



**Fresh Start in the Search Process:  
A Resource for Diocesan Transition Ministers**



Cover photo of St. Stephen's Episcopal Church, Mullica, N.J. by Jim Combs. Used by permission.

***Fresh Start in the Search Process*** is sponsored collaboratively by the Episcopal Church's Office for Transition Ministry, the Episcopal Church Foundation, and CREDO Institute, Inc. The sponsors offer this copyrighted material as a gift to the Episcopal Church and encourage its use throughout the Church with clergy and congregations engaged in the transition process.

Copyright © 2012 Episcopal Church Foundation

# **Table of Contents**

## **Overview**

- Introduction**
- Purpose**
- A Word about the Sessions**
  - Methods for Delivery**
  - Session Descriptions**
- Summary**
- Bibliography**
- Proposed Timeline**

## **Sessions**

- Diocesan Process for Transition**
- Understanding Transition: God and You**
- Good Exits Create Good Entrances**
- Entrance and Transition**
- Change-Readiness for Transition**
- Church Size & Transition**
- Role Clarity in Transition**
- Mutual Review of OUR Ministry During the Interim**

## **Supplemental Material**

- 1. “The Parable of the Trapeze” by Danaan Perry**
- 2. Change- Readiness Assessment**
- 3. Church Size and Its Implications**
- 4. Exit Handouts**
  - a. Exit Checklist for Clergy**
  - b. Exit Checklist for Lay Leaders**
  - c. Congregational Data Collection Sheet**
  - d. Exit Interview Questions**
  - e. Liturgy for Leave-Taking**
- 5. History-Sharing in Transition**

(Page left intentionally blank.)



## In the Search Process: A Resource for Diocesan Transition Ministers

### INTRODUCTION

Over 10 years ago, in the fall of 2000, the first **Fresh Start** training for diocesan “deployment officers” (as they were then called) was held. **Fresh Start**, a resource for clergy and congregations in transition, is a joint project of The Episcopal Church (Office for Transition Ministry), Episcopal Church Foundation, and CREDO Institute, Inc.

The program initially defined “transition period” as the first 18 to 24 months following the arrival of a new rector. However we have always known that the transition period includes what used to be referred to as the “interim time”—that time from when the rector announces he or she is leaving through the interim pastorate and engagement of a profile and search process to the new rector’s arrival. Indeed the dynamics of transition are in play the minute a priest announces she/he is leaving.

Recognizing this, a number of Diocesan Transition Ministers (DTM) have begun adapting **Fresh Start** material for their work in congregations early in the transition process. Based on their experience we have designed a new resource for using **Fresh Start** during this initial phase. The Rev. Thaddeus A. Bennett served as the principal author, with support from **Fresh Start** Coordinator for Curriculum, Sandra C. Kolb. The Rev. Victoria Duncan at the Episcopal Church Center’s Office for Transition Ministry; the **Fresh Start** Curriculum Development Team; and several DTMs provided invaluable feedback on early drafts. We are grateful for their support and suggestions.

### PURPOSE

**FRESH START in the Search Process** seeks to strengthen the relationship between the Diocesan Transition Ministers and congregational lay leaders during the vital period of transition by:

- Providing **Fresh Start** resources that are adaptable and address the transition issues inherent in any change in ministry;
- Suggesting a timeline for using these resources; and
- Suggesting various “delivery methods” for the material.

The bulk of the material is in the form of session outlines, shortened versions of standard **Fresh Start** modules that provide a structure for conversation and models useful for understanding the concepts of transition. We have also provided some additional resources, found in the “Supplemental Resources” section:

- A copy of a poem by Danaan Perry, “The Parable of the Trapeze,” whose image of transition as the time between trapezes is an enduring **Fresh Start** metaphor (there is a recorded version by musician Fran McKendree, and order information is contained in the bibliography at the end of this overview) ;

- *A Change-Readiness Assessment*, which enables leaders to self-assess their own response to change;
- A handout on Church Size and Its Implications with some questions to consider about how the size of a congregation is (or is not) reflected in its behavior;
- A series of handouts for lay leaders and departing clergy to help assure a smooth exit and shift in ordained leadership, which include:
  - Exit checklists for clergy and lay leaders;
  - A template for capturing key data about the life of the congregation;
  - Sample exit interview questions; and
  - A sample liturgy for leave-taking; and
- A process for conducting a history-sharing in the congregation.

Some of these documents have been drawn from existing **Fresh Start** material. Others, particularly those around exits, have been adapted from the work of a number of DTMs who have shared their own resources over the years and whose work is largely unattributed. We are grateful for their work and their generosity.

We know every diocese approaches transition ministry differently, and we want you to be able to make this material work for you (and for those search/transition consultants and interims who may be your partners). In developing this material we have made two assumptions about who will use it:

1. That they have had some training and/or experience as a DTM, search/transition consultant, or interim.
2. That they know how to use this material to launch a conversation about transition and facilitate the introduction of information, while drawing on the experience of those involved. The Episcopal Church has learned a lot about transition, but there is wisdom in the vestry about their transitions and life in Christ. Let the material lead everyone to a deeper understanding of transition.

Many of you have been trained as **Fresh Start** facilitators and are familiar with its purpose and methods. Others will be using **Fresh Start** resources for the first time (Welcome!). We know each of you has a unique style, and we encourage you to let the material, the process, the Holy Spirit and your facilitation skills bring the material to life with the participants.

## A WORD ABOUT THE SESSIONS

The session outlines are in PowerPoint, with a suggested Scriptural reading for reflection at the beginning of the session, talking points and suggested ways to facilitate the conversation. Each covers a separate topic, and two or more topics could easily be combined to create a longer session if desired.

**The sessions are primarily designed to be used with congregational leaders, typically a vestry or search committee.**

We believe that it is best when key leaders in the congregation have a good sense of the dynamics of transition. This enables them to support the rest of the community through the transition. If there is an interim she/he could also be part

of the session. Using the material with the search committee or presenting it in a larger congregational meeting is also appropriate. The material lends itself to a variety of settings and uses.

### **Each session is designed for a 15 to 30 minute time period.**

We are assuming that most of this material will be part of a larger meeting with the vestry. Thus we have shortened the material that **Fresh Start** provides. In some cases we combined material from more than one module into one short session or developed new material. Feel free, however, to decide what to use and then cut and paste or “hide” the slide/material.

### **Do shake up this material!**

Don't be a slave to the design of any of this material. Use the design as a starting place. Make it your own; do it in your own style. Add your own stories from your own experience. Refer to stories and people and congregations in your own diocese whom the participants know or have heard about. Look for ways in which the theories presented here have been proven in the life of your own diocese. And have fun!

## **MODELS FOR DELIVERY**

1. Use this material at various meetings with the vestry (see timeline suggestions).
2. Train search consultants, transition companions, and/or interim pastors to use the material and ask them to bring it to the congregational leadership.
3. Provide a schedule of “Transition Information Sessions” held at one or more locations every quarter or so. This allows lay leaders from across a diocese to meet together to discuss transition issues.
  - a. Each might cover one or two topics based upon where congregations are in the transition process. Invite lay leaders from all the congregations in transition to attend the session that most fits where they are in the transition. Or,
  - b. Offer an overview of all the topics at a time when most congregational leaders could come.
4. Other: Be creative and do what works for you in your diocese! But let us know what you do so we can share it with others! Ideas can be sent to [info@episcopalfreshstart.org](mailto:info@episcopalfreshstart.org).

## **SESSION DESCRIPTIONS**

### **1. Diocesan Process for Transition**

This session might be used during your first meeting with the vestry. It provides a generic approach to a diocesan transition process and the work of the interim period, emphasizing that the transition will benefit from being done in partnership between the

Bishop and his/her staff and with attention to the Holy Spirit. You will probably want to supplement this with your own material describing the specific requirements of your diocese.

## **2. Understanding Transition**

This session is the essential one for understanding transition with the congregation's leadership. As a result it is a bit longer. However, it can be shortened as necessary to meet your needs and those of the congregation. The session covers God's role in a time of transition, the concept of change vs. transition, and the phases of transition based on William Bridges' model of "endings, neutral zone, and beginnings." Danaan Perry's poem, "The Parable of the Trapeze," is a resource for this session. Depending upon the time available you can invite participants to reflect about their own experience of transition and use that to consider strategies to help the congregation and its leadership move through this transition of clergy leadership.

## **3. Good Exits Create Good Entrances**

This session might be used early on to prepare the vestry for saying good-bye to their current rector and/or later when the interim pastor is preparing to depart. In the former situation, it might be combined with a presentation on your diocesan transition process. The supplemental materials on exits (e.g., sample liturgy, checklists) would be good handouts for this session. At the end of this session, participants will understand that embracing a good exit is the first step into the transition process.

## **4. Entrance and Transition**

This session can be used either to prepare for the "entrance" of the interim pastor or later on to reflect upon the interim's entrance and learn from that to prepare for the entrance of the new rector. Lay leaders will reflect upon their own experiences (patterns) of entrances; be more understanding of the emotions that are present in such transitions; and be more intentional about either making the entrance into this interim relationship or learning from that interim entrance to plan for the entrance of the new rector.

## **5. Change-Readiness for Transition**

This session uses the *Change-Readiness Assessment* survey which will help participants have a greater understanding of their own readiness for change. Using personal examples, participants will understand and reflect on how they 1) experience change themselves, and 2) have or have not managed a change well. There will be an opportunity to reflect upon the congregation's history and ability to change.

The *Change-Readiness Assessment* survey may be administered via paper during the session (see Supplemental Materials) or you can put it up on a web-based service such as Survey Monkey ahead of time. The latter would allow people to see their own score as well as the average "score" of the group. With either method the vestry could be invited to take the survey before the meeting, giving you a chance to collect the data and prepare the conversation.



## 6. Church Size in Transition

This session introduces the vestry to the basics about church size theory and the dynamics which surround each size. The purpose is to help the vestry (and/or search committee) understand how the dynamics of church size might impact the role of the next rector and to discuss how this information:

- Informs their vision of the future of the congregation; and
- Their thoughts about the type of priest they might call as rector.

A handout on *Church Size and Its Implications* is included in the Supplemental Materials for use with this session.

## 7. Role Clarity in Transition

This session asks the vestry to reflect upon issues related to roles and expectations, looking at it from their own “leadership in transition” perspective, as well as from the perspective of the previous rector’s ministry. These insights will then be used to consider what needs to happen to make sure roles and expectations are clear for the next rector. Preventive actions to increase role clarity are also noted.

## 8. Mutual Review of OUR Ministry During the Interim Time

To be used as the interim pastor is leaving, this session provides a simplified method for conducting a mutual review of the ministry of the interim time. It can serve as a dry run for conducting a full mutual ministry review at the end of the first year of the new rector’s tenure.

## SUMMARY

We hope this new resource is of help to you as you work with congregations during times of transition. If you have ideas to share or new models to propose, please be in touch. Comments and suggestions can be sent to [info@episcopalfreshstart.org](mailto:info@episcopalfreshstart.org). And please visit the **Fresh Start** website for more information on how it can serve as a resource for you throughout the transition process. We would love to hear from you.

## BIBLIOGRAPHY for FRESH START in the SEARCH PROCESS

### Print Resources

Bridges, William; Transitions: Making Sense of Life's Changes; Reading, MA: Addison-Wesley Publishing Co., 1980 – focuses on transitions in personal life, outlining model of transition vs. change; Bridges' model of transition is the underlying theory for **Fresh Start**.

\_\_\_\_\_; Managing Transitions, 2<sup>nd</sup> Edition; Cambridge, MA: DaCapo Press, 2003 – describes model of transition vs. change, how transitions effect organizations, and what an effective leader in times of transition should do.

Geitz, Elizabeth Rankin; Calling Clergy: A Spiritual & Practical Guide Through the Search Process; New York, NY: Church Publishing Co., 2007 – written by a former diocesan transition minister, this is an excellent resource, bringing spiritual practice into the search process.

Ketchum, Bunt; So You're on the Search Committee; Herndon, VA: The Alban Institute, 2005 – an edited conversation with a long-time search consultant that provides pointers to all who serve on search or transition committees.

Magill, Samuel P.; Living Into Our Ministries: The Mutual Ministry Cycle, A Resource Guide. New York, NY: Episcopal Church Foundation, 2003 – explores the planning/reviewing cycle with expanded sections on designing and conducting reviews; obtainable as a free download from [www.episcopalfreshstart.org](http://www.episcopalfreshstart.org) (look under Resources).

Mead, Loren B.; A Change of Pastors and How It Affects Change in the Congregation; Herndon, VA: The Alban Institute, 2005 – a general introduction to pastoral transitions in congregations; includes the classic formulation of the five developmental tasks of interim ministry in chapter 4.

Nicholson, Roger S. ed.; Temporary Shepherds: A Congregational Handbook for Interim Ministry; Bethesda, MD: The Alban Institute, 1998 – expanding on Loren Mead's book on the interim time (see citation above), this series of essays provides a framework for interim ministry and tools to help during times of transition; an excellent resource; chapter 6 deals with the importance of learning a congregation's history, including some reflection and discussion questions (see pp. 65 – 74).

Oswald, Roy M.; Heath, James M.; and Heath, Ann W., eds.; Beginning New Ministry Together: The Alban Handbook for Clergy Transitions; Herndon, VA; The Alban Institute, 2003 – covers the entire transition process from saying good-bye to the current rector to welcoming the new one; includes an alternate approach to history-sharing with a new rector (see pp. 64-65).

Oswald, Roy M.; New Beginnings: A Pastorate Start Up Workbook; Herndon, VA: The Alban Institute, 1989 – personal workbook for clergy going through a transition to a new ministry; focuses on the issues of transition facing the clergy person when he/she first arrives (e.g., grief, joy, fear); read this to understand the big picture; includes an alternate approach to doing the history-sharing (see pp. 30 – 33).

Smith, Molly Dale, ed.; Transitional Ministry: A Time of Opportunity; New York, NY: Church Publishing Co., 2009 – a series of short pieces by interim ministers, who share their experience of ministry during the transition time, shedding light on the important work that gets done during this time in the life of a congregation.

White, Edward A., ed.; Saying Goodbye: A Time of Growth for Congregations and Pastors; Bethesda, MD: The Alban Institute, 1990 – an excellent resource focusing on the issues of leaving for both the clergy person and the congregation from “when should I leave” through “how do we handle our future relationships.”

Wind, James P.; “Constructing Your Congregation’s Story.” Online. 2007; [www.congregationalresources.org/constructing-your-congregations-story](http://www.congregationalresources.org/constructing-your-congregations-story) -- a 47-page document on congregational history-sharing; the web version has a search capability or it can be downloaded as a PDF and printed.

### **Other Resources**

McKendree, Fran.; The Fear of Transformation, audio CD. A poem on transition by Danaan Perry set to music by Fran McKendree; purchase the CD through his website ([www.franmckendree.com](http://www.franmckendree.com)).

Oswald, Roy M.; Ending Well, Starting Strong: Your Personal Pastorate Startup Workshop; Herndon, VA: The Alban Institute, 1995 – a series of six audio CD’s with workbook to guide a clergy person through self-reflection on the issues of leaving one call to ministry and entering another one.

William Bridges uses the story of Moses to illustrate leadership in times of transition. The story can be downloaded free from Bridges’ website ([www.wmbridges.com](http://www.wmbridges.com) – click on “Articles” then “Getting Them Through the Wilderness”).

The Episcopal Church’s Office for Transition Ministry has a variety of pamphlets on the search and call process in its *Parish Calling Kit*; individual documents can be downloaded as PDF files from their website ([www.episcopalchurch.org](http://www.episcopalchurch.org) – look under “Ministries” and click on “Transition Ministry,” then on “Archive: Transition Ministry” and finally on “For Congregations”).



## Proposed Time Line for Fresh Start Sessions in the Search Process

Rector Exiting – Interim in Place - Profile						Profile Work - Profile Done - Candidates						Candidates Interviewed and Call Made					
Time Frame: Approximately 18 months																	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18

### **VESTRY (some material might be done jointly with the Search Committee)**

Good Exits Create Good Entrances  
Diocesan Process for Transition

Entrance and Transition (pre-Interim arrival)

Understanding Transition  
Change-Readiness in Transition

Church Size in Transition  
Role Clarity in Transition

Mutual Review of Ministry  
Entrance and Transition  
(pre-Rector arrival)

### **SEARCH COMMITTEE (some material might be done jointly with the Vestry)**

Understanding Transition  
Change-Readiness in Transition

History-Sharing in Transition  
Church Size in Transition

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
---	---	---	---	---	---	---	---	---	----	----	----	----	----	----	----	----	----