishioner has little chance for closure on the old relationship, thus all but prohibiting an in-depth relationship with the new pastor.

Former pastors who return to do funerals, weddings, or baptisms—or who maintain social relationships, even at a distance, much less offering counseling by phone to their former parishioners—can do tremendous harm to a start-up ministry. They can keep trust at bay. Often the only reasons a pastor would continue pastoral relationships with a former congregation is his or her own ego and unmanaged grief. I run into many pastors who tell me they are in a grieving stage over their last appointment. I personally took nearly three years to get over one much beloved congregation.

In the middle of this tension, nonprofits are a helpful model. Sometimes they give the retiring director power in the secession process. This appointment model gives the "newbie" some borrowed trust and legitimacy. Sometimes former directors stay on as codirectors or board members. The other participants in my class had all experienced some version of this and had not liked it. It seems that all the issues pastors face in making new relationships or putting their stamp on their own organization are present for executive directors as well. However, they did say it was often useful for the organization because of the value of institutional memory.

A Frame of Reference

A lot depends on the particulars of any given situation. All are different! Thus reaching for norms and protocols is somewhat dangerous. I am going to try to do so—but first let me describe several situations that inform me.

In my current circumstance, the former pastor was here for ten years, the previous pastor for thirty-five. The younger person was able to build new relationships elsewhere. He was not totally dependent on the community here for his life network. In the previous pastor's case, that was not possible. He was too richly connected to this community —despite his second home on the other side of the country—to leave. Thus I have "violated" boundary theory and invited my colleague to, in his retirement, be a part of the community he founded. He is emeritus pastor. He also preaches, lectures, and involves himself in the life of the congregation. I get several advantages from this arrangement. So does he.

I get my elder close by. It doesn't hurt that I admire and respect him—and that he is very careful not to get in the way. I do lose the ability to make some pastoral relationships, but I also get a great wind at my back. The retired pastor alerts me to problem people or to passages that other pastoral ships have found it difficult to traverse. More than any of these individuated things, I get a sense of team. I like the idea that we are ministering to the same legacy and the same future together. We do not represent generational divide; we represent generational teamwork.

Having reported this somewhat rosy picture of teamwork, let me present a contrasting one. In another parish I led, one night at a particularly gruesome trustees meeting during which one trustee mentioned the previous pastor just one too many times, I blurted out, "I think I am tired of hearing how much better in bed your former wife was." What then happened was very interesting. First of all, I never heard about the former pastor again. People just stopped referring to him. They got the message. Secondly, I had a bevy of institutional problems related to his forced disappearance. Some money disappeared. A lot of commitment disappeared. There was rupture with a history that people had treasured. Particularly for me as a woman, this rupture with a popular man only highlighted my gender for people who were trying very hard to forget that I was a woman. I would not say my outburst was a successful intervention, all things considered.

One more context matters. A successful long-term pastor in my denomination invited me to "succeed" him. He had the power to make the appointment, according to him and the chair of the board, who met with me together. I would come on as designated "heir" to the senior minister role and he would stay on for two years, training me. We would work together, me preaching three times a month, him once a month. At the end of two years, he would leave, for good. This kind of secession is more typical of a nonprofit than a church. I said no, based on something in my gut that said it wasn't going to work. I really didn't think he would "let go" and I really didn't think I would be his match. In other words, I wanted my own stage, on which both to succeed and fail, not a shared one.

Developing Norms

My current circumstance is a good one; two others were not. What does that mean in the development of norms? It means that norm one is to assess the individual situation, the individuals themselves, and determine what capacities we have to maximize. Norm two is to employ intergenerational teamwork, norm three to honor institutional memory, and norm four to self-differentiate from each other and the parish. Let me spell these four

principles out in normative or norm-making language.

1. **Individual differences.** Only you and your church's former pastor know who you are, what you want, and whether you are mature enough to get it. Negotiate, negotiate, and negotiate. Be sure members of the parish are listening in and hearing your mutual self-definition. Mutual self-definition may sound like a contradiction. It is not. We get to know ourselves by other people's responses to us and vice versa. Self-definition is not an individual matter but a group process. You may or may not need police in the form of denominational executives or a pastor/parish relations committee that helps you monitor the situation. You do need partners, even if they are only your clergy support group or a few friends who know what you are trying to do.

2. **Intergenerational teamwork.** When I left a former parish, at my farewell ceremony a rabbi friend gave the following advice to the congregation and to me: "We won't know what Donna accomplished here until much later in your life. We'll know what she built after she is gone. The evidence will be you and who you become as a congregation." This is wisdom. I stand on the shoulders of what my predecessors did and did not build. Those who follow me will stand on what I did or did not build. We share our successes—and our failures. They are not ours alone. One value that I want in my ministry is elder respect. I want it because it is Godly, it is right, it is fair—and nothing undercuts unbridled capitalism so much as caring for those who are perceived as no longer useful. Elders are useful. That is one point we make in intergenerational teamwork over time. One of the Benedictine rules for monasteries sums this point up: "The juniors, therefore, should honor their seniors, and the seniors love their juniors."[1]

3. **Institutional memory.** Parishes are intergenerational, long-term organizations. No one knows a parish that knows only its present moment. What has already happened matters. Much that has already happened lives in the land of the secret or the confidential, which is rarely as confidential as people might imagine it to be. Being able to tell stories across generational lines can be extraordinarily helpful to a parish, a pastor, and a retired pastor. Telling our history is healing. Hearing our history is healing. It creates a narrative line where some might only see a chaotic bunch of blips on a screen.

4. **Self-differentiation or boundary theory.** There are many difficulties in having the former pastor around or even nearby. There are also many advantages. A negotiated relationship is the best we may hope for. Many pastors love to blame the "past" or the "culture" or the "system"—by which they mean the former pastor—for their failure in the present. Sometimes our predecessor becomes our excuse. Other times the former pastor is so immature and needy that he/she can't go away. In such situations outside help is essential. I believe that negotiating this circumstance is one of the great missions of denominations. Our denominations need to minister to the retiring or transitioning pastor.

How these four principles matter to what any given congregation should do is up to that congregation and its denominational associates and their norms. Nevertheless, they

deserve mention and reflection at the time of transition from leader to leader, whether that transition is hiring an assistant or associate, from within or from outside, or hiring a senior after a long- or short-term pastorate. What matters is the reflection as much as the action. Too often we rush into doing things the way we think they should be done—like hiring an interim or refusing to hire an interim, or just grabbing onto the closest leader and making sure we don't have to go through any "empty" time. What should be done is a matter of reflection and careful, negotiated choices. One size does not fit all. There are great values in the "fertile void" of leadership as well. Taking time to grieve matters, as does taking time to welcome and train.

By the way, after long reflection, the congregation that wanted to let the former minister choose and train his successor got an interim. Then they got another interim. Many people will be glad to tell you they have been "unintentional" interims. When a congregation refuses reflection on transition, many unintentional things happen. While nonprofits may do things differently, they still do them. We can learn a lot from many worlds.

NOTE1. *St. Benedict's Rules for Monasteries* (Liturgical Press, Collegeville, MN), 89.

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