



NAVIGATING PASTORAL TRANSITIONS

A FIELD GUIDE SERIES FOR CONGREGATIONS AND PASTORS

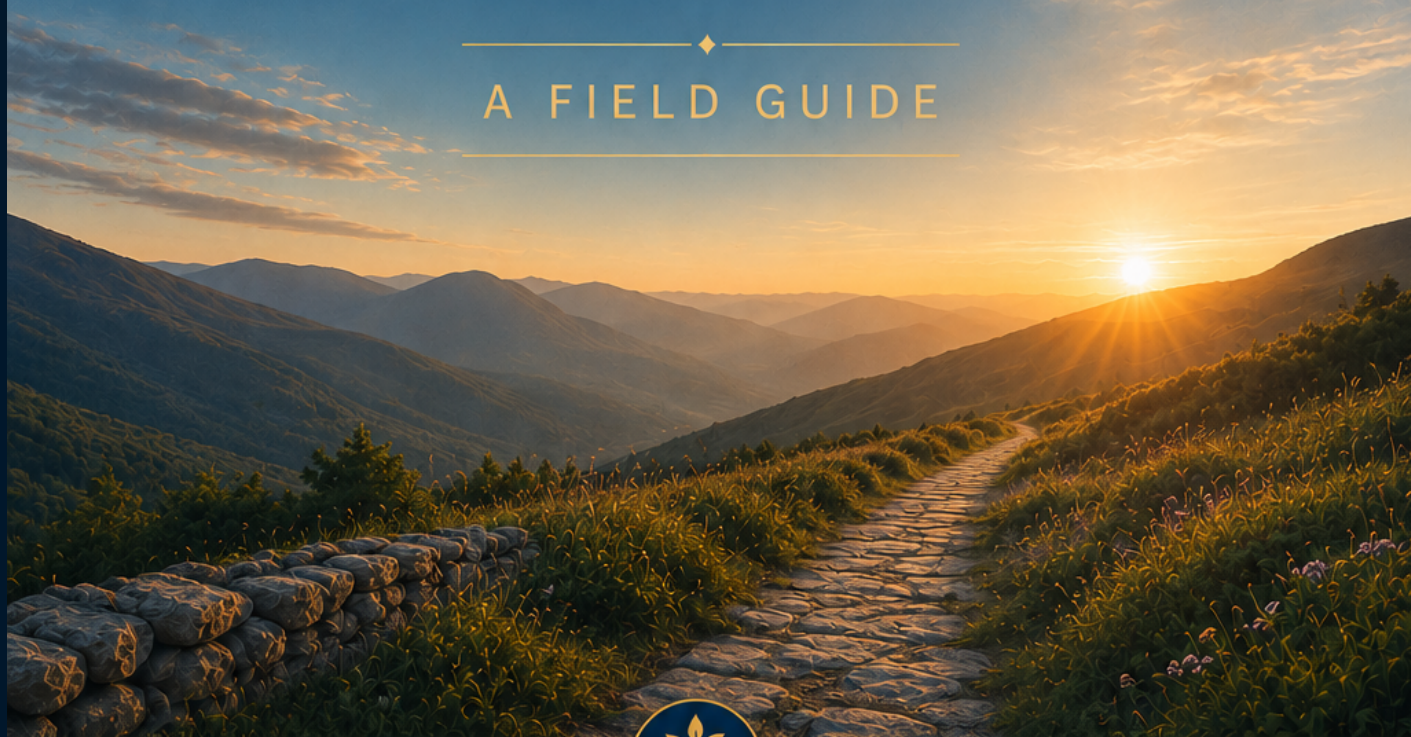
PREPARING

A FIELD GUIDE



SPIRITUAL PREPARATION.
FORMING HOPE.
PLANTING FOR
WHAT'S NEXT.

A FIELD GUIDE



HELPING PASTORS AND CONGREGATIONS
DISCERN THE WAY FORWARD—TOGETHER

NAVIGATING PASTORAL TRANSITIONS

PREPARING

FIELD GUIDE

Preparing a congregation for faithful participation, discernment, and the work ahead

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Introduction

Before the Work Begins

The pastor has left, or the final days of the pastoral relationship are approaching.

Necessary arrangements have been made.

Someone will preach on Sunday.

Pastoral care is covered.

Staff members know who will supervise their work.

The congregation knows whom to call when someone enters the hospital, a family experiences a death, or an unexpected decision must be made.

At least, that is the hope.

Much of this immediate work belongs to ending well. Responsibilities are transferred. Authority is clarified. Records and information are handed to those who will need them. The departing pastor and congregation say goodbye, release one another, and begin living within the boundaries of a relationship that has changed.

Eventually, however, the congregation arrives at a different question.

How do we prepare for the work ahead?

That question may arise almost immediately.

Some members will already be thinking about the next pastor. They will wonder when a search committee will be elected, how long the process will take, and whether someone has begun writing the position description.

Others will be less eager to move forward. They may still be grieving the pastor's departure, adjusting to unfamiliar worship leadership, or trying to understand what has changed.

Some will feel hopeful, others anxious or relieved, and some may not yet have given the transition much thought at all.

A congregation does not enter this season with one shared emotional response. Neither does it begin with one shared understanding of what should happen next.

That is why preparation matters.

Preparation Is More Than Continuing to Function

A congregation needs immediate continuity after a pastor leaves.

Worship must continue.

Pastoral needs must be met.

Staff must be supervised.

Bills must be paid.

Decisions must be made.

Those responsibilities are real, and attending to them creates stability at a vulnerable time.

But keeping the congregation functioning is not the whole work of preparation.

A congregation can maintain its calendar, hold its meetings, and arrange Sunday leadership without becoming ready for the deeper work of transition. It can remain busy while avoiding the questions this season will eventually ask.

Who will guide the transition?

How will the congregation participate?

What kind of conversations will be needed?

Whose voices are usually heard?

Whose voices are easily missed?

How will leaders communicate when they do not yet have answers?

What will help people speak honestly without turning every difference into a conflict?

How will the congregation make enough room in its common life for this work?

What practices will help people remain attentive to God rather than being driven by urgency?

These questions reach beyond the handoff.

They belong to the congregation that remains.

Ending well transferred responsibility from the departing pastor. Preparing asks how the congregation will now carry that responsibility together.

The Search Is Not Yet the Work

The desire to begin searching is understandable.

A congregation may associate the presence of a settled pastor with stability. Members may believe that once the position is advertised, something important is finally happening. Leaders may feel pressure to demonstrate progress. Staff members may hope that new pastoral leadership will relieve uncertainty and additional responsibilities.

The vacancy can begin to feel like the central problem.

Finding a pastor can begin to feel like the solution.

But a congregation is not prepared to search faithfully simply because it is eager to begin.

Before seeking new pastoral leadership, the congregation will need to remember the story that has shaped it. It will need to listen to its members, its neighbors, and the community it has been called to serve. It will need to recognize its gifts, challenges, vocation, and emerging hopes. Only then can it describe itself honestly and consider what kind of pastoral leadership may complement the ministry God is already forming.

Those movements will come in their proper time.

They do not belong to this Guide.

Preparing does not ask the congregation to interpret its history, conduct listening sessions, define its future, write a Ministry Discernment Profile, or begin evaluating prospective pastors.

It prepares the congregation to undertake those things faithfully when their time comes.

That distinction protects the work ahead.

If a congregation begins remembering before people understand the purpose of the conversation, the result may become little more than nostalgia.

If it begins listening without deciding whose voices matter or how differences will be received, the most familiar voices may dominate.

If it begins writing a profile before deeper reflection has occurred, the congregation may describe the church it wishes others would see rather than the congregation it actually is.

If it begins searching before it has learned anything new about itself, it may simply look for someone who resembles the pastor who left—or someone who seems to be that pastor's opposite.

Preparation does not delay the real work.

Preparation makes the real work possible.

Preparing the People, Not Only the Process

Transitions require structure.

Someone must coordinate the work. Responsibilities must be clear. Denominational requirements must be understood. Leaders must decide whether an internal or external facilitator is needed. Meetings must be scheduled. Communication must be planned.

But the process will only be as healthy as the relationships carrying it.

A technically excellent plan cannot make people listen to one another.

A carefully designed meeting cannot guarantee honesty. A skilled facilitator cannot create curiosity, a communication schedule cannot manufacture trust, and a timeline cannot decide when the congregation has listened deeply enough to move forward.

Preparation therefore attends to both structure and spirit.

It helps leaders ask not only:

What must we do?

but also:

How will we be with one another while we do it?

Will people be permitted to speak from different experiences?

Will disagreement be treated as information or as disloyalty?

Will questions be welcomed?

Will leaders be honest about what they know and what they do not know?

Will the congregation make room for people who participate quietly, irregularly, or from the edges of its life?

Will staff members be treated as people with knowledge and vulnerability rather than simply as the ones who keep everything operating?

Will prayer open the congregation to God, or will spiritual language be used to hurry people toward a preferred conclusion?

These questions reveal the deeper purpose of preparation.

The congregation is preparing more than a process.

It is preparing to become a community capable of discernment.

The search will come.

Before the search, there will be remembering.

There will be listening.

There will be questions about identity, vocation, community, and hope.

Before those conversations begin, the congregation pauses here.

Not to repeat the goodbye.

Not to hurry toward the next pastor.

But to make room, establish trust, clarify responsibility, and prepare to walk together.

That is the work before the work.

And it is where the next faithful movement begins.

For Conversation

1. What is the difference between keeping the congregation functioning and preparing it for the transition work ahead?
2. What pressures might cause our congregation to begin searching before it is ready?
3. What relational, organizational, or spiritual conditions will help our congregation participate faithfully?
4. What may need to be simplified, paused, or released so that we can make room for this season's work?

Chapter One

Recognizing the Season We Have Entered

The farewell has ended, immediate responsibilities have been transferred, and congregational life continues. Yet the congregation is not simply carrying on without a pastor. It has entered a different season.

Recognizing that season is the first work of preparation.

More Than a Vacancy

A vacancy is an empty position.

A transition is a community learning how to live, lead, listen, and discern after one season of ministry has ended and before another has fully begun.

The distinction matters.

If the congregation understands its situation primarily as a vacancy, attention will naturally turn toward filling the position. The central problem appears to be the absence of a pastor. The logical solution is to find another one as quickly as possible.

That understanding is not large enough for the season the congregation has entered.

The congregation is not merely missing someone who once performed certain duties. It is living through a change in relationships, authority, expectations, habits, and identity.

A pastor may have served as the person who knew the congregation's history, interpreted its conflicts, held relationships together, represented it in the community, guided its worship, supervised its staff, and helped leaders decide what deserved attention.

Some of those responsibilities have been transferred.

Others may need to be carried differently.

Some may never have belonged entirely to the pastor, although years of practice made it appear that they did.

A transition makes those realities visible.

The empty position is only one part of what has changed.

The Congregation Is Still the Church

During a pastoral transition, people sometimes begin speaking as though the congregation has been suspended.

“We are just trying to keep things going.”

“We cannot make any important decisions until the next pastor arrives.”

“We are in a holding pattern.”

“We will deal with that when we have a pastor again.”

Some caution is wise. A congregation should not use the interval between pastors to make unnecessary decisions that properly belong within a future pastoral relationship. Neither should it launch major initiatives simply to prove that it remains active.

But the congregation has not ceased to be the church.

It still worships.

It still prays.

It still cares for people.

It still serves its neighbors.

It still teaches children and adults.

It still welcomes strangers.

It still makes decisions.

It still bears witness to the love of God.

Pastoral leadership matters deeply. Congregations should not minimize the gifts, responsibilities, and vocation of those called to serve them.

But the church does not exist because a particular pastoral office is currently filled. Its life is held in Christ and shared among the whole people of God.

This is not merely a reassuring idea.

It is a responsibility.

The congregation cannot place its life on hold while waiting for someone else to arrive. The transition itself becomes part of its present ministry.

There are people to love now.

There is worship to offer now.

There are neighbors to serve now.

There are decisions to make now.

There is also a congregation to prepare now.

Different People Enter at Different Times

A transition has an official beginning.

The pastor announces a departure.

A governing body takes formal action.

A final date is established.

The congregation gathers for worship, celebration, release, and goodbye.

But people do not all enter the transition emotionally or spiritually on the same day.

Some began anticipating it months earlier. They noticed signs that a change was coming or were involved in conversations before a public announcement could be made.

Some begin imagining the future as soon as the departure is announced.

Others do not experience the ending fully until the pastor's office is empty or another person stands in the pulpit.

Some will feel ready for congregational work almost immediately.

Others will need time before they can give it their full attention.

Staff members may enter the transition differently from members. Their working relationships, routines, workload, and professional futures may have changed at once.

Longtime members may experience the ending through decades of accumulated relationships.

Newer members may have little history with the departing pastor and may not understand the intensity of other people's reactions.

Children and youth may know only that a familiar person is no longer present.

People who participated occasionally may learn about the transition well after congregational leaders believe everyone has heard.

These differences do not mean that some people care more faithfully than others.

They mean that congregations experience change unevenly.

Leaders should expect that unevenness.

A congregation does not need to wait until every person feels equally ready. That moment will never come.

It does need to avoid treating one group's readiness as though it represents everyone.

Familiar Patterns No Longer Work in the Same Way

Transitions reveal how much congregational life depends upon habits no one has needed to name.

A committee chair may have known that the pastor would settle a disagreement after the meeting.

A staff member may have relied on an informal conversation each Tuesday morning to receive approval for the week's work.

A member may have contacted the pastor directly whenever something felt wrong.

A community leader may have assumed the pastor spoke for the congregation.

A governing body may have depended on the pastor to determine which issues were ready for decision.

When the pastor leaves, the responsibilities may be reassigned. The habits surrounding them do not change as quickly.

People may continue looking toward an absent center.

They ask what the former pastor would have done.

They wait for temporary pastoral leadership to assume every responsibility.

They expect staff members to know what happens next.

They turn to the same few lay leaders for every decision.

They discover that formal authority and actual practice were not always the same.

Some of this was addressed through the handoff. Information, access, immediate duties, and essential responsibilities were transferred.

But a handoff cannot reveal every pattern.

Some arrangements become visible only after the pastor is gone.

A decision reaches a point where no one knows who may make it.

A ministry discovers that an important community relationship depended entirely on the former pastor.

A staff member realizes that a routine responsibility was never formally assigned.

A member seeks pastoral care through an old pathway that no longer exists.

These discoveries should not automatically be treated as evidence that the handoff failed.

They are part of learning what the transition has changed.

The task is not to recreate the pastor's former place through another person. It is to notice where clarity is still needed and allow current leadership to respond.

The Temptation to Restore Familiarity

Uncertainty is uncomfortable.

When familiar structures disappear, congregations naturally try to restore them.

Temporary leaders may be asked to function exactly like the former pastor.

A staff member may become the unofficial source of pastoral authority.

A longtime officer may begin making decisions that properly belong to the governing body.

The congregation may search for someone whose presence will make everything feel normal again.

These responses are understandable. Familiarity creates a sense of safety.

But the purpose of preparation is not to restore the arrangement that existed before the departure.

That arrangement belonged to a particular pastoral relationship.

The congregation now needs enough stability to function and enough openness to learn.

If every gap is filled immediately, the congregation may miss what the gap reveals.

Perhaps authority had become too concentrated.

Perhaps staff members carried responsibilities that were never acknowledged.

Perhaps members became accustomed to receiving ministry rather than sharing it.

Perhaps a program depended more heavily on the pastor than anyone recognized.

Perhaps leaders had stopped practicing gifts because the pastor exercised those gifts so consistently.

None of these conclusions should be assumed at the beginning.

They belong to later reflection.

For now, the congregation simply notices:

Things do not work exactly as they did before.

That recognition is not a crisis.

It is part of entering the new season honestly.

Living Between What Was and What Will Be

A congregation in transition lives between two pastoral relationships.

The former ministry has ended.

The next ministry has not yet begun.

This interval is sometimes called an in-between or liminal season—a time in which one familiar identity has loosened before another has taken shape.

The language can sound abstract.

The experience is ordinary.

People know what it is to leave one home before feeling settled in another.

A student graduates before knowing what adult life will become.

A person retires and discovers that ending a career does not immediately reveal the shape of the next season.

A family welcomes a child and finds that familiar routines no longer fit, even though new ones have not yet developed.

The old arrangement cannot simply continue.

The new arrangement cannot yet be known.

Congregational transition has that same quality.

This in-between season is not comfortable for everyone. It may feel inefficient. It can seem as though the congregation should be further along than it is.

But uncertainty does not mean the congregation is lost.

It means some knowledge can come only through the journey.

It does not yet know what it will understand after remembering its story, what it will hear from its members and community, what hopes will become clearer, or whose vocation may eventually join its own.

Preparation asks the congregation not to manufacture those answers prematurely.

There will be time to name the future.

For now, the congregation learns to inhabit the present.

We Are Here

Maps often include a small mark accompanied by three simple words:

You are here.

The mark neither describes the whole road nor removes its difficult terrain. It provides orientation.

Recognizing the season serves the same purpose.

The congregation is no longer concluding the former pastoral relationship, even though some feelings and practical matters may remain.

It is not yet searching for the next pastor, even though questions about future leadership have already begun.

It stands between those movements.

The congregation is here:

maintaining its ministry,

learning what has changed,

clarifying what still needs attention,

making room for varied responses,

and preparing to undertake deeper work together.

There is no need to rush past this recognition.

A congregation that knows where it is can stop pretending that it should already be somewhere else.

It can receive this season without making it permanent.

It can attend to what is needed without demanding every answer.

It can remain the church without knowing who its next pastor will be.

And it can begin preparing—not because the future is clear, but because God remains present in the place where the congregation now stands.

For Conversation

1. In what ways has our congregation changed beyond the absence of the former pastor?
2. Where are familiar patterns no longer working as they once did, and what might require greater clarity?
3. What different emotions or expectations are people bringing into this season?
4. What would help us receive this transition as meaningful ministry rather than merely a vacancy to fill?

Chapter Two

Organizing Leadership for the Work Ahead

The congregation already has leaders.

A governing body is in place.

Staff members continue their work.

Pastoral coverage has been arranged.

Denominational representatives may already be involved.

Responsibilities once held by the departing pastor have been transferred, at least for the immediate future.

Those arrangements allow the congregation to continue functioning.

The next question is different.

Who will hold the work of transition?

This is not simply a question about who will schedule meetings or prepare reports. It is a question about how responsibility, authority, participation, and guidance will be related throughout the season ahead.

Without clarity, transition work can begin to belong to everyone and no one at the same time.

The governing body assumes a small team is handling it.

The small team assumes the staff will provide direction.

Staff members assume the denominational representative will tell the congregation what to do.

Members assume a search committee has already begun working.

Informal leaders begin shaping decisions because no one knows where those decisions properly belong.

The problem is not usually a lack of commitment.

It is a lack of shared understanding.

Preparing well means organizing leadership before the deeper congregational work begins.

Immediate Leadership and Transition Leadership Are Not the Same

The first days after a pastor's departure require immediate decisions.

Who will preach?

Who will provide pastoral care?

Who supervises staff?

Who moderates meetings?

Who signs documents?

Who responds when something unexpected happens?

Those questions belong to the handoff and immediate post-departure arrangements addressed in *Ending Well*.

Transition leadership has another purpose.

It holds the longer work through which the congregation will remember, listen, discern, describe its ministry, and eventually seek new pastoral leadership.

The people responsible for Sunday coverage may not be the people best equipped to facilitate congregational conversation.

The person supervising staff may not be the person who should coordinate broad participation.

The governing body may hold final authority without personally leading every part of the process.

A denominational representative may interpret policy and provide guidance without managing the congregation's daily work.

A temporary pastor may support the transition without controlling its conclusions.

Recognizing these distinctions keeps the congregation from assuming that whoever is currently available must carry everything.

Authority Must Be Clear

Every tradition has its own polity.

In some congregations, authority rests primarily with a session, council, vestry, consistory, board, or another governing body. In others, significant responsibility is shared with a presbytery, conference, diocese, association, regional body, or denominational office.

The names vary.

The need for clarity does not.

Before the transition work moves very far, leaders should understand:

- which decisions belong to the congregation;
- which belong to the governing body;
- which require denominational approval;
- which may be entrusted to a transition team;
- which belong to staff or temporary pastoral leadership;
- which will eventually belong to a search or nominating committee; and
- which decisions should not yet be made.

This does not require every possible situation to be anticipated.

It does require enough clarity that people know where questions belong.

Authority becomes especially important when people disagree.

When expectations are shared, disagreement can be addressed through an understood process. When authority is vague, disagreement quickly becomes a contest over who has the right to decide.

One group believes the governing body has acted beyond its responsibility.

Another believes members are attempting to control decisions entrusted to elected leaders.

Staff members receive conflicting instructions.

The denomination is consulted only after a decision has already been made.

A team asked to facilitate conversation begins making decisions it was never authorized to make.

These problems are easier to prevent than to repair.

Clear authority will not eliminate disagreement.

It does give disagreement an appropriate place to go.

The Governing Body Holds the Whole

The governing body ordinarily carries responsibility for the congregation's life throughout the transition.

That does not mean it must perform every task.

In fact, a governing body that tries to lead every conversation, manage every communication, coordinate every meeting, address every practical concern, and make every decision may quickly become overwhelmed.

Its role is to hold the whole.

Holding the whole includes:

- understanding the purpose of each movement;
- maintaining the integrity of the process;
- ensuring that responsibilities are assigned clearly;
- attending to denominational requirements;
- providing appropriate resources;
- protecting broad and meaningful participation;
- communicating honestly with the congregation;
- supporting staff and other leaders;
- recognizing when outside help is needed;
- receiving the work entrusted to teams or facilitators; and
- making the decisions that properly belong to it.

This kind of leadership requires both involvement and restraint.

The governing body must remain engaged enough to exercise responsibility.

It must also resist controlling every conversation or predetermining what the congregation will discover.

Leaders may enter transition with strong convictions about what the congregation needs. Their experience matters. Their judgment matters. Their authority matters.

But transition leadership is not permission to secure a preferred future before the congregation has been allowed to listen and discern.

The governing body creates the conditions for faithful work.

It does not manufacture the answer.

A Team May Need to Hold the Process

Many congregations benefit from identifying a small group to coordinate the transition work.

Its name may vary:

transition team,

preparation team,

discernment coordinating team,

transition leadership group,

or something similar.

The name matters less than the clarity of its purpose.

Such a team might help:

- coordinate the sequence of the work;
- maintain communication with the governing body;
- work with a facilitator;
- prepare the congregation for participation;
- identify voices or groups that might otherwise be missed;
- attend to the practical conditions needed for gatherings;
- notice when the congregation is moving too quickly or losing momentum;
- gather questions that require a response; and
- help the different movements of the transition remain connected.

The team should not become a second governing body.

It should not assume responsibilities belonging to a future search committee.

It should not decide what the congregation's story means before the congregation has remembered together.

It should not determine the congregation's future mission before listening has occurred.

It should not quietly draft the profile or identify preferred candidates.

Its work is to help the process remain coherent, participatory, and faithful.

In some congregations, the governing body may be small enough to carry this coordinating role itself.

In others, forming another team would create unnecessary complexity.

A small congregation should not imitate the committee structure of a much larger church simply because it appears more complete.

The question is not:

How many teams should we form?

The question is:

What structure will help this congregation hold the work responsibly without confusing authority or exhausting its leaders?

Gifts Matter

Transition leadership requires particular gifts.

Some people are skilled organizers. They can hold many details, anticipate what needs attention, and move work toward completion.

Some are trusted across congregational differences.

Some listen without needing to correct every statement.

Some can explain complicated processes in ordinary language.

Some remain calm when uncertainty rises.

Some recognize who has not been heard.

Some can distinguish an urgent matter from an anxious demand.

Some are willing to ask for help.

Some keep the spiritual purpose of the transition visible when administrative tasks begin to dominate.

No single person will carry all these gifts.

That is one reason leadership should be shared.

It is also why transition leadership should not be assigned only by office, seniority, popularity, or availability.

The people who have led most of the congregation's work in the past may offer essential wisdom. They may also be tired.

A person may be an excellent financial officer without being suited to facilitating difficult conversation.

A gifted public speaker may not be a careful listener.

A beloved longtime member may carry deep knowledge of the congregation while finding it difficult to imagine practices different from those already known.

A newer member may see patterns others overlook but lack important historical context.

These are not disqualifications.

They are reminders that leadership is communal.

The goal is not to find perfect leaders.

It is to bring together gifts that allow people to strengthen, question, and support one another.

Staff Have Knowledge but Should Not Carry the Process Alone

Staff members often hold knowledge that transition leaders need.

They know how communication actually reaches people.

They know which ministries depend upon particular relationships.

They know where congregational systems function smoothly and where they do not.

They may recognize tensions or patterns invisible to elected leaders.

Their insight should be invited and respected.

But staff should not be made responsible for carrying the congregation through the entire transition simply because they remain present.

Their work may already have expanded.

They may be navigating new supervision, changed expectations, and uncertainty about future leadership. They may also find themselves in an awkward position when congregational members expect information that staff are not authorized to provide.

Staff participation therefore needs clarity.

Are staff members serving as advisers?

Are they members of the transition team?

Are they providing administrative support?

Are they expected to participate in congregational conversations as staff, as members, or both?

Who supervises transition-related work?

What additional responsibilities are reasonable?

What work will be adjusted if transition duties are added?

These questions are not another handoff.

They concern the conditions under which staff will participate in the work ahead.

Staff knowledge is a gift to the process.

It should not become an excuse to place the congregation's responsibility on those whose employment may make it difficult to refuse.

The Search Committee Does Not Need to Carry Everything

The possibility of a new pastor attracts attention.

For that reason, congregations sometimes form a search or nominating committee as early as possible and then expect it to lead the entire transition.

That can place the committee in an impossible position.

A search committee has a distinct and important vocation. It will eventually help articulate the call, engage prospective pastors, conduct interviews, check references, practice mutual discernment, and recommend new leadership according to the congregation's polity.

That work should grow from what the congregation has already learned.

If the search committee is asked to lead remembering, conduct all congregational listening, determine future priorities, write the profile, manage communication, educate the congregation, and search for candidates, too much authority and responsibility become concentrated in one group.

The committee may begin making decisions before the congregation has participated meaningfully.

It may feel pressure to turn every conversation toward the question, "What does this tell us about the pastor we need?"

That question will matter.

It should not govern the transition from the beginning.

The congregation's story deserves to be remembered before it becomes material for a search.

The community deserves to be heard before its needs become qualifications in a position description.

The congregation deserves to consider its own vocation before asking someone else to lead it.

Preparation protects those movements from being reduced to preliminary search activities.

Leadership Must Remain Accountable

Transition work often involves small groups carrying significant responsibility between meetings of the governing body or congregation.

That makes accountability essential.

Accountability does not mean that every minor action requires formal approval. Nor does it mean leaders should be mistrusted until they prove themselves.

It means that entrusted work remains connected to the community that entrusted it.

People should know:

- what a team has been asked to do;
- what it has not been authorized to do;
- to whom it reports;
- how decisions will be made;
- how the congregation will receive information;
- how questions may be raised; and
- what will happen when the team encounters something beyond its authority.

Accountability protects both the congregation and the people serving it.

It keeps leaders from carrying expectations they never agreed to bear.

It gives them a place to take difficult questions.

It prevents informal influence from quietly becoming decision-making authority.

It also allows the congregation to trust the process without needing to observe every conversation.

Trust does not grow from secrecy.

Neither does it require constant access to every detail.

It grows when responsibilities are clear, communication is dependable, and leaders act within the authority they have received.

Leadership Without Possession

People can become deeply invested in transition work.

That investment is necessary.

It can also create a subtle sense of ownership.

Leaders begin speaking of “our process,” “our profile,” “our candidate,” or “our plan.” They may become protective of decisions they have made or impatient with members who enter the conversation later.

The work can begin to feel as though it belongs to those who have given it the most time.

But transition leadership is stewardship.

The governing body does not own the congregation’s future.

A transition team does not own the process.

A facilitator does not own the conversation.

A denominational representative does not own the outcome.

A search committee will not own the call.

Each is entrusted with particular work for the sake of the whole congregation and the ministry of Christ.

That understanding changes how leadership is exercised.

Stewards explain, listen, remain accountable, and make the decisions entrusted to them. They refrain from decisions that belong to others, revise plans when new wisdom emerges, and do not need the outcome to confirm their importance.

The work matters too much to belong to any one person or group.

Enough Structure to Begin

A congregation does not need its entire transition structure completed before any work can begin.

Some responsibilities will become clearer through experience.

Some teams may be temporary.

Some people will discover gifts they did not know they had.

Some arrangements will need to change.

Preparation is not an attempt to design a structure that will eliminate every surprise.

It provides enough clarity for the congregation to begin without relying on assumption.

Who holds final authority?

Who coordinates the work?

Who represents the wider church?

Who will help facilitate the congregation's conversations?

How will staff participate?

How will leaders remain accountable?

How will the congregation know what is happening?

Those questions do not yet tell the congregation what it will discover.

They establish who will care for the work of discovery.

When leadership is clear, the congregation is freer to participate.

When responsibility is shared, no one person has to carry the whole transition.

When authority is understood, disagreement has somewhere faithful to go.

When leadership is treated as stewardship, the future remains open to wisdom that has not yet emerged.

The purpose is not a perfect organization.

It is a trustworthy way for the congregation to undertake the work ahead.

For Conversation

1. What transition responsibilities now extend beyond the immediate handoffs already completed?
2. Which decisions belong to our governing body, our wider denominational body, a transition team, staff, or other leaders—and where does authority remain unclear?
3. What gifts will be needed among those who coordinate the transition, and whose gifts might easily be overlooked?
4. What structure would help us share responsibility and remain accountable without creating unnecessary committees or exhausting the same leaders?

Chapter Three

Receiving the Help We Need

Congregations are accustomed to helping others.

They organize meals, visit people who are ill, support families in crisis, welcome neighbors, and respond to needs throughout the community.

Asking for help can feel less natural.

A congregation entering pastoral transition may assume that its leaders should already know how to proceed. After all, they know the congregation. They understand its people, history, ministries, and culture. They have led through difficult seasons before.

That knowledge matters.

But knowing the congregation is not the same as knowing how to guide a congregation through transition.

A pastoral transition asks leaders to carry responsibilities they may encounter only once or twice in a lifetime. Denominational representatives, transitional pastors, and experienced facilitators may have accompanied many congregations through the same kind of season.

Their experience does not give them the answers for this congregation.

It may help this congregation ask better questions.

Receiving help is not giving away the work.

It is one way the congregation prepares to do its own work faithfully.

Experience Changes What We Can See

A congregation experiences its transition from the inside.

Its leaders know which relationships are trusted, which events shaped the congregation, which ministries matter deeply, and which subjects require care. They understand words, memories, and habits that would mean little to an outsider.

That inside knowledge is essential.

It also has limits.

People who live within a system naturally become accustomed to it. They may no longer notice patterns that appear immediately to someone entering from outside.

A congregation may consider a particular way of making decisions normal because it has always worked that way.

Leaders may assume everyone understands how information is shared.

A familiar disagreement may seem unavoidable.

A small group may appear representative because it has carried responsibility for many years.

A subject may be avoided so consistently that no one notices the silence anymore.

An experienced guide can sometimes see what familiarity conceals.

The guide may recognize that a conversation repeatedly returns to the same unresolved question.

The guide may notice that several people are speaking while others have not been invited into the room.

The guide may hear that members are using the same word to mean different things.

The guide may recognize anxiety being expressed as urgency.

The guide may ask why something is done a particular way when everyone inside the congregation has stopped asking.

Outside perspective is not automatically wiser than local knowledge.

It is simply different.

Healthy guidance brings the two together.

The congregation knows its life; the guide knows something about transition. Together they may see more clearly.

Help Is Not One Thing

A congregation may need several kinds of help during transition.

These should not be confused.

Denominational leaders may interpret polity, describe required actions, authorize parts of the process, and connect the congregation with wider resources.

A temporary or transitional pastor may provide worship leadership, pastoral care, staff support, congregational leadership, and guidance appropriate to that particular call.

A facilitator may design and guide conversations so that people can participate, listen, and reflect together.

A consultant may bring specialized knowledge about a particular concern.

A mediator may help people address conflict.

A therapist or other qualified professional may provide care when individuals or groups are dealing with trauma, grief, or concerns beyond the appropriate role of congregational leaders.

An attorney, accountant, safeguarding professional, or other specialist may be needed when the transition involves legal, financial, employment, misconduct, or safety concerns.

No one person should be expected to carry all these roles.

A facilitator is not automatically a mediator. A temporary pastor may not be a transition specialist. A denominational representative need not lead every congregational gathering; a trusted leader is not a therapist; and a consultant should not quietly begin governing.

Confusion about roles creates confusion about authority and expectations.

Before seeking help, the congregation should understand what kind of help it actually needs.

What a Facilitator Does

Much of the work ahead will happen through conversation.

The congregation will remember.

It will listen.

It will encounter different experiences and interpretations.

It will begin giving language to its identity, vocation, community, and hope.

These conversations require more than someone willing to call on raised hands.

A facilitator helps create the conditions in which a group can do meaningful work together.

The facilitator may:

- help clarify the purpose of a gathering;
- design a process appropriate to that purpose;
- frame questions that invite reflection rather than predetermined answers;
- create multiple ways for people to participate;
- help members listen to experiences different from their own;
- notice whose voices are present and whose are missing;
- keep the conversation connected to its purpose;
- slow the group when it moves toward conclusions too quickly;
- name patterns emerging across several conversations;
- help leaders distinguish disagreement from breakdown;
- identify questions requiring further attention; and
- return the work to the congregation for discernment.

A facilitator does not arrive with the congregation's future already defined.

The facilitator does not decide which memories are correct.

The facilitator does not tell the congregation what its mission should be.

The facilitator does not determine what kind of pastor it needs.

The facilitator does not eliminate discomfort.

The facilitator does not make difficult differences disappear.

The facilitator helps the congregation hear more of its own life with greater clarity.

Good facilitation makes participation possible without claiming ownership of what emerges.

Guidance Without Control

Congregations sometimes want a guide who will tell them what to do.

The desire is understandable.

Uncertainty is tiring. Leaders may long for someone with experience to provide the correct plan, ask the correct questions, and identify the correct conclusion.

A guide can offer structure.

A guide can recommend practices.

A guide can warn the congregation about common problems.

A guide can help leaders understand why one movement should precede another.

A guide can say when a conversation is not yet ready to be concluded.

What the guide cannot do is discern on behalf of the congregation.

The call of the congregation belongs to the congregation.

Its story must be remembered by the people who have lived it.

Its community must be encountered by those called to serve there.

Its future cannot be imported from a model that worked somewhere else.

The congregation may receive substantial help without surrendering responsibility.

That distinction should be clear from the beginning.

If a guide has too little authority, the person may be expected to manage difficult conversations without enough support to do so.

If a guide has too much authority, congregational leaders may become passive or use the guide's recommendations to avoid responsibility for their own decisions.

The healthiest relationship avoids both control and distance.

It is a partnership held by clear boundaries.

Internal or External Guidance

Some congregations have people within their own membership who are skilled in facilitation, organizational leadership, education, group process, or discernment.

An internal facilitator brings valuable strengths.

The person already understands the congregation's language and culture.

Members may know and trust them.

They may require less time to understand relationships and history.

Their presence may make the process feel less formal.

Internal facilitation also carries challenges.

The facilitator is part of the congregation.

They have their own history, relationships, opinions, hopes, and disappointments.

Other members may assume they know where the facilitator stands, whether or not the assumption is accurate.

The facilitator may find it difficult to guide a conversation while also participating honestly in it.

People may hesitate to speak freely in front of someone they experience as aligned with a particular group.

The facilitator may also carry another leadership office that complicates the role.

An external facilitator brings a different set of strengths.

The person may enter without established loyalties.

They can ask questions insiders no longer think to ask.

They may recognize common transition patterns.

They may be freer to name what they observe.

An external facilitator also has limitations.

They do not know the congregation's life.

They may misunderstand local language or underestimate the importance of particular experiences.

Trust will need to be built.

They may rely too heavily on a familiar process developed for other settings.

Neither internal nor external facilitation is inherently superior.

The question is what this congregation and this season require.

A congregation with strong trust and experienced internal leadership may be served well from within.

A congregation marked by conflict, factions, staff tension, a painful departure, or distrust of established leaders may need someone from outside.

Some congregations may use both: an external facilitator to guide significant congregational conversations and an internal team to coordinate participation, communication, and follow-up.

The choice should be made according to the work, not simply according to convenience.

Trust Matters More Than Technique

Facilitation involves skills.

A guide needs to know how to frame questions, organize participation, manage time, summarize what has been heard, and respond when a conversation becomes difficult.

But technique alone is not enough.

The congregation must be able to trust the person guiding the work.

That trust does not require everyone to know the guide personally.

It does require confidence that the guide will serve the process rather than a private agenda.

A trustworthy guide:

- listens before prescribing;
- respects the congregation without flattering it;
- explains the purpose of the process;
- is honest about the limits of their role;
- does not promise outcomes they cannot guarantee;

- protects participation without avoiding difficult truth;
- recognizes differences in power;
- handles confidential information appropriately;
- does not use spiritual language to silence disagreement;
- distinguishes facilitation from therapy, mediation, and investigation;
- remains accountable to the leaders who entrusted the work;
- welcomes appropriate questions about the process; and
- is willing to say when another kind of help is needed.

Congregations should pay attention to how a potential guide speaks about other churches.

Someone who tells dramatic stories about previous congregations, discloses private information, or presents themselves as the hero of every difficult process may not be prepared to hold this congregation's trust.

Experience matters, and character matters more.

The Guide Must Be Free Enough to Guide

A facilitator needs a clear relationship with the congregation's leadership.

Who invited the facilitator?

To whom is the facilitator accountable?

What work has the person been asked to lead?

What decisions remain with the governing body?

How will concerns be raised?

What information may be shared?

How will the congregation be told about the facilitator's role?

These questions protect everyone involved.

They also reveal another important requirement: the facilitator must have enough freedom to do the work honestly.

A congregation may say it wants open conversation while expecting the facilitator to avoid particular subjects.

Leaders may ask for broad participation but become uncomfortable when unfamiliar perspectives emerge.

A governing body may invite the congregation to speak and then expect the facilitator to produce conclusions that confirm decisions already made.

A facilitator asked to create the appearance of participation cannot serve the congregation well.

Neither can a facilitator who ignores appropriate authority and begins directing the congregation independently.

The relationship requires a shared commitment.

The governing body authorizes the work and remains responsible for it.

The facilitator guides the work with integrity.

The congregation participates without being promised that every suggestion will become a decision.

Clear expectations make that partnership possible.

When Ordinary Facilitation Is Not Enough

Some transitions carry circumstances that require more than ordinary congregational conversation.

A pastor may have left after serious conflict.

Staff members may feel unsafe.

Members may be divided into entrenched groups.

Allegations of misconduct may be unresolved.

People may have experienced abuse, harassment, financial wrongdoing, or betrayal by trusted leaders.

The congregation may have lived through a traumatic event.

In such situations, gathering everyone in a room to “share openly” may not be wise.

Facilitation is not investigation.

Congregational conversation is not a substitute for accountability.

Prayer is not a substitute for safeguarding.

A listening session is not therapy.

Reconciliation cannot be demanded before truth, safety, and responsibility have been addressed.

Congregational leaders need enough humility to recognize when the work has moved beyond their competence or beyond the role of an ordinary transition guide.

Specialized help may be necessary.

That help may come from denominational authorities, mediators, trauma-informed consultants, therapists, safeguarding professionals, legal counsel, or others qualified for the concern involved.

Seeking specialized help does not mean the congregation has failed at transition.

It means leaders understand the seriousness of what has been entrusted to them.

The purpose is not to make the difficult history disappear so the search can begin.

It is to address what must be addressed before ordinary discernment can proceed faithfully.

Help Must Fit the Congregation

Transition processes are often accompanied by models.

There may be recommended stages, standard meeting designs, sample questions, surveys, retreats, reports, and timelines.

These resources can be useful.

They can also become burdens when treated as requirements regardless of context.

A rural congregation of forty members does not need the same participation structure as a congregation with several thousand people and multiple worshipping communities.

A congregation with significant staff may require conversations that do not apply to a church with one part-time employee.

A multilingual or multicultural congregation may need more than translated materials. Its process may need to recognize different expectations about authority, storytelling, time, disagreement, and participation.

A congregation whose members are geographically dispersed may need forms of engagement beyond in-person meetings.

A church whose leaders are exhausted may need a simpler process carried over a longer period.

A congregation that already practices broad communal discernment may need less preparation for participation than one whose decisions have traditionally been concentrated among a few leaders.

A good guide adapts the process without abandoning its purpose.

The purpose is not to complete every possible activity.

It is to help the congregation participate honestly enough to understand itself, listen faithfully enough to notice its community, and discern patiently enough to recognize its vocation.

Methods serve that purpose.

The purpose does not serve the methods.

Receiving Help as an Act of Wisdom

There is a kind of confidence that refuses help because it believes capable people should manage on their own.

There is another kind that receives help because it understands the importance of the work.

The second is more useful in transition.

A congregation does not honor its own wisdom by refusing every outside perspective.

Neither does it honor outside experience by surrendering its discernment.

It brings local knowledge and experienced guidance into conversation.

The congregation can say:

This is our life. Help us see it more clearly.

This is our work. Help us create conditions in which we can do it faithfully.

This is our responsibility. Help us recognize what we do not yet understand.

That is not dependence.

It is partnership.

The congregation remains responsible for where the journey leads.

But it does not need to walk without companions.

Field Manual Resource: FM 3.1 — Transition Guidance and Facilitator Discernment Worksheet

For Conversation

1. What kind of guidance does our congregation need for the work ahead, and what kind of help would not fit our situation?
2. Would internal, external, or shared facilitation best serve our congregation, and what leads us to that judgment?
3. What authority and freedom will a facilitator need, and what responsibilities must remain with the congregation's leaders?
4. Are there conflicts, harms, or specialized concerns that require support beyond ordinary transition facilitation?

Chapter Four

Preparing the Congregation to Participate

A pastoral transition belongs to the whole congregation.

That does not mean every member will attend every gathering, serve on a team, or decide every question by congregational vote.

It means that the congregation's identity, vocation, and future cannot be discerned faithfully by a small group working alone.

Leaders will carry particular responsibilities.

Facilitators may guide conversations.

Staff members will contribute knowledge.

A future Pastor Nominating Committee or search committee will undertake work entrusted specifically to it.

But the wisdom needed for transition is distributed across the congregation.

People know different parts of its life.

They experience its ministries from different places.

They carry different memories.

They see different gifts, needs, and possibilities.

Preparing for participation means creating a process through which more of that wisdom can become available to the whole.

Participation Does Not Mean Everyone Decides Everything

Congregations sometimes speak of participation without defining what it means.

Members may be invited to a meeting and assume they are being asked to make a decision. Leaders may believe they are gathering perspectives but have not explained how those perspectives will be used. People offer suggestions and later feel ignored when every suggestion does not appear in the final outcome.

Disappointment grows where expectations were never clear.

Meaningful participation can take several forms.

People may be invited to:

- share experiences;
- tell stories;
- identify concerns;
- describe what they notice;
- respond to questions;
- listen to perspectives different from their own;
- offer ideas;
- name hopes;
- reflect on emerging themes;
- provide feedback; or
- make a decision when the decision properly belongs to the congregation.

These forms of participation are not interchangeable.

Sharing an experience is different from voting on a proposal.

Offering an idea is different from directing a committee.

Giving feedback is different from holding final authority.

Leaders serve the congregation well when they explain the purpose of each invitation.

Why are we gathering?

What are people being asked to contribute?

Who will receive what emerges?

How will it be used?

What decision, if any, will follow?

Who has authority to make that decision?

What will participants hear afterward?

Clarity does not diminish participation.

It makes participation trustworthy.

The Congregation Knows More Than Any Committee

A governing body may understand the formal responsibilities of the church.

Staff members may know how the congregation's ministries function from week to week.

Longtime members may carry decades of history.

Newer members may remember clearly what it felt like to enter the congregation for the first time.

Parents may see how church life intersects with the demands placed on families.

Children and youth may know whether they experience themselves as participants or as an audience for programs designed by adults.

Homebound members may understand forms of connection and isolation others overlook.

Community partners may experience the congregation in ways members never see.

People who participate irregularly may notice barriers invisible to those who know every routine.

No single group carries the whole truth of the congregation.

This is not a criticism of leadership.

It is the nature of community.

Every person sees from somewhere.

The congregation becomes more visible to itself when those partial perspectives are brought into relationship.

This is why a transition cannot be reduced to the work of a few highly capable people. A small group may produce an efficient process. It may even produce an accurate description of the congregation as its leaders experience it.

But the congregation is larger than the experience of its leaders.

Preparation asks how the wisdom of the whole community will be invited into the work ahead.

Participation Must Be More Than Attendance

Congregational leaders often measure participation by counting who came to a meeting.

Attendance matters.

It is not the only measure.

A person may attend and never speak.

A member may speak often without listening.

A room may be full while important parts of the congregation remain absent.

A well-attended gathering may still be shaped primarily by the people most comfortable speaking in public.

Meaningful participation asks more than:

How many people were present?

It also asks:

Who was able to contribute?

Who was heard?

What forms of participation were available?

Whose experience was not present?

What did participants understand about the work?

How will what they offered be carried forward?

Some people think aloud. They discover what they believe by speaking.

Others need time to reflect before responding.

Some are comfortable in a large group.

Others speak more honestly in a small conversation.

Some communicate best in writing or through images, stories, and shared activities; others need questions in advance.

Some need transportation, childcare, interpretation, accessible space, hearing assistance, remote access, or another practical form of support before participation is possible.

A process that offers only one way to participate will repeatedly hear from the people best suited to that method.

Preparing well means designing more than one doorway into the conversation.

The Most Visible Voices Are Not the Whole Congregation

Every congregation has people whose voices carry particular influence.

Some hold formal office.

Some have served for many years.

Some give generously.

Some are skilled speakers.

Some belong to families woven deeply into the congregation's history.

Some have earned trust through faithful service.

Their wisdom should be received.

Their prominence should not be mistaken for completeness.

A congregation may also include people who speak rarely because they do not expect to be heard.

Some have learned that disagreement brings relational consequences.

Some are new and do not believe they have enough history to contribute.

Some are younger than the people who usually make decisions.

Some participate differently because of culture, language, disability, work schedules, caregiving responsibilities, or previous experiences with church leadership.

Some once offered ideas and saw no evidence that anyone listened.

Some remain connected to the congregation while standing near its edges.

Leaders should not assume that silence means satisfaction.

Neither should they assume that every silent person is carrying an unspoken grievance.

Silence is not one thing.

It may express agreement, uncertainty, caution, fatigue, reflection, fear, disengagement, or simply a preference not to speak in that setting.

The task is not to interpret silence from a distance.

It is to create appropriate opportunities through which people may respond.

Broad Participation Requires Particular Invitation

A general announcement may be technically open to everyone and still reach only the congregation's customary participants.

"The entire congregation is invited" sounds inclusive.

In practice, the people who attend may be the same people who attend everything.

Broad participation often requires particular invitation.

Someone may need to tell a teenager, "Your experience of this congregation matters."

A newer member may need to hear, “You do not need decades of history to tell us what you have noticed.”

A homebound member may need someone to bring the conversation to them.

A person who has stepped back from congregational involvement may need to know that participation is welcome without being pressured.

A staff member may need clarity about whether they are being invited as an employee, a ministry leader, a congregational member, or some combination of those roles.

A community partner may need to be asked a question that only someone outside the congregation can answer.

Particular invitation communicates that participation is not merely permitted.

It is desired.

This does not mean pursuing people until they agree to participate. An invitation can be genuine without becoming pressure.

People should be free to decline.

They should not be treated as disloyal if they do not attend.

Nor should leaders assume that those who decline have nothing to contribute. Timing, trust, energy, accessibility, and the form of the invitation all affect participation.

The goal is not compulsory involvement.

It is the removal of unnecessary barriers.

Participation and Power

Not every person enters congregational conversation with the same freedom.

Formal titles matter.

Employment relationships matter.

Family connections matter.

Financial influence matters.

Age, race, gender, class, disability, education, language, and social standing may affect whose words are received as credible.

A statement made by a longtime officer may be heard differently from the same statement made by a teenager or recent member.

A staff member may hesitate to speak honestly in the presence of the people who supervise their employment.

A member may remain silent because someone involved in a painful experience is sitting across the room.

A person from a group historically overlooked by the congregation may reasonably question whether this invitation will be different.

Preparing for participation requires attention to these realities.

It does not require treating every relationship as a struggle for power.

It does require recognizing that an open microphone does not create equal freedom to speak.

Sometimes people need separate spaces.

Sometimes anonymous or private responses are appropriate.

Sometimes staff members need a conversation in which their supervisors are not present.

Sometimes children and youth need questions designed for them rather than a simplified version of an adult meeting.

Sometimes leaders need to listen without responding immediately.

Sometimes a facilitator must name that one voice is taking so much room that others cannot enter.

Participation is not broadened merely by allowing everyone to speak.

It is broadened when the structure helps more people speak with reasonable confidence that their contribution can be received.

Do Not Ask People to Participate in a Conclusion Already Reached

Few things weaken trust more quickly than a process that appears open but is designed to confirm a decision already made.

Leaders may enter transition with sincere convictions.

They may believe the congregation needs a particular kind of pastor.

They may have a preferred structure, direction, or priority.

They may be right.

But if the stated purpose is discernment, the outcome cannot be entirely protected from what the congregation discovers.

People recognize when they are being led toward a predetermined answer.

The questions are narrow.

Certain responses are welcomed more warmly than others.

Difficult observations are redirected.

Reports emphasize comments that support the preferred direction.

Participants are thanked for their input, but no one explains what happened to it.

Eventually people learn that participation means lending legitimacy to someone else's decision.

That is not discernment.

There will be decisions that properly belong to leaders. Those decisions should be named honestly as leadership decisions.

There will be requirements that are not open for congregational revision. Those requirements should be explained.

There will be questions on which the congregation is being consulted but does not hold final authority. That limitation should be clear.

Honesty about the limits of participation is more respectful than creating the appearance of control where none exists.

When a question is genuinely open, leaders must be willing to receive an answer they did not expect.

Participation Carries Responsibility

Members should know that meaningful participation asks something of them.

It asks people to speak from their own experience rather than claiming to represent everyone.

It asks them to distinguish what they know from what they have heard.

It asks them to listen without preparing an immediate rebuttal.

It asks them to respect confidential and personnel boundaries.

It asks them to remain curious when someone describes the congregation differently.

It asks them not to turn every preference into a requirement for the next pastor.

It asks them to allow their first response to mature through conversation and prayer.

It asks them to stay connected to the process even when every decision does not go their way.

Participation is not simply the opportunity to express an opinion.

It is a willingness to contribute to the congregation's discernment.

That contribution may include speaking.

It may also include listening, questioning, reflecting, praying, reconsidering, and allowing the community's wisdom to become larger than any individual preference.

Leaders can help by explaining these responsibilities before difficult conversations begin.

Tell People What Happened to What They Shared

Participation does not end when the meeting closes.

People need to know that their contributions went somewhere.

They may not need a transcript of every statement.

They do need appropriate evidence that the congregation's participation mattered.

Leaders can report:

- how many people or groups participated;
- what broad themes were heard;
- where significant differences remain;
- what questions require further attention;
- what information will be carried into the next movement;
- what decisions were made;
- what decisions were not made; and
- what will happen next.

This reporting should not expose private comments or reduce minority perspectives to insignificance merely because fewer people expressed them.

A theme mentioned by many people may deserve attention.

So may an experience named by only one or two people, especially if those people occupy a part of congregational life that is easily overlooked.

The purpose of reporting is not to count votes unless a vote was actually taken.

It is to help the congregation recognize what its participation has made visible.

When people can see how their contributions entered the process, trust grows.

When nothing returns, even a well-designed gathering can feel extractive.

Preparing to Hear the Congregation

This chapter does not ask the congregation to begin remembering its history.

It does not initiate a listening process.

It does not ask members to define the congregation's identity or future.

Those conversations belong to the movements ahead.

The present task is to prepare the way.

Who will be invited?

What will participation mean?

What forms will allow different people to contribute?

What barriers need attention?

How will power affect the room?

What responsibilities will participants carry?

How will leaders report what they hear?

What can the congregation realistically sustain?

These questions matter because the congregation will soon be asked to listen to its own life.

The quality of that listening will depend partly on who was prepared to participate and whether they believed their participation was real.

No process will reach everyone.

No gathering will eliminate differences in influence, confidence, or availability.

No invitation will produce perfect representation.

Faithfulness does not require perfection.

It requires intention.

The congregation prepares to participate by making the invitation broad, the purpose clear, the expectations honest, and the pathways accessible.

Then it trusts that wisdom may come from places its leaders did not expect.

Field Manual Resource: FM 4.1 — Congregational Participation Planner

For Conversation

1. Whose participation comes easily in our congregation, and whose experience might be missed without a particular invitation?
2. What should people understand about how their contributions will be used and where final authority will remain?
3. What barriers—practical, relational, cultural, or organizational—could prevent meaningful participation?
4. What forms of participation would allow our congregation to hear more than the voices most comfortable speaking in meetings?

Chapter Five

Creating Conditions for Honest Conversation

Inviting people to speak does not guarantee that they will speak honestly.

A congregation may schedule listening sessions, distribute questions, gather around tables, and assure everyone that all perspectives are welcome.

Still, people make judgments before they speak.

Is it safe to say this here?

Will anyone listen?

Will I be treated differently afterward?

Does someone in this room have authority over me?

Has the answer already been decided?

Will my words be repeated without my permission?

Will disagreement be interpreted as disloyalty?

Would silence be easier?

These questions may never be spoken aloud.

They shape the conversation anyway.

Preparation cannot guarantee that every person will speak freely. It can create conditions in which honesty becomes more possible and less costly.

That work begins before the first significant congregational conversation.

Honesty Has a Different Purpose Now

Ending Well invited the pastor and congregation to tell the truth about the ministry they had shared. That honesty made room for gratitude and disappointment, faithfulness and failure, affection and hurt.

The honesty needed now has a different purpose.

The congregation is preparing to listen to itself.

Soon members will remember the story that has shaped them. They will encounter different experiences of congregational life. They will listen to their community and begin discerning what God may be asking of them.

Those conversations cannot be sustained by politeness alone.

People will need to speak about what they value.

They may also need to name what they find difficult.

They may describe the same ministry differently.

They may disagree about which parts of the congregation's story deserve attention.

They may discover that words such as *welcoming*, *traditional*, *missional*, *family*, *community*, or *growth* mean different things to different people.

Honesty in this season is not another evaluation of the former pastor.

It is a willingness to describe congregational life as people actually experience it.

The purpose is not to render a verdict but to make truthful discernment possible.

A Safe Conversation Is Not a Comfortable Conversation

Congregations often say they want a safe place for conversation.

The desire is good.

The meaning of safety needs care.

A safe conversation is not one in which no one feels uncomfortable.

Honest reflection may unsettle familiar stories. A member may hear that an experience considered warm and welcoming by some felt confusing or excluding to someone else. A ministry deeply valued by its leaders may have had little meaning for other participants. A tradition understood as central to the congregation's identity may feel inaccessible to people who arrived more recently.

Discomfort can be part of learning.

Safety means something different.

People should not be humiliated, threatened, pressured to disclose more than they wish, or punished for offering a perspective that differs from the majority. They should be protected from harassment, retaliation, and conversations that become abusive.

Personal information should not be handled carelessly.

Differences should not be turned into attacks on character or faithfulness.

A safe conversation allows appropriate discomfort while protecting human dignity.

Leaders should not promise that the work will always feel easy.

They should commit themselves to ensuring that difficulty is handled with care.

Trust Cannot Be Announced into Being

A leader may begin a gathering by saying, “This is a safe space.”

The words do not make it so.

People decide whether a conversation is trustworthy by watching what leaders do.

Do leaders explain how the information will be used?

Do they listen differently to people with whom they disagree?

Do they become defensive when a difficult concern is named?

Do they interrupt personal attacks?

Do they protect staff members from being placed in inappropriate positions?

Do they report accurately what they heard?

Do they acknowledge perspectives that do not fit the dominant account?

Do they keep the promises they make about privacy?

Do they admit when they do not know what to do next?

Trust grows through these ordinary practices.

It may also be limited by history.

People bring previous experiences into every new invitation.

If earlier congregational conversations ended without follow-up, members may assume this one will also disappear.

If leaders have asked for input after decisions were effectively complete, people may question whether participation is genuine.

If disagreement has resulted in damaged relationships, members may protect themselves through silence.

If confidential information has been mishandled, another assurance of privacy will not immediately restore confidence.

Leaders cannot demand trust because their intentions are good.

They can act in trustworthy ways and allow trust to grow.

Clarify the Kind of Conversation

Not every gathering has the same purpose.

Some conversations seek understanding.

Some gather experiences.

Some generate ideas.

Some identify questions.

Some offer feedback on emerging work.

Some prepare for a decision.

Some are the setting in which a decision is actually made.

When the purpose is unclear, people participate according to different assumptions.

One person believes the group is brainstorming and offers an imaginative possibility.

Another hears the suggestion as a proposal requiring immediate debate.

Someone shares a personal experience.

Another responds as though the experience were an accusation that must be disproved.

A facilitator asks a question intended to deepen reflection.

Participants assume the question reveals the conclusion leaders want.

Clarity about purpose helps people know how to participate.

At the beginning of a gathering, leaders should be able to say:

- why the conversation is being held;
- what question is before the group;
- what is not being decided;
- how contributions will be received;
- what record, if any, will be kept;
- who will receive the results;
- what will happen afterward; and
- where concerns outside the scope of the gathering should go.

A conversation becomes more honest when people know what kind of conversation they are having.

Speak from Experience

Congregational conversations become difficult when people make claims about everyone.

“People are saying...” “No one wants...” “Everyone knows...” “The congregation has always...” “The younger members think...” “The older members will never...”

These statements give one person’s perception the appearance of a community-wide conclusion.

They are also difficult to explore. Who are “people”? Which younger members? How do we know what no one wants?

A healthier practice is to speak from experience.

“I have heard...” “I have noticed...” “My experience has been...” “What matters to me is...” “I am concerned that...” “I understand this differently...”

Speaking from experience does not make every statement factually accurate or every conclusion equally wise.

It makes the source of the statement more honest.

The person is no longer claiming authority over experiences that belong to others.

This practice also allows apparently conflicting accounts to remain in the conversation.

One member may say:

I experienced that ministry as one of the most welcoming parts of our congregation.

Another may say:

I attended twice and could not understand how to become involved.

The second experience does not erase the first.

The first does not disprove the second.

Placed together, they give the congregation a fuller understanding of the ministry.

Listen Before Explaining

Congregations often respond to difficult observations by explaining them.

A newer member says a practice was confusing.

A leader explains its history.

A parent says an event was difficult for families.

An organizer explains how hard volunteers worked.

A community partner says the congregation's communication was unclear.

Someone explains what the church intended.

The explanations may all be accurate.

They may also prevent listening.

When people explain too quickly, they shift attention from the experience being described to the defense of the congregation's intentions.

Intentions matter.

Experiences matter too.

Listening does not require immediate agreement. It asks the group to understand what someone is trying to communicate before deciding how to respond.

Helpful questions may include:

- Can you tell us more about what you experienced?
- What made that moment significant for you?
- When have you noticed this most clearly?
- What do you wish others understood?
- Is there something we may be missing?
- What did you need that was not available?
- What part of this experience do you most want us to hear?

These questions are not an interrogation.

They are an invitation to greater clarity.

Only after the group has listened should it begin considering what the experience may mean.

Curiosity Makes Room for Difference

Anxiety wants quick categories.

Right or wrong.

Supportive or disloyal.

Positive or negative.

For us or against us.

Curiosity slows that judgment.

It asks what may be learned before deciding what must be defended.

This does not mean the congregation treats every claim as equally reliable. Some statements may be based on rumor. Some may misrepresent another person. Some may cross appropriate boundaries. Some may require correction.

Curiosity does not abandon judgment.

It refuses to judge before understanding.

When two people disagree, leaders can ask:

What experience is each person bringing?

Are they answering the same question?

Are they using the same words differently?

Does one perspective concern intention while the other concerns impact?

Is one describing a particular event while the other is describing a broader pattern?

What does each account help the congregation see?

Difference sometimes reveals conflict.

It may also reveal complexity.

A congregation preparing for discernment needs the capacity to remain with that complexity long enough to learn from it.

Leaders Must Be Able to Hear Difficult Things

The tone of a congregational conversation is shaped by how leaders respond when something uncomfortable is said.

If leaders become defensive, others will notice.

If they correct every unfavorable description, people will learn which answers are acceptable.

If they withdraw, dismiss, or retaliate, the invitation to honesty will close.

Leaders do not need to agree with every statement.

They may need to correct inaccurate information.

They may need to protect someone who has been spoken about unfairly.

They may need to remind the group that personnel matters cannot be discussed publicly.

They may need to stop language that is demeaning, threatening, or abusive.

But not every difficult observation requires an immediate response.

Sometimes faithful leadership simply says:

Thank you for telling us. We need time to consider what you have said.

Or:

I understand that your experience is different from mine. I want to hear it before I respond.

Or:

This raises a question we cannot resolve in this meeting, but we will not pretend it was not raised.

Leaders prepare for honest conversation partly by preparing themselves not to control it.

Confidentiality Must Be Promised Carefully

“Everything said here stays here” is a common way to begin a sensitive conversation.

It is also a promise leaders may not be able to keep.

Participants may repeat what they hear.

A facilitator may need to report broad themes.

Certain disclosures may require action.

Concerns involving abuse, threats, misconduct, safeguarding, or illegal behavior may carry reporting obligations.

Information affecting employment may need to be referred to those with personnel responsibility.

Leaders should not promise absolute confidentiality unless they can genuinely provide it.

They can establish clear expectations.

Personal stories should not be repeated outside the group without permission.

Reports should summarize themes without unnecessarily identifying individuals.

Participants should speak about their own experiences rather than disclose someone else's private information.

The facilitator should explain what notes will be kept, who will see them, and when they will be destroyed or archived.

Any limits to confidentiality should be named before people are invited to share.

Privacy supports honest conversation.

Secrecy does not.

Privacy protects personal dignity and appropriate information.

Secrecy hides decisions, prevents accountability, or asks people to carry information they should not be expected to hold.

A healthy process learns the difference.

Some Matters Do Not Belong in a Congregational Conversation

An invitation to honesty does not mean every subject should be addressed in every setting.

A listening gathering is not the place to debate an individual employee's performance.

A congregational retreat is not the place to disclose someone else's pastoral confidence.

A small group should not investigate allegations of misconduct.

A public meeting should not be used to confront someone who had no opportunity to prepare or respond.

A transition conversation cannot resolve concerns requiring legal, safeguarding, personnel, disciplinary, therapeutic, or professional attention.

When such matters arise, leaders should not silence them.

They should direct them to the appropriate process.

A leader may say:

This concern is important, but it cannot be handled responsibly in this gathering. We will make sure it is taken to the people who have authority and responsibility to address it.

That response should be followed by action.

Redirecting a concern without ensuring that it reaches an appropriate place is another form of dismissal.

Congregational conversation has limits.

Honesty includes acknowledging those limits.

Agreements Help the Congregation Return to Its Best Intentions

Before deeper transition conversations begin, the congregation may benefit from shared commitments.

These commitments should be simple enough to remember and substantial enough to guide behavior.

For example:

We will speak from our own experience.

We will listen to understand before responding.

We will distinguish what we know from what we have heard.

We will not use confidential or personnel information in public conversation.

We will make room for people who speak less often.

We will disagree with ideas without attacking people.

We will ask questions before assuming motives.

We will acknowledge that more than one experience may be true.

We will say when we do not know.

We will allow time for reflection.

We will bring serious concerns to the people responsible for addressing them.

We will remain attentive to God and to one another.

Agreements do not prevent difficult moments.

They give the facilitator and participants language for responding when the conversation begins to lose its way.

Instead of accusing someone of being disruptive, the facilitator can ask the group to return to its commitment to speak from personal experience.

Instead of ignoring an interruption, the facilitator can remind participants that the group agreed to make room for voices not yet heard.

Instead of allowing debate to accelerate, the facilitator can return the group to listening before responding.

The agreements belong to everyone.

Leaders must follow them too.

Honest Conversation Is a Practice

A congregation does not become capable of honest conversation because it adopts a set of agreements.

The capacity grows through practice.

People learn that they can disagree and remain in relationship.

Leaders discover that questions do not always need immediate answers.

Members experience being heard without being promised that every preference will prevail.

The congregation becomes more comfortable saying:

“We understand this differently.”

“We need more information.”

“We have not heard enough voices.”

“We are not ready to decide.”

“We were mistaken.”

“We need help.”

Over time, these become more than transition practices.

They become habits of congregational life.

That is one of the quiet gifts of preparation.

The congregation is not only getting ready for a series of meetings.

It is learning how to tell the truth in community.

Preparing the Ground

The deeper conversations have not yet begun.

The congregation has not yet gathered its history.

It has not yet listened broadly to members or community.

It has not yet interpreted what those conversations may reveal.

For now, it prepares the ground.

It clarifies the purpose of conversation.

It makes honest promises about privacy.

It distinguishes discomfort from harm.

It practices speaking from experience.

It learns to listen before explaining.

It recognizes which matters require another setting.

It establishes commitments to which people can return.

These preparations may seem modest.

They shape everything that follows.

A congregation cannot discern what it is unwilling to hear.

It cannot learn from voices it has made too costly to use.

It cannot speak truthfully if every difficult observation must first pass through the protection of its existing story.

Honest conversation does not require people to abandon love for the congregation.

It is one way they express that love.

They trust that the congregation is strong enough to hear the truth, humble enough to learn, and faithful enough to remain together while understanding grows.

Field Manual Resource: FM 5.1 — Agreements for Congregational Conversation

For Conversation

1. What helps people speak honestly in our congregation, and what makes honesty feel costly?
2. How do our leaders usually respond when someone describes the congregation in an unexpected or difficult way?
3. What promises about privacy and confidentiality can we make truthfully, and what limits must be explained?

4. What shared commitments would help us listen, disagree, and remain in relationship during the work ahead?

Chapter Six

Communicating Through Uncertainty

Congregations want information during a transition.

What happens next?

Who is responsible?

When will the process begin?

How long will it take?

When will a search committee be elected?

What kind of pastor will we seek?

Are there candidates already being considered?

When will the next pastor arrive?

Many of these questions cannot be answered at the beginning.

Leaders sometimes respond by waiting to communicate until they have something definite to report.

The silence is intended to prevent confusion.

It often creates more of it.

In the absence of reliable information, people construct explanations of their own. An informal comment becomes a plan. A possibility becomes a decision. One person's estimate becomes the congregation's expected timeline.

Communicating through uncertainty does not mean producing answers that do not yet exist.

It means helping the congregation understand what is known, what remains unknown, how the work is proceeding, and when people can expect to hear more.

Silence Is Not Empty

When leaders have nothing new to announce, they may assume there is nothing to communicate.

Members may experience the same silence differently.

They may wonder whether decisions are being made privately.

They may assume the transition has stalled.

They may believe leaders are withholding information.

They may conclude that no one knows what to do.

They may hear an unofficial report and accept it because no official account is available.

Silence acquires a meaning of its own.

That meaning may have little relationship to the leaders' intentions.

This does not mean the congregation needs constant updates. Too many messages can create fatigue and make every routine detail appear significant.

It does mean that communication should not occur only when a major decision has been made.

Sometimes the most useful message is simple:

The transition team met this week. No new decisions were made. We are completing the preparation needed before broader congregational conversations begin. We expect to provide the next update on _____.

Nothing dramatic has happened.

The congregation has still received something important: evidence that the work continues, clarity about its present stage, and a reliable expectation for when communication will come again.

Say What Is Known

Uncertainty becomes more manageable when it is not treated as one undivided condition.

Usually, some things are known.

The congregation may know:

- who holds authority;
- who is coordinating the transition;
- what denominational requirements apply;
- who is providing pastoral leadership;
- what work is currently underway;
- what decision will come next;
- who will make that decision;
- how members will be invited to participate; and
- when the next update will be offered.

Other things remain unknown.

The congregation may not know:

- how long every movement will take;
- what themes will emerge from remembering and listening;
- what future priorities will become clear;
- when the Ministry Discernment Profile will be complete;
- how many prospective pastors will be considered;
- who the next pastor will be; or
- when that pastor will arrive.

Leaders can distinguish these categories.

Here is what we know. Here is what has been decided and what remains open. Here is who holds responsibility, how you will be invited to participate, and when we will communicate again.

This structure cannot remove uncertainty.

It can give uncertainty boundaries.

“We Do Not Know Yet” Is an Honest Answer

Leaders may fear that admitting uncertainty will weaken confidence.

Often the opposite is true.

People do not expect leaders to know the identity of the next pastor or the exact date the search will conclude.

They do expect leaders to distinguish honest uncertainty from disorganization.

“We do not know yet” is not the end of a useful response.

It can be followed by:

That question will be addressed after the congregation completes its remembering and listening work.

Or:

The governing body has not made that decision. It will consider the matter at its next meeting.

Or:

The denomination requires several steps before a search can begin. We will explain those steps before the congregation is asked to act.

Or:

We cannot provide a reliable completion date, but we can tell you what work is underway now.

These answers show that the question has a place even if it does not yet have a conclusion.

False certainty may calm anxiety briefly.

When the promise fails, it weakens trust.

Honest uncertainty asks more patience of the congregation. It also treats people as capable of living without invented answers.

Avoid Timelines You Cannot Control

“How long will this take?” may be the most persistent question of the transition.

Leaders naturally want to be helpful.

Someone offers an estimate.

“If everything goes well, we could have a pastor by next spring.”

The sentence is heard as a promise.

As the date approaches, members begin asking what has gone wrong. Leaders feel pressure to shorten conversations or move ahead before the work is ready. A search committee begins measuring faithfulness by whether it can meet a schedule created before anyone understood the process.

A general sense of sequence is useful.

Specific dates are appropriate for work the congregation can reasonably schedule:

- when a team will be formed;
- when an orientation will occur;
- when congregational gatherings will be held;
- when a report is expected;
- when the governing body will review a recommendation; or
- when the next communication will be sent.

Other dates depend on matters no one controls.

The congregation cannot know when a suitable prospective pastor will enter the process.

It cannot know how long mutual discernment will require.

It cannot know whether an expected candidate will withdraw.

It cannot guarantee denominational approval by a particular date.

It cannot schedule the movement of the Holy Spirit.

Leaders should communicate milestones more confidently than predictions.

We are currently preparing for congregational remembering. After that work is complete, we will begin listening within the congregation and community.

That statement provides direction without pretending to know when the whole journey will end.

Communicate the Purpose, Not Only the Activity

Transition updates often become lists.

The team met.

A facilitator was selected.

Three gatherings were scheduled.

A document is being drafted.

A denominational requirement was completed.

These facts matter.

They do not always help people understand why the work matters.

If members hear only about activity, the process may feel like a series of unrelated administrative tasks.

Communication should connect the task to its purpose.

Instead of saying only:

The congregation will participate in three remembering gatherings next month.

Leaders might say:

Before we consider future pastoral leadership, we will spend time remembering the story that has shaped us. These gatherings will help us recognize enduring values, important turning points, and the ways God has formed our life together.

The second message does more than announce a meeting.

It helps people understand why participation is worth their time.

A congregation is more patient when it can see how present work prepares for what comes later.

Repetition Is Part of Communication

Leaders sometimes become tired of repeating the same information.

They have discussed the process in meetings.

They have written about it in the newsletter.

They have made announcements in worship.

Surely everyone knows.

They do not.

Some members were absent.

Some did not read the message.

Some heard it before the information mattered personally.

Some are new.

Some remember only part of what was said.

Some received the information through a channel they rarely use.

Some heard the words but interpreted them through expectations formed by another congregation's transition.

Communication during transition requires patient repetition.

The central message should remain consistent:

- where the congregation is in the process;
- what is happening now;
- why it matters;
- how people may participate;
- what has been decided;
- what remains open; and
- when the next update will come.

The wording may change.

The central message should remain.

Repetition is not evidence that communication failed.

It is one of the ways communication succeeds.

Use More Than One Doorway

Congregations rarely have one channel that reaches everyone.

An announcement in worship reaches those who are present and attentive during announcements.

Email reaches those who read congregational email.

A newsletter reaches those who open it.

Social media reaches people who use that platform and happen to see the post.

A printed letter may reach people who are less active digitally.

A telephone call may be the most reliable connection with a homebound member.

A staff meeting reaches staff but should not be the place staff first learn information that directly affects their work if earlier communication is appropriate.

A single communication can also serve different audiences differently.

A member may need a brief explanation of the next congregational gathering.

A governing body member may need a more detailed report.

Staff may need to know how the gathering affects schedules, facilities, communication, and workload.

A denominational representative may need formal documentation.

These are not competing messages.

They are different levels of information serving different responsibilities.

The facts should remain consistent even when the detail changes.

When different audiences receive conflicting accounts, trust begins to fracture.

Decide Who Speaks for the Process

When several leaders communicate independently, even small differences in wording can create confusion.

One person says a decision has been made.

Another says it is only a recommendation.

A staff member gives a tentative date.

A team member describes the date as confirmed.

A denominational representative explains the process differently from the congregation's announcement.

No one intends to mislead.

The congregation receives several versions of reality.

A transition needs an understood communication relationship.

This does not mean one person must write or deliver every message. It means people should know:

- who coordinates official communication;
- who approves significant announcements;
- who answers procedural questions;
- who speaks about denominational requirements;
- who communicates with staff;
- who responds to media or community inquiries if needed; and
- where questions should be directed.

Other leaders should be free to discuss the process without presenting personal impressions as official decisions.

A useful sentence may be:

My understanding is that this remains under consideration. Please look to _____ for the congregation's official information.

That response is not evasive.

It protects the congregation from accidental misinformation.

Communication Must Move in Both Directions

Communication is not complete when leaders send information.

Members need ways to ask questions, identify confusion, and say what additional information would help.

Without this return path, leaders may continue explaining what they believe people need while missing the questions people are actually asking.

Two-way communication does not mean that every question receives an immediate or public answer.

Some questions concern confidential matters.

Some assume decisions that have not been made.

Some belong to a later movement.

Some require denominational or legal guidance.

Some may be expressions of anxiety more than requests for information.

Every question can still be acknowledged.

Leaders can say:

We cannot discuss the confidential details of that matter, but we can explain the process by which it is being handled.

Or:

That question will become appropriate after the congregation completes its listening work.

Or:

We hear that many people are uncertain about this. We will address it in the next update.

Questions help leaders evaluate whether communication is working.

If the same question repeatedly appears, the congregation may not need another identical answer. It may need a clearer explanation, another communication channel, or greater confidence that the answer is truthful.

Rumor Often Begins with a Real Need

Rumors are easy to condemn.

They are harder to understand.

Sometimes rumor is simple carelessness. Someone repeats information without checking it.

Sometimes it is used intentionally to influence opinion or undermine trust.

Often it grows from a genuine need.

People are anxious.

They want to know what is happening.

They do not know where to ask.

They have received incomplete information.

They are trying to make sense of a process that feels distant.

Understanding the need does not make the rumor harmless.

It helps leaders respond more wisely.

A harsh public correction may stop one statement while increasing suspicion.

Silence may allow misinformation to spread.

A calm response can name what is inaccurate, provide what is known, and direct people toward a reliable source.

We have heard questions about whether a search committee has already begun reviewing candidates. That has not happened. The congregation is still preparing for its remembering and listening work. A search committee will be formed according to our governing process, and the congregation will be informed when that occurs.

The correction should be proportionate.

Not every inaccurate comment requires a congregational announcement.

But misinformation affecting trust, participation, staff, finances, leadership, or the integrity of the process should not be allowed to become the accepted story.

Confidentiality Is Not the Same as Secrecy

Some information cannot be shared publicly.

Personnel matters may be confidential.

Pastoral-care information must be protected.

Prospective candidates will eventually require privacy.

Allegations or disciplinary matters may be governed by formal processes.

Leaders should not disclose protected information in an attempt to prove that they are transparent.

At the same time, “confidentiality” should not become a general explanation for withholding everything difficult.

Even when details cannot be shared, leaders can often communicate:

- what kind of matter is being addressed;
- who has authority to address it;
- what process is being followed;
- whether professional or denominational guidance is involved;
- what can and cannot be disclosed; and
- when further communication may be possible.

For example:

A personnel concern has been brought to the body responsible for staff oversight. Because employment matters are confidential, we cannot discuss individual details. We can assure you that the concern is being addressed through the congregation’s established process.

This communicates a boundary without pretending nothing is happening.

Secrecy protects the process from accountability.

Confidentiality protects people and appropriate decision-making.

Leaders should know which one they are practicing.

Staff Should Not Be the Congregation's Informal News Service

Members often turn to staff when they want information.

Staff members are visible.

They are present during the week.

They may know when meetings occur and who attended.

People assume they know more than has been publicly communicated.

This can place staff in an unfair position.

A staff member may know confidential information that cannot be shared.

The staff member may know no more than the congregation does.

They may be uncertain whether a conversation was official.

They may fear appearing unhelpful.

They may become the recipient of frustration about decisions they did not make.

Staff should receive official information before or at the same time as the congregation when the information affects their work. They should also know how to respond to questions.

A simple shared response may be:

The current update is available through _____. I do not have additional information to provide, but I can help direct your question to _____.

This protects staff from becoming unofficial interpreters of the transition.

It also protects the congregation from receiving different accounts depending on which staff member was asked.

Difficult News Should Be Communicated Directly

Not every transition development will be welcome.

A hoped-for timeline may change.

A facilitator may recommend additional work.

A team may discover that participation was too narrow and needs to be expanded.

A proposed structure may not receive denominational approval.

A candidate may withdraw later in the process.

Financial realities may affect the position the congregation can responsibly offer.

When news is disappointing, leaders may be tempted to delay communication while searching for a more reassuring version.

Delay often makes the news harder to receive.

People must then respond both to the disappointment and to the belief that information was withheld.

Difficult news should be communicated:

- as directly as possible;
- by people with appropriate authority;
- first to those most immediately affected;
- with enough context to understand what happened;
- without blame or speculation;
- with clear information about what happens next; and
- with an opportunity for questions where appropriate.

Hope does not require pretending that every development is good.

Christian hope rests in God's faithfulness, not in the uninterrupted success of a transition plan.

Leaders can tell the truth about disappointment without declaring the journey a failure.

Communication Is Pastoral Work

Transition communication can appear administrative.

It includes dates, meetings, decisions, procedures, reports, and announcements.

Beneath those details are relationships.

Beneath the request for information are deeper questions: Can our leaders be trusted? Is the work moving? Is there a place for us? Does anyone recognize our uncertainty? Will the congregation tell the truth when something becomes difficult?

A reliable update will not answer every deeper question.

It can demonstrate that leaders understand their responsibility.

Regular communication says, “We have not forgotten that this work belongs to the congregation.” Clear communication says, “We will tell you what we know without pretending to know more.” Two-way communication says, “Your questions matter.” Honest communication says, “We trust this congregation enough to speak truthfully about uncertainty.”

Communication will not remove the unknowns.

It can help the congregation live within them without being governed by rumor, suspicion, or false promises.

The congregation does not need an answer to every question.

It needs confidence that its leaders will speak when they have something to say, acknowledge when they do not know, and remain present in the silence between one answer and the next.

Field Manual Resource: FM 6.1 — Transition Update Framework and Samples

For Conversation

1. What does our congregation need to know regularly in order to remain informed and connected without being overwhelmed by updates?
2. How will we distinguish what is known, what has been decided, what remains open, and when another update will come?
3. Who will coordinate official communication, and how will members be able to ask questions or identify confusion?
4. Where might confidentiality be necessary, and how can we explain those limits without allowing confidentiality to become secrecy?

Chapter Seven

Choosing a Faithful Pace

“How long will this take?”

The question appears early in almost every pastoral transition.

Members want to know when the search will begin.

Staff members want to know how long temporary arrangements may continue.

Leaders want a plan.

The desire for a timeline is understandable. Uncertainty becomes easier to carry when people can imagine its end.

But a transition cannot be made faithful simply by making it fast.

Neither does faithfulness require making it unnecessarily long.

The task is to choose a pace that allows meaningful participation and discernment without letting preparation become delay.

Urgency Is Not Always Direction

A pastor’s absence creates pressures that feel immediate.

Temporary leadership may be expensive or difficult to sustain.

Staff members may be carrying additional responsibilities.

Worship leadership may change from week to week.

Attendance or giving may be uncertain.

Members may worry that the congregation will lose momentum.

Leaders may fear that prospective pastors will not be available if the congregation waits too long.

These concerns deserve attention.

They should not automatically determine the pace.

Urgency narrows vision. It asks:

How quickly can we solve this?

Discernment asks:

What needs to become clear before we move forward?

The two questions are not enemies. A congregation can act responsibly without moving anxiously. It can establish deadlines without pretending that every part of the journey can be scheduled. It can recognize practical pressures while refusing to let those pressures define its future.

The congregation should move with purpose.

Purpose is not the same as haste.

Delay Can Also Become Avoidance

Some congregations need permission to slow down.

Others need encouragement to begin.

Preparation can become a way of postponing difficult work. Leaders hold another organizational meeting. A team revises the plan again. The congregation waits for the ideal facilitator, the ideal season, or the moment when everyone feels ready.

That moment may never come.

Delay sometimes protects the congregation from questions it does not want to ask.

It may also reflect exhaustion, uncertainty about authority, unresolved conflict, or a fear that deeper participation will make the process harder to control.

A faithful pace is not simply slower than the congregation's first impulse.

It is deliberate movement.

Leaders should be able to say what work is happening now, what will follow, and what must be learned before the congregation moves to the next stage.

If no one can explain why the congregation is waiting, patience may have become drift.

Capacity Matters

Transition work requires time, attention, and emotional energy.

Those resources are not unlimited.

Governing body members may already carry demanding responsibilities.

Staff members may be doing additional work because of the pastoral vacancy.

The same volunteers may be asked to serve on every team.

Members have jobs, families, health concerns, and obligations beyond the congregation.

A process can be thoughtfully designed and still ask more than people can sustain.

Leaders should consider not only what the congregation wants to accomplish, but also what it can carry faithfully.

Some ordinary work may need to be simplified.

A less essential initiative may need to wait.

Meetings may need to be coordinated so the same people are not repeatedly asked to choose among competing responsibilities.

Transition tasks should not be quietly added to staff workloads without deciding what other work will change.

Rest is not an interruption of preparation.

Sometimes it is what allows preparation to continue.

Use Milestones Rather Than Promises

A congregation cannot reliably predict when a new pastor will arrive.

It can identify the work that must occur along the way.

Milestones—such as establishing leadership, completing remembering and listening, preparing the Ministry Discernment Profile, and authorizing the search—provide direction without creating a false promise about the final date.

They also help the congregation recognize progress.

Some of the most important transition work produces no dramatic announcement. A congregation may have listened more broadly than before, recognized a truth about itself, or learned to hold disagreement more faithfully.

Those changes may not shorten the search.

They may strengthen everything that follows.

Allow the Pace to Change

The congregation's first plan will not anticipate everything.

A conversation may reveal that more voices need to be heard.

A conflict may require attention.

A staff change may reduce leadership capacity.

A denominational requirement may take longer than expected.

A season of unusually demanding ministry may require a pause.

At other times, the congregation may discover that it is ready to move sooner than anticipated.

Changing the pace is not necessarily a failure of planning.

The question is why the pace is changing.

Are leaders responding to what the congregation is learning?

Are they protecting a process that needs more time?

Are they avoiding a difficult question?

Are they reacting to anxiety?

Are they maintaining an activity simply because it appeared on the original calendar?

A wise plan provides structure without becoming a master.

The Congregation's Ministry Continues

Transition work is important.

It is not the congregation's entire ministry.

The church continues to worship, teach, serve, welcome, pray, and care for people. It continues to participate in the life of its community. It continues to respond to needs that cannot wait for the arrival of another pastor.

A transition process can become so consuming that every meeting, announcement, prayer, and conversation turns toward the pastoral search.

That can exhaust the congregation and distort its sense of identity.

The congregation is not a church waiting to become a church again.

It is already participating in Christ's ministry.

A faithful pace leaves room for that life to continue.

The work of transition should support the congregation's ministry, not eclipse it.

Patience Is Active

Patience is sometimes mistaken for doing nothing.

Christian patience is more demanding.

It continues to pray when answers are incomplete.

It listens before reaching a conclusion.

It allows understanding to mature.

It resists the promise of an easy solution.

It remains attentive when progress is difficult to measure.

It takes the next faithful step without insisting upon seeing the whole road.

A congregation practicing patience is not passive.

It is preparing, participating, learning, and discerning without forcing the future to arrive before its time.

Neither Hurried nor Stalled

There is no universally faithful length for a pastoral transition.

A process may be brief and thoughtful.

It may be long and avoidant.

It may also be long because the congregation is doing necessary work or because circumstances beyond its control require patience.

The calendar alone cannot tell the whole truth.

A better question is:

Are we giving the present work the time it needs while continuing to move toward the work that follows?

If the answer is yes, the congregation does not need to measure itself against another church's timeline.

It can proceed at a pace shaped by purpose, capacity, and attention.

Neither hurried nor stalled, the congregation stands ready to take the next faithful step when that step becomes clear.

Field Manual Resource: FM 7.1 — Transition Milestones and Capacity Planner

For Conversation

1. Where is our congregation experiencing pressure to move quickly, and what legitimate concerns are beneath that pressure?
2. Where might patience be necessary, and where could waiting become avoidance?
3. What leadership, staff, and congregational capacity is realistically available for the work ahead?
4. What milestones would help us recognize progress without making promises about a completion date we cannot control?

Chapter Eight

Preparing Spiritually to Walk Together

A congregation can prepare every practical detail and still remain unprepared for discernment.

Leadership can be organized.

A facilitator can be engaged.

Participation can be planned.

Communication can be clear.

A reasonable pace can be established.

All of this matters.

Yet discernment asks for something more than a well-managed process.

It asks people to become available to God.

That availability cannot be scheduled or guaranteed. It cannot be produced by adding a prayer to the beginning of a meeting. It grows as the congregation learns to listen with humility, speak with honesty, release the need to control the outcome, and trust that the Holy Spirit may be present in voices and possibilities no one expected.

The congregation is not preparing merely to complete a transition.

It is preparing to walk together in the presence of God.

Prayer Is Not Another Task

Prayer can become one more item on an agenda.

Someone offers an opening prayer.

The meeting begins.

Someone offers a closing prayer.

The meeting ends.

Prayer has marked the boundaries of the gathering without necessarily shaping what happened inside them.

There is nothing wrong with opening and closing prayer. Familiar practices can remind people that congregational work belongs within the life of faith.

But prayer during transition must become more than a ceremonial beginning and ending.

Prayer asks the congregation to place its work before God.

It reminds leaders that the future is not theirs to manufacture.

It creates room for silence.

It allows anxiety to be named without allowing anxiety to become the congregation's guide.

It asks people to listen for more than confirmation of what they already believe.

It invites the congregation to become willing to change.

This kind of prayer does not make decisions easier.

Sometimes it makes them harder because people begin noticing questions they would rather avoid.

Prayer does not guarantee agreement.

It may deepen the congregation's awareness of differences that deserve attention.

Prayer does not reveal the name of the next pastor.

It prepares the congregation to recognize faithfulness when the time for mutual discernment arrives.

The purpose of prayer is not to persuade God to approve the congregation's plans.

It is to make the congregation more open to God's purposes.

Worship Holds the Transition within a Larger Story

A pastoral transition can begin to dominate congregational life.

Meetings multiply.

Announcements focus on the process.

Questions about future leadership appear in every conversation.

Members begin measuring the congregation's health by how quickly the search seems to be moving.

Worship restores perspective.

The congregation gathers not because its transition is the most important thing happening, but because God is worthy of praise.

Scripture is proclaimed.

The sacraments are celebrated.

Prayers are offered for the church and the world.

People bring grief, gratitude, uncertainty, and hope into the presence of God.

The congregation remembers that it belongs to a story larger than the departure of one pastor or the arrival of another.

Worship does not ignore the transition.

It places the transition where it belongs.

The congregation may pray for leaders and facilitators.

It may ask for wisdom before important gatherings.

It may acknowledge uncertainty.

It may give thanks when a movement is completed.

It may lament when the journey becomes difficult.

It may bless people entrusted with particular responsibilities.

These practices remind the congregation that transition work is not separate from its worshiping life.

The same God encountered in Scripture, prayer, proclamation, sacrament, song, and silence accompanies the congregation into its meetings and conversations.

Scripture Gives Language for the Journey

Congregations do not need to search Scripture for a story that exactly reproduces a modern pastoral transition.

There is none.

Scripture offers something more enduring.

It tells of people called to travel without knowing the entire way, of communities learning to trust God in unfamiliar places, and of leadership changing. It speaks of waiting, conflict, memory, courage, failure, forgiveness, and hope; of people called to listen again; of the Spirit distributing gifts throughout the community; and of a church whose life depends upon Christ rather than the permanence of any one leader.

Scripture can help the congregation resist the belief that uncertainty is evidence of God's absence.

It can also challenge the congregation when familiar language is used to avoid change.

The purpose is not to find a verse that settles every decision.

It is to allow the congregation's imagination to be formed by the larger witness of faith.

Scripture teaches the community how to wait without becoming passive, how to remember without becoming captive to the past, and how to hope without pretending to know what God will do next.

Discernment Begins with Humility

A congregation enters transition knowing many things about itself.

Its members know which ministries they value.

They know what kind of worship feels familiar.

They know the strengths they celebrate and the problems they hope another pastor will address.

They may already have strong ideas about the leadership they need.

Some of those judgments will prove wise.

Others may change.

Spiritual preparation begins with the humility to say:

We do not yet know everything we need to know.

The congregation has not yet listened broadly to its own people.

It has not yet examined its community with fresh attention.

It has not yet considered how its story has shaped both its gifts and limitations.

It has not yet heard the hopes, questions, and experiences that may emerge through the work ahead.

Humility does not require the congregation to distrust everything it knows.

It asks the congregation to hold its knowledge openly.

This is what we believe now, what we have experienced, and what we think may be true. We remain willing to listen for what we have not yet understood.

A congregation that already possesses every answer cannot discern.

It can only confirm.

Curiosity Is a Spiritual Practice

Curiosity may seem like an ordinary human quality rather than a spiritual discipline.

During transition, it becomes an expression of humility and trust.

Curiosity asks:

What might we learn?

What have we not noticed?

Why do people experience the same congregation differently?

What gifts have become so familiar that we no longer recognize them?

What assumptions are shaping our expectations?

What is happening in the community around us?

Where might the Holy Spirit be creating possibilities we did not plan?

Curiosity does not mean that every idea should be adopted.

It does not require the congregation to abandon conviction.

It means that the community does not rush to defend itself against every unfamiliar observation.

Fear narrows our attention.

Curiosity widens it.

Fear asks how the congregation can protect what it already knows.

Curiosity asks what God may be inviting it to discover.

The transition will bring many moments when certainty feels more comfortable than openness.

Practicing curiosity helps the congregation remain teachable.

Spiritual Language Must Not Close the Conversation

Faithful transition work will be filled with spiritual language.

People will speak of prayer, calling, discernment, faithfulness, and the leading of the Holy Spirit.

These words matter.

They can also be misused.

A personal preference can be given divine authority:

“God has told me exactly what kind of pastor we need.”

A difficult question can be dismissed:

“We simply need to have faith.”

A concern about the process can be treated as spiritual failure:

“If people trusted God, they would not be anxious.”

Pressure for agreement can be disguised as prayerfulness:

“We have prayed, so it is time for everyone to support the decision.”

A decision may be described as God’s will when it is more honestly the best judgment faithful people were able to make.

Spiritual language should open the congregation more fully to God and one another.

It should not end conversation before discernment has occurred.

People may sincerely believe they are being led in different directions.

Prayerful leaders do not need to decide immediately whose spiritual experience is valid. They can invite the community to continue testing what it hears.

Does this direction reflect the character of Christ?

Is it consistent with Scripture and the congregation’s theological commitments?

What fruit might it bear?

Whose gifts does it recognize?

Whose experience does it ignore?

Does it arise from love, fear, ambition, fatigue, or some mixture of them?

How is it being confirmed through the wider community?

Discernment is communal partly because no one person owns the voice of God.

The Congregation Needs Practices, Not Performances

Spiritual preparation does not require an elaborate program.

A congregation does not need to make every meeting feel like a retreat.

It needs practices simple enough to become part of its actual life.

Leaders might allow silence after a significant question rather than filling the space immediately.

A governing body might spend time with Scripture before discussing a major transition decision.

Congregational gatherings might include prayers that name uncertainty honestly.

Teams might pause periodically to ask not only what they have completed, but what they are learning.

Members might be invited to pray for openness rather than for a particular outcome.

Worship might recognize important moments in the process without turning every Sunday into a transition update.

Leaders might regularly ask:

Where have we experienced grace?

Where are we becoming anxious?

What voices have we not yet heard?

What are we trying to control?

What may God be asking us to receive?

The value of these practices does not depend on originality.

Their power comes through repetition.

They help the congregation develop habits of attention that can sustain it when the work becomes difficult.

Covenant Is a Way of Remembering Who We Want to Be

The congregation cannot promise that transition will be easy.

It cannot promise that everyone will agree.

It cannot promise that no one will become impatient, defensive, disappointed, or tired.

It can make commitments about how it intends to walk.

A simple covenant may commit the congregation to pray, speak truthfully, listen before responding, resist rumor, respect appropriate authority and confidentiality, seek help when needed, and remain open to being changed. It is not a set of guarantees.

It is a way of remembering who the congregation desires to be.

When anxiety rises, the covenant calls people back.

When communication fails, it reminds leaders of their commitments.

When disagreement becomes personal, it restores a shared standard.

When people grow tired, it names the purpose for which they are continuing.

The covenant does not protect the congregation from difficulty.

It helps the congregation meet difficulty without forgetting itself.

Readiness Is Not Perfection

How will the congregation know when it is ready to move forward?

Not every question will have been answered.

Not every member will have participated.

Not every leader will feel confident.

Some practical arrangements may still need adjustment.

Some anxiety will remain.

Readiness is not perfection.

A congregation may be ready when:

- responsibility for the transition is sufficiently clear;
- appropriate guidance is available;
- leaders understand how the congregation will participate;
- people know how information will be communicated;
- expectations for honest conversation have been established;
- the planned pace reflects the congregation's actual capacity;
- serious concerns requiring specialized attention have been identified;
- the congregation understands that the search does not begin with candidates; and
- people are willing to enter the next movement without deciding in advance what they must discover.

This kind of readiness is modest.

It does not announce that the congregation has mastered transition.

It says:

We know enough to begin. We trust one another enough to try. We are willing to listen, to learn, and to be led.

The Next Movement

Preparation has done its work when the congregation is ready to turn toward its story.

The congregation will soon receive the stories, relationships, ministries, conflicts, losses, and moments of grace that have shaped its life. It cannot yet know what its remembering will reveal.

It does not need to know.

Now it stands ready to receive its own story.

Before asking where God may be leading, the congregation will remember how God has already led.

That is the next faithful step.

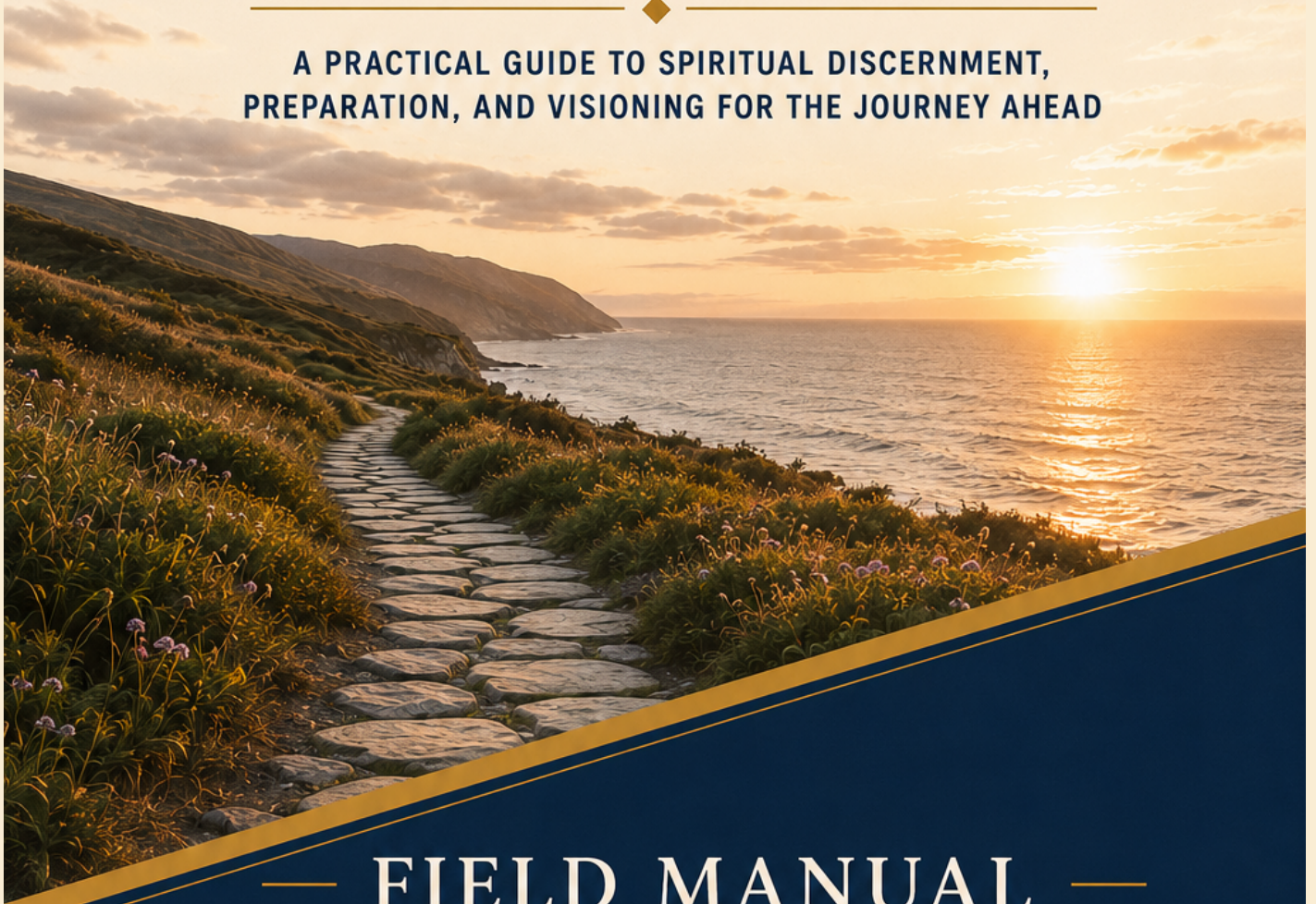
For Conversation

1. What practices of prayer, worship, Scripture, and silence could genuinely shape our transition rather than merely frame its meetings?
2. Where might our congregation need humility to say, “We do not yet know everything we need to know”?
3. What shared commitments will help us return to faithfulness when the transition becomes difficult?
4. What would demonstrate that we are ready to enter the work of remembering without deciding beforehand what our story must mean?



PREPARING FIELD MANUAL

A PRACTICAL GUIDE TO SPIRITUAL DISCERNMENT,
PREPARATION, AND VISIONING FOR THE JOURNEY AHEAD



— FIELD MANUAL —

THE COMPREHENSIVE RESOURCE FOR
EVERY STEP OF THE LEADERSHIP JOURNEY



CLOSE WITH GRACE

Guide good endings that
honor the past and
bless the future.



CARE FOR PEOPLE

Walk together through
grief, change, and
new beginnings.



LAUNCH WITH HOPE

Release the ministry
into God's future with
vision and courage.

NAVIGATING PASTORAL TRANSITIONS

PREPARING

FIELD MANUAL

Preparing a congregation for faithful participation, discernment, and the work ahead

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FM 3.1

Transition Guidance and Facilitator Discernment Worksheet

Purpose of This Resource

A congregation does not need to navigate pastoral transition without help.

Use this worksheet to name the guidance the congregation needs, discern whether facilitation should be internal, external, or shared, and clarify a facilitator's authority, limits, and working relationship.

This worksheet does not reassign the congregation's overall transition responsibilities. Those responsibilities should already be clear through Ending Well FM 5.1 — Ending Well Roles and Responsibilities Worksheet.

Part One: Confirm That Authority Is Clear

Before engaging a facilitator or other guide, confirm:

- ☐ The governing body responsible for the transition is identified.
- ☐ The denominational or judicatory body's authority is understood.
- ☐ Immediate staff supervision is clear.
- ☐ A person or team has authority to coordinate the transition.
- ☐ Leaders understand which decisions belong later to a Pastor Nominating Committee or other search body.

If these matters remain unclear, return to **Ending Well FM 5.1** before proceeding.

Governing body: _____

Transition coordinator or team:

Denominational or judicatory contact:

Person authorized to engage guidance:

Part Two: Identify the Help We Need

What Is the Congregation Preparing to Do?

- ☐ Organize the transition process
- ☐ Prepare for broad congregational participation
- ☐ Conduct congregational gatherings
- ☐ Facilitate remembering conversations
- ☐ Work through differing congregational perspectives
- ☐ Other: _____

At this point, name only the guidance that later Remembering or Listening work will require. The substantive work itself belongs to those later movements.

What Would Be Difficult to Do Without Help?

What Strengths Already Exist within the Congregation?

Consider leadership, facilitation, trust, organization, communication, group process, theological reflection, and conflict navigation.

What Experience or Perspective Is Missing?

What Do We Hope Guidance Will Make Possible?

Complete this sentence:

We need help so that our congregation can

Part Three: Determine the Kind of Help Needed

Match the need to the appropriate form of help.

Denominational or Judicatory Guidance

May be appropriate when the congregation needs:

5. interpretation of polity or required procedures;
6. approval or authorization;
7. support addressing a difficult departure; or
8. accountability within the wider church.

Is this guidance needed? ☐ Yes ☐ No ☐ Uncertain

Person or body to contact:

Questions requiring guidance:

Temporary or Transitional Pastoral Leadership

May be appropriate when the congregation needs:

5. worship and preaching leadership;
6. pastoral care;
7. staff support or supervision;
8. moderation or congregational leadership;
9. pastoral support while other people facilitate the process.

A temporary or transitional pastor may also be a skilled facilitator, but the pastoral role does not automatically include facilitation.

Is this leadership already in place? ☐ Yes ☐ No

Does the pastoral leader's role include transition facilitation?

☐ Yes ☐ No ☐ Uncertain

Clarification needed:

Facilitation

May be appropriate when the congregation needs someone to:

- design and guide gatherings;
- frame useful questions;
- create multiple ways to participate;
- notice missing voices;
- identify emerging themes; or
- return the work to the congregation for discernment.

Is facilitation needed? ☐ Yes ☐ No ☐ Uncertain

Gatherings or work requiring facilitation:

Consulting

May be appropriate when the congregation needs specialized knowledge, analysis, or recommendations concerning a defined issue.

Issue requiring consultation:

Is a consultant needed? ☐ Yes ☐ No ☐ Uncertain

Mediation

May be appropriate when identifiable people or groups are in conflict and need a structured process in which to address it.

Is unresolved conflict interfering with the transition?

☐ Yes ☐ No ☐ Uncertain

Has qualified mediation been considered? ☐ Yes ☐ No

Specialized Professional Assistance

May be necessary when concerns involve:

- abuse or misconduct;
- threats or harassment;
- safeguarding;
- trauma;
- serious personnel matters;
- legal questions;
- financial wrongdoing;
- professional discipline;
- investigation; or
- therapeutic care.

Are any of these concerns present? ☐ Yes ☐ No ☐ Uncertain

What qualified assistance is needed?

Who has responsibility for obtaining it?

Ordinary facilitation cannot replace investigation, mediation, therapy, safeguarding, legal counsel, or denominational accountability.

Part Four: Consider Internal, External, or Shared Facilitation

Internal Facilitation

An internal facilitator may offer:

- established relationships;
- lower cost.

Possible concerns include:

- existing loyalties or conflicts;
- difficulty participating while facilitating;
- assumptions about the facilitator's position;
- overlapping leadership roles;
- employment or supervisory relationships; and
- reluctance among members to speak freely.

Potential internal facilitator:

Strengths:

Possible limitations:

External Facilitation

An external facilitator may offer:

5. greater relational distance;
6. fewer established loyalties;
7. specialized facilitation skills.

Possible concerns include:

- limited knowledge of the congregation;
- time needed to build trust;
- cost;
- misunderstanding local culture; and
- limited availability.

Potential external facilitator or source:

Strengths:

Possible limitations:

Shared Facilitation

A shared model may combine:

- an external facilitator for significant congregational conversations;
- an internal team for planning, communication, participation, and follow-up; and
- denominational guidance for polity and accountability.

Would a shared model fit this congregation?

☐ Yes ☐ No ☐ Possibly

How would responsibilities be divided?

Preliminary Decision

☐ Internal facilitation

☐ External facilitation

☐ Shared facilitation

☐ No facilitator at this time

☐ More information is needed

Reason for this decision:

Part Five: Identify the Qualities Needed

Select the qualities that will matter most in this congregation.

- ☐ Listens before prescribing
- ☐ Explains processes in ordinary language
- ☐ Creates room for varied participation
- ☐ Understands denominational polity
- ☐ Recognizes differences in power
- ☐ Remains calm during disagreement
- ☐ Avoids taking sides
- ☐ Handles private information appropriately
- ☐ Distinguishes discomfort from harm
- ☐ Recognizes when specialized help is needed
- ☐ Adapts methods to congregational size and capacity
- ☐ Keeps the spiritual purpose of transition visible
- ☐ Other: _____

Three Qualities That Matter Most

5. _____
6. _____
7. _____

Experience That Is Essential

Experience That Would Be Helpful but Is Not Essential

Part Six: Questions for a Potential Facilitator

Choose only the questions needed for a focused conversation.

- How do you understand the role of a facilitator during pastoral transition?
- How do you help people with different experiences participate meaningfully?
- How do you respond when disagreement emerges?
- How do you distinguish ordinary discomfort from conflict requiring another kind of intervention?
- How do you report themes without exposing personal information?
- How do you work with the governing body, staff, denominational leaders, and transition team?
- What would cause you to recommend mediation, investigation, therapeutic support, or another specialized resource?
- What fees, expenses, scheduling limits, or other practical considerations apply?

Notes

Part Seven: Clarify the Facilitator's Role

The Facilitator Will

- ☐ Help clarify the purpose of gatherings
- ☐ Design or recommend a process
- ☐ Guide congregational conversations
- ☐ Create multiple forms of participation
- ☐ Summarize emerging themes
- ☐ Report to the governing body or transition team
- ☐ Other: _____

The Facilitator Will Not

- ☐ Govern the congregation
- ☐ Make decisions belonging to the governing body

☐ Perform the work of the future search committee

☐ Investigate allegations

☐ Provide therapy

☐ Promise agreement or a particular outcome

☐ Other: _____

Part Eight: Establish the Working Relationship

Facilitator: _____

Primary congregational contact: _____

Person or body to whom the facilitator is accountable:

Work included:

Work not included:

Expected starting date: _____

Expected period of service: _____

How meetings will be scheduled:

How decisions about the process will be made:

How concerns about facilitation will be raised:

What information the facilitator may receive:

What information may be reported to leaders:

How themes will be reported to the congregation:

Fees and expenses:

Review date: _____

A written agreement may be wise, especially when the congregation engages an external facilitator, consultant, or professional service. Follow all congregational and denominational requirements.

Part Nine: Final Discernment

What Kind of Help Have We Decided to Receive?

Why Is This the Right Form of Help for This Congregation Now?

What Work Will Remain with Congregational Leaders?

What Must Be Resolved Before Guidance Begins?

Decision

☐ Engage the identified facilitator or guide.

☐ Seek additional candidates.

- ☐ Consult the denominational or judicatory body.
- ☐ Obtain specialized professional assistance first.
- ☐ Use internal facilitation.
- ☐ Proceed without a facilitator at this time.
- ☐ Reconsider after: _____

Decision made by: _____

Date: _____

Next action: _____

Person responsible: _____

Due date: _____

Receiving help does not surrender the congregation's responsibility. It brings perspective and skill to work the congregation must still carry faithfully.

FM 4.1

Congregational Participation Planner

Purpose of This Resource

Pastoral transition belongs to the whole congregation, although participation and decision-making take different forms.

Use this planner to clarify:

- what participation will mean;
- what barriers need attention;
- how leaders will report what they heard.

This planner prepares the way for Remembering and Listening. It does not supply the questions or conduct the conversations that belong to those Field Guides.

Part One: Define the Purpose

Movement Being Prepared

- ☐ Remembering
- ☐ Congregational listening
- ☐ Community listening
- ☐ Reflection on emerging themes
- ☐ Ministry Discernment Profile development
- ☐ Other: _____

Purpose of Participation

Complete this sentence:

We are inviting people to participate so that

What Are People Being Asked to Contribute?

- ☐ Personal experiences
- ☐ Congregational stories

- ☐ Observations
- ☐ Concerns
- ☐ Ideas
- ☐ Feedback on draft work
- ☐ A formal decision or vote
- ☐ Other: _____

What Is Not Being Asked?

For example, participants may be invited to share experiences without being asked to decide future ministry priorities.

Part Two: Clarify Authority and Expectations

Meaningful participation does not mean that the whole congregation makes every decision. It does require honesty about how participation will inform the decisions that follow.

Person or body inviting participation:

Person or team receiving what is shared:

Person or body holding final authority:

How Will Contributions Be Used?

- ☐ To broaden understanding
- ☐ To identify recurring themes
- ☐ To recognize differing experiences
- ☐ To inform a later decision
- ☐ To make a formal congregational decision

☐ Other: _____

What Will Not Happen Automatically?

Check any statement that needs to be explained.

- ☐ Not every suggestion will become a decision.
- ☐ Participation will not be treated as a vote unless a vote is formally announced.
- ☐ One person will not be expected to represent an entire group.
- ☐ Personal stories will not be interpreted as evaluations of individual staff members or pastors.
- ☐ Confidential, personnel, disciplinary, or safeguarding matters will not be addressed through ordinary congregational participation.

Explanation to Participants

Draft one or two sentences explaining the purpose and limits of participation:

Part Three: Identify Who Should Participate

Plan for the congregation as it actually exists, not only for those who regularly attend meetings.

Congregational Participants

- ☐ Governing-body members
- ☐ Current staff
- ☐ Longtime members
- ☐ Newer members
- ☐ Regular worshipers who are not members
- ☐ Children
- ☐ Parents and caregivers
- ☐ Homebound members
- ☐ People participating primarily online
- ☐ People who attend less frequently

- ☐ People who have recently stepped back from congregational life
- ☐ People using languages other than the congregation's primary language
- ☐ People with disabilities
- ☐ Other: _____

These categories need not produce separate gatherings; they help leaders notice experiences a general invitation may miss.

People Beyond the Congregation

Community listening does not begin here. Use this planner only to notice relationships that may warrant an invitation when the Listening movement begins.

- ☐ Community organizations
- ☐ Ministry partners
- ☐ Schools
- ☐ Service agencies
- ☐ People who use the congregation's building
- ☐ Former participants, when appropriate
- ☐ Other: _____

Participation Map

People or Group	Why Their Perspective Matters	Best Way to Invite Participation
-----------------	-------------------------------	----------------------------------

Part Four: Notice Who May Be Missed

Who Participates Easily?

Whose Absence Would Leave a Significant Gap?

Silence does not necessarily signal satisfaction, disagreement, or disengagement. Offer an appropriate invitation, then allow people to decide whether they wish to participate.

Part Five: Choose Forms of Participation

When a process offers only one way to participate, it will hear most clearly from those already comfortable with that form.

Possible Forms

- ☐ Whole-congregation gathering
- ☐ Small-group conversation
- ☐ Individual conversation
- ☐ Written response
- ☐ Telephone conversation
- ☐ Video gathering
- ☐ Age-appropriate activity for children
- ☐ Staff conversation
- ☐ Storytelling activity
- ☐ Other: _____

Participation Plan

Participant Group	Form of Participation	Person Responsible	Approximate Timing
-------------------	-----------------------	--------------------	--------------------

Why Were These Forms Chosen?

Part Six: Address Barriers

Scheduling

- ☐ More than one time will be available.
- ☐ Participation will not depend upon attending one meeting.
- ☐ Work schedules have been considered.
- ☐ Congregational and community calendars have been reviewed.

Physical Access

- ☐ Accessible restrooms are available.
- ☐ Seating accommodates varied mobility needs.
- ☐ Transportation needs have been considered.

Communication Access

- ☐ Large-print materials are available if needed.
- ☐ Microphones will be used.
- ☐ Remote participants can hear and contribute.
- ☐ Written materials use clear, accessible language.

Family and Caregiving Responsibilities

- ☐ Childcare is available when appropriate.
- ☐ Participation options recognize caregiving responsibilities.

Relational Barriers

- ☐ Staff members have an appropriate setting for participation.
- ☐ People are not required to speak in front of supervisors or others when that would limit honest participation.
- ☐ People may decline to answer a question.
- ☐ No one will be pressured to disclose personal information.

Other Barriers

Action Needed

Barrier	Response	Person Responsible
---------	----------	--------------------

Part Seven: Prepare the Invitation

A general announcement may not reach people who participate less regularly. Pair broad communication with particular, personal invitations.

Every Invitation Should Explain

- ☐ Why participation matters
- ☐ What people are being asked to contribute
- ☐ What will happen during the gathering or activity
- ☐ Who will receive it
- ☐ What will remain outside the scope
- ☐ How privacy will be handled
- ☐ How much time participation will require
- ☐ What accommodations are available
- ☐ When and where participation will occur
- ☐ Whom to contact with questions
- ☐ Worship announcement
- ☐ Congregational email
- ☐ Website
- ☐ Social media
- ☐ Printed letter
- ☐ Bulletin insert
- ☐ Other: _____

Particular Invitations

Person or Group	Who Will Invite Them?	How Will the Invitation Be Made?
-----------------	-----------------------	----------------------------------

Sample Invitation

As part of our pastoral transition, our congregation is preparing to

_____.

We are inviting you to participate because _____.

Participants will be asked to _____.

What we hear will be used to _____.

This gathering will not _____.

You may participate by _____.

For questions or accommodations, contact _____.

Part Eight: Prepare to Receive What Is Shared

Before inviting participation, decide how responses will be received and protected.

Recording

- ☐ No individual responses will be recorded.
- ☐ Facilitators will take general notes.
- ☐ Responses will be anonymous.
- ☐ Names will be recorded but not included in reports.
- ☐ Another method: _____

Who May See the Original Responses?

How Will Personal Information Be Protected?

How Long Will Notes or Responses Be Retained?

If someone raises a concern involving personnel, misconduct, abuse, safeguarding, legal matters, or another issue outside the scope of the gathering:

The concern will be directed to:

The person responsible for follow-up is:

Ordinary congregational participation should not be used to investigate allegations, evaluate individual employees, or disclose pastoral confidences.

Part Nine: Report Back to Participants

People should know what happened to what they shared.

What Will Be Reported?

- ☐ Number or range of participants
- ☐ Groups or parts of congregational life represented
- ☐ Broad themes
- ☐ Questions requiring further attention
- ☐ Matters referred to another process
- ☐ Decisions not yet made
- ☐ The next step
- ☐ Congregational meeting
- ☐ Worship announcement
- ☐ Written report
- ☐ Newsletter
- ☐ Website
- ☐ Other: _____

Person responsible for the report:

What Should Not Appear in the Report?

- ☐ Names without permission
- ☐ Personally identifying details
- ☐ Personnel information
- ☐ Pastoral confidences
- ☐ Details of misconduct or safeguarding concerns
- ☐ Language suggesting that a minority experience is unimportant
- ☐ Claims that everyone agrees when differences remain
- ☐ Other: _____

Part Ten: Final Participation Plan

Movement or activity:

Purpose:

People being invited:

Forms of participation:

Principal barriers and accommodations:

Who will receive what is shared:

How contributions will be used:

Who holds final authority:

How participants will hear what happened:

Person coordinating participation:

Date the plan will be reviewed:

Meaningful participation does not ask every person to do everything. It offers a genuine invitation, a clear purpose, accessible ways to contribute, and trustworthy attention to what people share.

FM 5.1

Agreements for Congregational Conversation

Use this resource to establish clear, usable agreements for gatherings in which people share experiences, differences, concerns, and hopes.

Honest congregational conversation requires more than an invitation to speak. Participants also need shared expectations for speaking, listening, disagreeing, protecting privacy, and remaining in relationship.

This resource provides adaptable conversation agreements and brief guidance for introducing and using them.

These agreements cannot guarantee comfort or consensus. They give the group a shared place to return when conversation becomes difficult.

Part One: Conversation Information

Congregation: _____

Gathering or group: _____

Date: _____

Facilitator: _____

Purpose of the conversation:

What participants are being asked to contribute:

What will not be decided in this conversation:

How what is shared will be used:

Who will receive the results:

Part Two: Core Agreements

Use or adapt the following agreements. Keep the final list brief enough to remember and use.

We Will Speak from Our Own Experience

We will use language such as:

5. “I have experienced...”
6. “I have noticed...”
7. “What matters to me is...”

We will avoid claiming to speak for everyone through statements such as:

- “People are saying...”
- “Everyone knows...”
- “No one wants...”
- “The older members will never...”

We Will Listen Before Responding

We will seek to understand what another person is saying before we explain, correct, defend, or disagree.

We may ask:

- “What made that significant for you?”
- “What do you most want us to understand?”
- “Have I understood you correctly?”

We Will Make Room for Different Experiences

One person’s experience does not erase another’s. We will resist the pressure to decide too quickly which account represents the congregation as a whole.

We Will Ask Questions Before Assuming Motives

We will not presume to know why another person spoke, acted, or responded as they did.

When something is unclear, we will ask for clarification.

We will not present rumor, assumption, or secondhand information as fact.

When we are uncertain, we will say so.

We Will Disagree with Ideas Without Attacking People

We may question an interpretation, suggestion, or conclusion.

We Will Make Room for Voices Not Yet Heard

Those who speak often will make room.

Those who need time may pause before responding.

Silence will not be treated automatically as agreement or disagreement.

We will speak about our own experiences rather than disclose someone else's private information.

Personal stories shared in the group will not be repeated outside it without permission.

The facilitator will explain what notes are being taken and how they will be used.

We Will Respect the Limits of This Conversation

This conversation is not intended to:

5. evaluate individual staff members;
6. discuss confidential personnel matters;
7. disclose pastoral confidences;
8. investigate allegations;
9. provide therapy or mediation.

When an important concern falls outside the gathering's scope, we will direct it to those responsible for addressing it.

We Will Remain Open to Learning

We do not need to agree with every statement.

We will remain curious about what another person's experience may help the congregation see.

Part Three: Short-Form Conversation Agreement

Use or adapt this brief form at the beginning of a gathering:

Our Commitments

During this conversation:

- We will speak from our own experience.
 - We will listen to understand before responding.
 - We will make room for experiences different from our own.
 - We will ask questions before assuming motives.
 - We will distinguish what we know from what we have heard.
 - We will disagree with ideas without attacking people.
 - We will make room for voices not yet heard.
 - We will protect appropriate privacy.
 - We will respect the purpose and limits of this gathering.
 - We will remain open to learning.
-

Part Four: Explain Privacy and Confidentiality

Do not promise that “everything said here stays here” unless that promise can actually be kept.

Before the conversation begins, explain:

Will participants be identified in notes?

☐ Yes ☐ No ☐ Participants may choose

Who will see the notes or responses?

How will themes be reported?

What limits to confidentiality apply?

These limits may include:

- reports of abuse or threats;
- safeguarding concerns;
- allegations of misconduct;
- serious personnel concerns; or
- information requiring denominational or professional action.

Sample Privacy Statement

We ask participants not to repeat another person’s personal story outside this gathering without permission. Facilitators will report broad themes rather than attribute comments by name unless permission has been given.

We cannot promise absolute confidentiality. Information involving abuse, threats, safeguarding, misconduct, legal obligations, or serious personnel concerns may need to be referred to the appropriate leader or professional process.

Adapt this statement to denominational requirements, applicable law, and the purpose of the gathering.

Part Five: Introduce the Conversation

Sample Opening

We have gathered to _____.

This conversation is intended to help us _____.

We are not making a decision today about _____.

What we hear will be used to _____.

Honest conversation may hold different experiences and interpretations. We need not agree with everything we hear, but we do need to speak truthfully, listen carefully, and treat one another with dignity.

To help us do that, we will use the following agreements.

Read or display the agreements.

Then ask:

Is there anything in these agreements that needs clarification before we begin?

Do not spend so much time revising the agreements that the group never reaches its actual work.

Part Six: Return to the Agreements

The facilitator should use the agreements as a shared resource rather than as a threat.

When One Person Is Taking Too Much Space

Let us return to our commitment to make room for voices not yet heard. I am going to pause here and invite others into the conversation.

When Someone Claims to Speak for Everyone

Can you restate that from your own experience? What have you personally seen, heard, or noticed?

We do not need to decide whether this experience represents everyone. Let us first make sure we understand what has been shared.

When Someone Assumes Another Person's Motive

Let us return to our agreement to ask questions before assuming motives. Is there a question you can ask instead?

Do we know that directly, or is that something we have heard? If it cannot be confirmed here, we should not treat it as established information.

When a Leader Becomes Defensive

Before we explain or respond, let us make sure we understand the concern being raised.

We may disagree with the idea, but we will not attack the person. Please restate the concern without assigning character or motive.

When Private Information Is Disclosed

Let us pause. This information does not belong in the group's discussion. We will protect the person's privacy and direct the concern to the person or process responsible for follow-up.

When the Group Moves Too Quickly Toward Agreement

We may be reaching a conclusion before we have heard enough. Whose experience or perspective has not yet entered the conversation?

When Emotion Becomes Strong

Let us pause. Strong emotion does not mean that the conversation has failed. We will observe a moment of silence, then discern what is needed before we continue.

Part Seven: Know When to Pause or Stop

Difficulty alone does not mean that a conversation must end. The facilitator should pause or stop the gathering when:

- participants are being threatened or harassed;
- demeaning or abusive language continues after redirection;
- private personnel or pastoral information is being disclosed;
- an allegation requires formal reporting or investigation;
- someone appears unable to continue safely;
- the conversation requires mediation rather than facilitation; or
- continuing would create greater harm.

We need to pause this conversation. The concern that has emerged cannot be handled responsibly in this setting. We will identify the appropriate next step and share what we responsibly can about the process that follows.

Immediate Action Needed

Concern:

Person responsible for follow-up:

When participants will receive an update:

Stopping a conversation is not the same as dismissing the concern. Leaders remain responsible for carrying that concern to the appropriate place.

Part Eight: Closing the Conversation

A gathering should end with clarity about what was heard and what happens next.

Before Closing, State

- ☐ What the group was asked to consider
- ☐ What broad themes were heard
- ☐ What differences remain
- ☐ What matters were redirected elsewhere
- ☐ Who will receive the results
- ☐ When participants can expect an update

Sample Closing

We also heard different experiences concerning _____.

These differences do not need to be resolved before the conversation can be useful.

What we heard will now be _____.

You can expect the next update by _____.

Before we leave, let us hold in prayer what has been spoken, what remains unspoken, and the wisdom our congregation still needs.

Part Nine: Facilitator Review

Complete after the gathering.

Participation

Who spoke readily?

Whose voices were less present?

Did the structure allow different forms of participation?

Which agreements served the group well?

How was the group redirected?

Privacy and Scope

Did any concern require another process?

☐ No ☐ Yes

Next Gathering

What should be adjusted?

What needs to be communicated before the next conversation?

Conversation agreements cannot remove discomfort or disagreement. They can help the congregation speak truthfully, listen carefully, and remain in relationship as understanding grows.

FM 6.1

Transition Update Framework and Samples

Purpose of This Resource

Use this resource for a reliable pattern of transition updates, adaptable samples, and honest language when answers are not yet known, including:

- ordinary progress;
- no new decision;
- a changed milestone or delay;
- correction of inaccurate information; and
- explanation of confidential limits.

This is not a second departure communication planner. Departure announcements and immediate post-departure communication belong to the Ending Well Field Manual.

Part One: Establish the Official Source

Before sending updates, clarify who is authorized to communicate for the transition process.

Congregation: _____

Governing body: _____

Transition team or coordinator:

Person responsible for drafting updates:

Person or body approving significant updates:

Person authorized to answer procedural questions:

Denominational or judicatory contact:

Where official updates will appear:

Staff members should know where to direct questions. They should not be left to offer unofficial explanations or information beyond their authority.

Part Two: Use a Consistent Update Framework

A useful transition update ordinarily answers six questions.

1. Where Are We?

Name the current movement or stage.

We are currently preparing for congregational Remembering.

2. What Has Happened?

Report completed work or a decision actually made.

The governing body has appointed the transition team, and the team has completed its initial orientation.

3. What Is Happening Now?

Describe the work currently underway.

The team is working with our facilitator to prepare opportunities for broad congregational participation.

4. What Remains Open?

Identify what has not yet been decided.

Dates for the remembering gatherings have not yet been finalized.

5. What Happens Next?

Name the next action, decision, or invitation.

The congregation will receive gathering dates and participation information in the next update.

6. When Will We Communicate Again?

Provide a date or dependable interval.

The next transition update will be provided by _____.

A transition update need not answer every question. It should tell the truth about where the congregation is now and what comes next.

Part Three: Draft an Update

Current Location

Where are we in the transition?

Completed Since the Last Update

What has happened or been decided?

Work Underway

What is happening now?

Matters Still Open

What has not been decided?

Congregational Participation

What are people being invited to do?

If no participation is currently needed, say so clearly.

Next Step

Next Update

Date or interval: _____

Questions

Direct questions to: _____

Contact information: _____

Part Four: Final Review Before Sending

Confirm:

- ☐ The update distinguishes decisions from possibilities.
- ☐ Tentative dates are identified as tentative.
- ☐ No completion date is promised unless it can be controlled.
- ☐ The next step is clear.
- ☐ The next update has a date or dependable interval.
- ☐ Staff have received information affecting their work.
- ☐ Confidential, personnel, pastoral, candidate, or safeguarding information is protected.

Before sending, make sure the message is accurate, calm, and proportionate—and that it protects information the congregation has no right to disclose.

Sample One

Ordinary Progress Update

Preparing for the Work Ahead

Preparing for the Work Ahead

Our congregation is currently in the *Preparing* movement of pastoral transition.

Since our last update, the governing body has appointed a transition team and clarified the team's relationship with the session and presbytery.

The team is now working with a facilitator to prepare opportunities for broad congregational participation. This preparation will help ensure that the later work of remembering and listening includes more than the congregation's most familiar voices.

The next step will be announcing the dates and forms of participation available to the congregation.

Questions may be directed to the transition team through the church office.

Our next transition update will be provided by October 15.

Sample Two

No New Decision Update

A period without a new decision does not require silence.

Transition Update

No new transition decision has been made since our previous update.

During this period, the transition team has been reviewing participation needs, accessibility considerations, and possible dates for congregational gatherings.

This work is preparing the congregation to enter the Remembering process with clear expectations and meaningful opportunities to participate.

The dates have not yet been finalized. Responsibility for approving them belongs to the governing body.

No action is currently required from the congregation.

We expect to provide the next update by November 1.

Sample Three

Changed Milestone or Delay

A change in timing should be explained directly without treating it as a failure.

Change in Our Transition Schedule

We previously expected to begin congregational Remembering gatherings in January.

That milestone has changed because the facilitator's availability and the congregation's winter schedule would not allow enough opportunities for meaningful participation.

The transition team has completed the participation plan and prepared the gathering structure. The remaining work is to establish dates that provide both in-person and remote options.

The revised next step is to begin the gatherings in February.

The transition has not stalled. The revised timing reflects our commitment to make participation genuinely accessible.

We will provide confirmed dates by January 10.

Sample Four

Correction of Inaccurate Information

Correct misinformation calmly and proportionately. Do not repeat unnecessary details or shame the people involved.

Clarification Concerning the Transition

We have heard questions about whether a Pastor Nominating Committee has already begun reviewing candidates.

No candidates are currently being reviewed. The congregation is still completing its preparation for Remembering and Listening.

The governing body has approved the transition leadership structure. It has not yet authorized the pastoral search.

The Pastor Nominating Committee will be elected and begin its work according to congregational and presbytery requirements at the appropriate time.

Official transition information is available through the congregation's weekly email and printed newsletter. Questions may be directed to the clerk of session.

Sample Five

Explanation of Confidential Limits

Confidentiality should protect people and responsible processes without becoming a way to avoid all communication.

Regarding Questions About a Staff Matter

We understand that members have questions concerning a recent change in staff responsibilities.

This matter is being addressed by the personnel committee and the governing body.

Because it involves confidential employment information, we cannot share details concerning an individual staff member's circumstances or private conversations.

We can confirm that temporary supervision and workload responsibilities have been assigned and that the personnel committee is reviewing the longer-term arrangement.

We will communicate additional information when a decision affecting the congregation's public ministry has been made.

Questions about the process may be directed to the chair of the governing body.

Part Five: Short Verbal Update

A worship or meeting announcement may use this brief pattern:

Our congregation is currently _____.

Since our last update, _____.

We are now _____.

The next step will be _____.

You can expect another update by _____.

Questions may be directed to _____.

A short verbal announcement should not stand alone when the information is complex, difficult, or likely to affect people who are not present.

Part Six: Responding When the Answer Is Not Yet Known

Use language such as:

That decision has not yet been made.

This question will be addressed after the congregation completes _____.

Responsibility for that decision belongs to _____.

We cannot provide a reliable completion date, but we can tell you what work is underway now.

We have heard the question and will address it in our next update.

Avoid:

- guessing;
- presenting a possibility as a plan;
- promising that the process will conclude by a date outside the congregation's control; or
- using "we are praying about it" as a substitute for available information.

Part Seven: Update Record

Use this brief record to maintain consistency.

Date	Main Information Communicated	Channels Used	Next Update Promised
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Questions requiring follow-up:

Person responsible: _____

Due date: _____

Reliable communication cannot remove uncertainty. It can help the congregation live faithfully within it, without depending on rumor, speculation, or false promises.

FM 7.1

Transition Milestones and Capacity Planner

Purpose of This Resource

Use this planner to identify the next significant milestone, assess the capacity available for it, make room for the work, and review the pace without promising a completion date the congregation cannot control.

This planner helps leaders:

- assess leadership, staff, and congregational capacity;
- distinguish faithful patience from avoidant delay;
- adjust the plan for a clear reason.

This is not a detailed project management system or a substitute for the overview in Navigating Pastoral Transitions.

Part One: Name the Present Work

Congregation: _____

Date: _____

Current transition movement:

Work currently underway:

Person or body responsible:

Next milestone:

Expected review date: _____

Why Does This Work Matter?

Complete this sentence:

Before we move forward, our congregation needs to

Part Two: Identify Pressures Affecting the Pace

Pressures toward speed

- ☐ Concern about worship leadership
- ☐ Cost of temporary or transitional leadership
- ☐ Leadership fatigue
- ☐ Member anxiety
- ☐ Financial concerns
- ☐ Denominational expectations
- ☐ Desire to return to normal
- ☐ Other: _____

What Legitimate Need Is Beneath the Pressure?

Pressures toward delay

- ☐ Leadership fatigue
- ☐ Congregational conflict
- ☐ Unclear authority
- ☐ Difficulty finding appropriate guidance
- ☐ Fear of what deeper conversation may reveal
- ☐ Avoidance of a difficult decision
- ☐ Financial limitations
- ☐ Other: _____

What Legitimate Need Is Beneath the Delay?

Not every desire for speed is unhealthy urgency, and not every delay is faithful patience. First name the need beneath the pressure; then discern whether the pace should change.

Part Three: Assess Current Capacity

Rate each area:

3 — Sufficient capacity

2 — Limited but manageable capacity

1 — Serious strain

0 — No current capacity

Area	Rating	What Leaders Need to Know
Governing-body time and attention		
Transition-team capacity		
Staff workload		
Temporary pastoral leadership		
Facilitation support		
Administrative support		
Communication capacity		
Congregational energy		
Volunteer availability		
Financial resources		
Technology and meeting support		
Accessibility support		

Areas of Greatest Strength

Areas of Greatest Strain

What Could Make the Current Plan Unsustainable?

Part Four: Make Room for the Work

Transition responsibilities should not simply be added to workloads that are already full.

Work That Must Continue

Ministry or Responsibility	Person Responsible	Support Needed
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Work That Can Be Simplified

Ministry or Responsibility	How It Will Be Simplified	Review Date
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Work That Can Pause

Ministry or Responsibility	Reason for Pausing	When It Will Be Reconsidered
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Work That May No Longer Be Needed

Staff Workload

Transition responsibilities being added to staff:

Other work being reduced or reassigned:

Person reviewing staff workload:

Review date: _____

Do not rely on staff to absorb transition responsibilities without deciding what other work will change.

Part Five: Identify Major Milestones

Milestones name significant work completed along the way. They do not promise that the entire transition will conclude by a particular date.

Use only the milestones relevant to the congregation.

Milestone	Person or Body Responsible	Evidence of Completion	Review Date
Transition leadership established			
Appropriate guidance engaged			
Congregational participation prepared			
Conversation agreements established			
Remembering completed			
Congregational and community listening completed			
Emerging identity and vocation articulated			
Ministry Discernment Profile completed and approved			
Search authorized according to polity			
Pastor Nominating Committee or search body begins its work			
Other:			

Do not assign completion dates to work whose duration cannot yet be known. A review date asks, “Where are we now?” It does not promise, “We will be finished.”

Part Six: Plan the Current Milestone

Complete this section only for the work immediately ahead.

Current milestone:

What Must Be Completed?

Who Is Responsible?

What Guidance or Approval Is Required?

How Will We Know This Milestone Is Complete?

When Will We Review Progress?

Who Will Receive the Update?

Use **FM 6.1 — Transition Update Framework and Samples** to communicate progress without promising an uncontrollable completion date.

Part Seven: Pace Discernment

Use the most relevant signs at each review.

Signs That We May Be Moving Too Quickly

- ☐ Important voices have not been invited.
- ☐ Leaders are treating anxiety as a deadline.
- ☐ The congregation is being asked to confirm a conclusion already reached.
- ☐ Required denominational guidance has not been received.
- ☐ Serious concerns are being bypassed.
- ☐ A promised date is controlling decisions.

Signs That We May Be Delaying Unnecessarily

- ☐ No one can explain why the congregation is waiting.
- ☐ The next step is known but has not been assigned.
- ☐ The congregation is waiting for everyone to feel ready.
- ☐ Meetings occur without decisions or next actions.
- ☐ No one communicates what work is underway.

Signs of a Faithful Pace

- ☐ The present work has a clear purpose.
 - ☐ Participation is appropriate to the work.
 - ☐ Required guidance is available.
 - ☐ Leaders can explain why the current pace is appropriate.
 - ☐ The congregation's worship, care, service, and witness continue.
 - ☐ The next step will begin when the present work is sufficiently complete.
-

Part Eight: Decide Whether to Adjust the Pace

What Are We Learning?

What Has Changed Since the Plan Was Made?

Decision

- ☐ Continue at the present pace.
- ☐ Slow the pace.
- ☐ Pause temporarily.
- ☐ Reduce other congregational work.
- ☐ Seek additional guidance.

☐ Move to the next milestone.

Reason for the Decision

What Will Change?

Who Is Responsible?

Next Review Date

What Will Be Communicated to the Congregation?

Part Nine: Milestone Review Record

Review Date	Milestone	Progress or Concern	Decision	Next Review
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Final Review

Before confirming the plan, ask:

5. Can staff and lay leaders sustain the responsibilities assigned to them?
6. Have we made room for transition work by simplifying or pausing something else?
7. Does the congregation understand what is happening now and what comes next?
8. Is the congregation continuing its ministry rather than allowing the transition to consume its whole identity?

A faithful pace is neither hurried nor stalled. It attends fully to the work at hand while continuing toward the work that follows.