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SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING ASSOCIATE PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIMS

by

DARIUS CHAPMAN

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
Department of Human Resource Development

Andrea D. Ellinger, Ph.D., Committee Co-Chair
Rochell McWhorter, Ph.D. Committee Co-Chair

College of Business and Technology

The University of Texas at Tyler
May 2017

The University of Texas at Tyler
Tyler, Texas

This is to certify that the Doctoral Dissertation Proposal of

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A songwriter once wrote, "Every new beginning is some beginning's end." It is hard to believe that my dissertation journey is in many ways finally coming to an end. I still have the email dated March 21st, 2011, letting me know that I had been admitted to the Ph.D. program at The University of Texas at Tyler. Little did I know the joys and the struggles that the next several years would present. The journey had begun …

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Abstract

SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING ASSOCIATE PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIMS

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The University of Texas at Tyler
May 2017

The concept of succession planning is not new for organizations, as most will experience the loss of key personnel for a variety of reasons including retirement, termination, death, and unforeseen circumstances. Therefore, having a deliberate and systematic process for identifying, developing, and retaining key personnel makes succession planning critical to the long term viability of organizations.

However, challenges in the global marketplace, such as talent shortages, and the impending mass exodus of Baby-Boomers are making it more difficult to fill such vacancies. These challenges are even more pronounced in the non-profit sector which tends to have fewer resources to institute effective succession plans.

An important aspect of the succession planning process is identifying temporary replacements who can serve in the vacant positions until they are filled. These

individuals are referred to as interims, but they have been largely neglected in the succession planning and non-profit literatures. Therefore, this research examined how associate pastors within a non-profit protestant religious denomination, who served as internal interims, perceived and processed their experiences during and after serving in these capacities when they were not selected to fill the senior pastor positions permanently.

Accordingly, a qualitative phenomenological multiple-case embedded case study design was employed to explore the interim experiences of 15 associate pastors. Data was collected through semi-structured Skype interviews, observations and field notes. Interpretative Phenomenological Analysis (IPA) was used to analyze the data. The findings from this study contribute to the limited existing literature on internal interims and offer several practical implications and pathways for future research.

Chapter 1 - Introduction

Background to the Problem

Valentine (2012) very succinctly stated that, "change is inevitable in all organizations" (p. 125). Other scholars and practitioners agree that change is something that "everybody has to deal with" (Maxwell, 2009, p. 4). However, in today's global economy, the fast pace of the marketplace is creating turbulence that is challenging the way change is being addressed within organizations (Bogner & Barr, 2000; Carlopio, Harvey, & Kiessling, 2012; Desmet, Hoogervorst, & Van Dijke, 2015). Organizations, both within the profit and non-profit sectors, across varied industries and contexts, are facing increased competitiveness and the need to rapidly generate new ideas and leverage opportunities which have drastically altered the ways in which these organizations and their leaders address the present and plan for the future (Miller & Desmarais, 2007; Rothwell, 2011). Yet, even with the realization of the inevitability of change, most organizations are ill-prepared for both the anticipated and the unexpected changes that will take place (Higginbottom, 2014; Miller, 2005; Rothwell, 2011).

The first urgent scenario that organizations need to be prepared for is the impending transition of Baby-Boomer executives into retirement (Froelich, McKee, & Rathge, 2011). Lurey (2014) noted that 10,000 individuals are reaching retirement age every single day in the United States. According to the data in the 2010 U.S. census, there are currently 83 million Baby Boomers able to retire over the next ten years (Gibaldi, 2013). The looming reality is that, with the retirement of the Baby Boomer

generation, organizations are going to experience very real challenges in their ability to become more sustainable (Garg & Weele, 2012; Mirel, 2006). To varied degrees, organizations will experience instability and disruption due to change that comes from the loss of a wide berth of personnel in this generational category of employees (Ballinger & Marcel, 2010; Grusky, 1960).

In addition to Baby Boomer retirements, the second urgent scenario includes the shortage of talented professionals in key executive positions (Carman, Leland, & Wilson, 2010). Miller and Desmarias (2007) stated that the days of expecting to easily obtain the individuals needed to carry out the complex strategies of the organization are all but gone. They further contended that changes in the demographics within the global workforce, such as an increasing demand for skilled labor, aging workforce, and the declining of birth rates, has created a significant shortage with regard to the availability of human resource talent. Ahmadi, Ahmadi, and Abbaspalangi (2012) concurred with this development by suggesting, “Today labor markets are entering a new phase which is characterized by talented and efficient workforce scarcity” (p. 213). Similarly, Rothwell (2010) stated that, "Organizations may simply not be able to find all the talent needed to meet replacement or growth needs …" (p. 53). Therefore, resources, especially talented employees, will be in much greater demand thereby forcing organizations to focus on how best to evaluate, develop, and retain the leadership that are the key to further success (Miller & Desmarais, 2007).

Along with the increased inability of organizations to easily acquire the right people to perform particular functions and implement strategies, organizations are also experiencing the challenges that result from unforeseen and emergency situations that

occur (Miller & Desmarais, 2007). These unforeseen, emergency situations, such as when talented people within an organization suddenly perish, calls for prudence on the part of organizational leaders to address these potentially critical events (Aldape, 2005; Behan, 2007; Novello, 2009). The reality is that organizations are replete with surprises such as leaders departing unexpectedly for both voluntary and involuntary reasons including retirement, termination, or death (Santora & Sarros, 2012). Rothwell (2011) acknowledged that, in "an age characterized by terrorism, executive hostage taking, natural disasters and the possibility of a global pandemic …" (p. 88), it is imperative that organizations prepare themselves to address both the expected and the unexpected changes that can occur (Santora & Sarros, 2012). Unfortunately, most organizations do not have a plan in place to address the loss of key personnel that happens due to these unexpected changes (Garg & Weele, 2012).

Lastly, Khumalo and Harris (2008) noted that there are other types of changes that are taking place in the business world that organizations must be prepared to face. They stated that, "twenty first century organizations will be presented with opportunities to keep up with new technological and social trends driven by globalization" (Khumalo & Harris, 2008, p. 176). If mechanisms are not instituted to minimize the risks associated with these changes, ensure business continuity, and explore new avenues for potential growth, then organizations may be unable to maintain their advantages (Bennett, 2015; Corporate Leadership Council, 2003; Rothwell, 2005). Therefore, it is essential for organizations to be able to harness skilled talent, effectively integrate the talent with their strategies and goals, retain such talent if they hope to achieve success in the future, as

well as plan for the expected and unexpected changes where key personnel are concerned (Galagan, 2010).

With the varied changes taking place in the global marketplace, some organizations have been successful in overcoming these challenges by linking their leadership development programs with a well thought out succession plan to allow for an optimal identification of talent and then the proper development and placement of that talent (Bat & Yalcin, 2015; Conger & Fulmer, 2003). Garg and Weele (2012) stated that, "Succession planning can greatly reduce the skills gap within companies as management can identify potential gaps and recruit or develop employees" (p. 99).

Succession planning is that practice in which an organization has established a systematic, long-term process that allows for the business objectives and mission of the organization to be met through the use of managerial talent that has been purposely recruited, trained, and prepared (McKee & Driscoll, 2008). Seymour (2008) believed, "The future performance of any company is reliant on the thoroughness and vigor of today's succession planning" (p. 39). Therefore, as McDonald (2008) acknowledged, "Succession planning initiatives can help organizations address in a holistic manner the seemingly separate issues of recruitment, retention and planning for an organization's future" (p. 19).

During the past ten years, given the critical nature of both expected and unforeseen organizational transitions and the management of these changes, succession planning has emerged as a topic of utmost importance for all organizations, but especially within the non-profit sector (Carman, Leland, & Wilson, 2010). The Law Firm for Non-Profits (2015) stated that non-profit organizations are broadly defined as those

organizations that are "organized and operated for purposes other than making and distributing profits" ("What is a non-profit?," para. 1). Over 50,000 new non-profit organizations are approved by the Internal Revenue Service every year (Reich et al., 2009) and as of 2015, the Internal Revenue Service had approximately 1.5 million non-profit organizations registered with nearly 1.1 million of those registered being public charities or 501(c)(3) organizations (NCCS Business Master File, September, 2015). These non-profit organizations are divided into 10 major categories: (I) Arts, Culture, and Humanities, (II) Education, (III) Environment and Animals, (IV) Health, (V) Human Services, (VI) International, Foreign Affairs, (VII) Public, Societal Benefit, (VIII) Religion Related, (IX) Mutual/Membership Benefit, and (X) Unknown, Unclassified (Barman, 2013). The Nonprofit Academic Centers Council (2015) noted that the non-profit sector accounts for "10 percent of the United States economy, employs almost 10 percent of the workforce, and is assisted by more than 100 million volunteers" ("The Role of Nonprofit Organizations and Academic Centers," para. 2).

Due to the breadth of the organizations that fall under the non-profit umbrella, the potential crisis for this sector is further exacerbated due to the perception of an oncoming mass exodus of leaders within the Baby Boomer generation and the lack of skilled and willing individuals to fill those roles (Froelich, McKee, & Rathge, 2011; Johnson, 2009). Bell, Moyers, and Wolfred (2006) highlighted this concern by acknowledging a survey conducted by *Daring To Lead 2006* in which, out of the almost 2,000 executive directors of non-profit organizations that were part of the survey, 75% of those individuals did not plan to be in their job five years later and another 9% of them were already in the process of leaving.

The issue of replacing talent is of even greater concern for the non-profit sector because of a lack of strong leaders which will only get worse as the non-profit sector continues to grow and the leaders within the Baby Boom generation begin to retire (Froelich, McKee, & Rathge, 2011; Tierney, 2006). Von Bergen (2007) stated, "What worries nonprofit experts is the lack of potential replacements. It's a problem that goes beyond demographics and reflects more on operating conditions unique to the sector" (C1). In addition to the imminent loss of large numbers of top executives in the non-profit sector, many young non-profit workers are finding themselves reluctant to fill these positions due to the high level of stress and difficulty in successfully balancing their personal lives (Johnson, 2009).

Therefore, with all of the changes currently taking place in the global market place, particularly with regard to leadership transitions, the potential of a mass exodus of Baby Boomers, talent shortages, and the substantial challenges these changes pose to non-profits (Carman, Leland, & Wilson, 2010; Rothwell, 2011) it is important to realize both the negative repercussions that are inherent in transitional periods of leadership, as well as, the positive impact of a well thought out succession plan (Rothwell, 2002). Gothard and Austin (2013) contended that, "Managing the transition is a critical component of succession, regardless of whether the change in leadership was planned or a result of emergency-based succession" (p. 277). Yet, with the very critical and emotional role of transitions, most literature on succession planning with regard to replacing key personnel has focused on the two individuals at either end of the transition: the person who held the job and the person who will be taking over the job, and has

overlooked an extremely important individual: the interim (Ballinger & Marcel, 2010; Browning & Boys, 2015; Browning & McNamee, 2012).

The word "interim," by its very definition, denotes something that is temporary or a provisional arrangement (retrieved from http://dictionary.reference.com/browse/interim, 2015). Interims, therefore, are individuals who fill vacated positions in organizations on a temporary basis while the organizations' leaders begin the process of locating the permanent replacements for such positions (Chapp, 2014; Palisi, 2015). Interims are utilized in situations ranging from emergency fill-ins that are needed to carry on the day to day operations of organizations (Mooney, Semadeni, & Kesner, 2012; Neff, 1989) to a structured process in which they are intentionally used as part of succession plans (Rothwell, 2011). Interims are considered to have at least the basic skills needed to perform the requirements of the job long enough to allow for organizations to conduct suitable searches in which to fill the vacated positions on a permanent basis (Rothwell, 2011). The utilization of an interim during potentially turbulent interregnum or gap-periods of key personnel transitioning allows an organization to have a needed degree of maintenance and stability (Browning & Boys, 2015; Farquhar, 1995)

In the instances of a vacancy, especially an abrupt vacancy, the interim can serve as a mechanism to possibly allow for a smooth transition process from the previous executive leader to the new and permanent leader (Mooney, Semadeni, & Kesner, 2013). Santora and Sarros (2012) believed that "an interim may be a perfect short term solution for the organization and give a board ample time to find a suitable or even an ideal replacement for the departing executive" (p. 10). Browning and McNamee (2012) indicated that "… interims are a fixture in organizational leadership and often serve

during critical periods of change. As such, it is important to examine these leaders' actions and the social, organizational, and individual dynamics that inform them" (p. 729).

Statement of the Problem

Current literature tends to be plentiful with regard to executive level transitions in the for-profit sector (Froelich, McKee, & Rathge, 2011). However, it has basically been at a relative minimum in terms of guidance and processes adapted for non-profit organizations (Allison, 2002; Austin & Gilmore, 1993; Carman, Leland, & Wilson, 2010; Froelich, McKee, & Rathge, 2011). In addition, despite the research that highlights the increasing utilization of interims in organizations (Ballinger & Marcel, 2010; Mooney, Semadeni, & Kesner, 2012), the existing literature on temporary employees and temporary work arrangements has also generally failed to examine those employees who fill open positions and are already members of the organizations that are doing the hiring: internal interims (Browning & McNamee, 2012).

Internal interims fill vacated positions in times of transitions for a variety of reasons. These transition periods are significant events that are comprised of an emotional element that can tend to skew employees' perceptions and foster feelings of uncertainty for the future and loss of control (Allison, 2002; Ashford, 1988; Chaudhry et al., 2009; Wanberg & Banas, 2000). The appointment of an internal interim may serve as a means to advance an organization's agenda of forward momentum and organizational continuity. Yet, little has been done to consider the impact this appointment has on the individual that fills the interim position (Ballinger & Marcel, 2010; Browning & Boys, 2015; Goler, 2001). Browning and McNamee (2012) stated that, "… internal interims are

still largely neglected in scholarly and trade publications, and hence we know little about their potentially unique experiences and approaches to temporary leader positions" (p. 730). With regard to internal interims, the question then largely becomes how do "members with newfound but temporary power perceive their unique circumstances, and perhaps more importantly, how personal attributes and organizational dynamics shape their perceptions and subsequent actions"? (Browning & McNamee, 2012, p. 731). Therefore, given the current shortcomings in the scholarly literature with regard to internal interims, scholars contend that more research is needed, particularly in the non-profit context (Browning & McNamee, 2012).

Purpose of the Study

The purpose of this study was to explore how internal interims perceive and process their interim experiences both during and after serving in that capacity.

Theoretical/Conceptual Underpinning of the Study

Steinke once noted that "transitions disrupt patterns" (Nicholson, 1998, Foreword). Transitional periods are times of change in which employees are more sensitive on a personal level to the possible negative impact that the change will have on their employment relationships (Chaudry et al., 2009). If these employment relationships are perceived in a negative light from the vantage point of the employee, then the individual employee is increasingly likely to engage in systematic cognitive processing of the situation: sensemaking (Chaudhry et al., 2009; Louis & Sutton, 1991).

Karl Weick first introduced the concept of sensemaking within the context of organizational studies (Miner et al., 2005). Sensemaking is defined as the "process of organizing … in which people concerned with identity in the social context of other

actors engage ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less order into those ongoing circumstances" (Weick, Sutcliffe, & Obstfeld, 2005, p. 409). Weick (1995) highlighted seven properties that are facilitated through sensemaking: Personal identity and/or identification, retrospection, the ability to enact an environment through dialogues and narratives, a social aspect, the ongoing nature of the sensemaking, the opportunity to extract cues, and the use of plausibility over accuracy. Therefore, sensemaking theory allows for the opportunity to identify those salient characteristics associated with the change event that are considered triggers for the employee in regards to the psychological contract that is being altered thereby affecting the employee's perception of the employment relationship (Chaudry, Wayne, & Schalk, 2009).

With regard to internal interims, drawing upon Weick's sensemaking theory allowed for the ability to focus on how these employees not only perceived their roles as interims, but how they further enacted their roles based on these perceptions (Browning & McNamee, 2012). Along with personal characteristics such as prior experiences and previous decisions, sensemaking shaped the subsequent actions of interims at the conclusion of their tenure (Browning & McNamee, 2012).

Research Question

This study was guided by the following research question: How do internal interims perceive and process their interim experiences both during and after serving in a transitional period within their respective organizations?

Overview of and Influence of the Pilot Study on the Main Study Design

A small scale pilot study consisting of two associate pastors, who had previously served as internal interims within their respective congregations, was conducted in the Spring 2016 semester under the direction of the dissertation Co-Chairs. The pilot study was approved by The Institutional Review Board at The University of Texas at Tyler. The purpose of the pilot study was to assess the feasibility of the design of the study by ensuring that participants for the study could be obtained, data collection procedures and analysis were appropriate, and to examine the clarity and utility of the interview protocol (Baker, 1994; Chenail, 2009; Polit et al., 2001). Conducting a pilot study enabled the researcher to gather and analyze data from a smaller sample size, thereby allowing the researcher the opportunity to address potential biases, make adjustments on the method being used, and adapt the interview protocol for the study (Chenail, 2009; van Teijlingen & Hundley, 2001).

The two associate pastors were purposefully selected using a criterion purposeful selection process, having met the criteria for participation. Both pastors were interviewed using Skype. The interviews were recorded with the participants' permission and transcribed verbatim. The transcripts were then coded, and emerging themes were noted. The data was analyzed using Interpretative Phenomenological Analysis (IPA). Using IPA allows for the researcher to more fully explore participants' views on the area of interest within the study, as well as, include the researcher's interpretation of those views thereby making sense of the information outside of the participant's personal world of experiences (Breheny & Griffiths, 2017; Smith, Jarman, & Osborn, 1999). Preliminary insights drawn from the analysis of the two pilot interviews highlighted that there were

political dynamics that influenced the interims' appointments and the processes at each respective congregation, as well as, evidence of emotional turmoil for the interims.

Conducting the pilot study and sharing the preliminary results with the dissertation committee at the time of the proposal defense influenced the design of the main study in six notable ways. First, in terms of obtaining the sample for the main study, the researcher determined that also using snowball sampling with pastors who agreed to participate would expand the potential pool of study participants, along with the use of recruitment notices to obtain additional participants. Secondly, the timeframe for the associate pastor transitioning back into the former role (or assuming a new role) was adjusted from 5 years up to 8 years to ensure an appropriate amount of time had elapsed for sensemaking to occur as well as to ensure a reasonable sample size could be achieved. Thirdly, the researcher became aware of personal assumptions and biases he made with regard to terms, structure, and other aspects of the protestant denomination. Next, the interview protocol was expanded and refined to more fully capture the "career history" of the pastors who served as interims, to probe more deeply into their actual experiences, and to focus on the "before, during, and after" of the interim appointment. Fifthly, the interviews were lengthened to a 60-75 minute timeframe. Lastly, it was realized that more attention needed to be given to IPA analysis.

Overview of the Design of the Main Study

The design of this study was a qualitative phenomenological multiple-case embedded case study approach (Creswell, 2013, 2014). The goal of phenomenological research as noted by Moustakas (1994) is to "explore and search for the essential, invariant structure (essence) or the central underlining meaning of the experiences that

contain both the outward appearance and inward consciousness based on the memories, images and meaning" (p. 52) of those participating in the study. Creswell (2007) concurred with Moustakas noting that the focus of a phenomenological method is to more fully understand the essence of the lived experiences of a phenomenon. In addition, the utilization of a multiple-case embedded study approach allows for the "exploration of a phenomenon within its context using a variety of data sources" thereby ensuring "that the issue is not explored through one lens, but rather a variety of lenses which allows for multiple facets of the phenomenon to be revealed and understood" (Baxter & Jack, 2008, p. 544). Therefore, the utilization of this type of qualitative inquiry will provide a method of research that is both rigorous and thorough (Moerrer-Urdahl & Creswell, 2004; Moustakas, 1994).

Research Setting

It is estimated that there are 350,000 religious congregations throughout the United States that are classified as non-profits (Reich et al., 2009). These congregations comprise a membership of over 150 million people (Grammich et al., 2012). These congregations serve a variety of purposes within their communities. They are often the backbone for serving larger voluntary organizational networks that work to impact the lives of people, especially the poor and forgotten (Bielefeld & Cleveland, 2013; DiIulio, 2004). It has been estimated that out of all of the non-profit human service organizations in the United States, approximately 20% of them are religious organizations (Allard, 2007; Ebrahim, 2010; Grønbjerg & Smith, 1999).

Within this crucial non-profit sector of religious organizations is a mainline protestant Christian denomination. This mainline protestant denomination has been in

existence over 150 years and currently boasts a membership of over 2 million baptized members spread out over several thousand congregations throughout the United States. This denomination has close to 10,000 ordained ministers (pastors) serving in these congregations. The mainline protestant denomination also has a strong history of Christian education and currently is comprised of over 2,000 schools throughout the United States and employing well over 15,000 educators teaching at these facilities. Lastly, this mainline protestant denomination and its auxiliary organizations are actively engaged both locally and internationally to meet a wide variety of the physical, emotional, and spiritual needs of the individuals living in these various communities. This protestant denomination has been considered an integral part of Christianity in America.

The congregations of this mainline protestant denomination, much like other for-profit and non-profit organizations, must also be prepared to address expected and unforeseen transitions as part of the succession planning process. When the leadership transition involves the senior pastor, it presents complex issues for the congregation that can be uncertain and challenging. Yet, such pastoral transitions may also present opportunities for the full potential of a congregation to be realized (Mead, 2012). Mead (2012) noted that, "The period between pastors is a time of growth and development that can lead to a much stronger congregation – if the time is taken to do the work well" (p. 22). This is of critical importance because research that has been conducted nationally on over 52,333 Protestant churches highlighted that the average tenure of a senior pastor has dropped to 3.6 years with any given congregation (Rainer, 2005, 2014).

Pastoral successions are one of the pivotal events within the life of a congregation and, when they are done well, there is the opportunity for the reenergizing and revitalization of a congregation to occur. However, when done poorly, the efforts previously devoted to ensuring the success and vitality of a congregation can deteriorate quickly leading the congregation into a downward spiral (Banks, 2014).

Research Participants

This study, therefore, used a purposeful criterion sampling strategy of pastors serving within a specific mainline protestant denomination. Specifically, 15 pastors were identified who had served in a multi-pastored congregation in the capacity of associate pastors at the time in which the senior pastor positions within their congregations became vacant. Upon the vacancy of the senior pastor positions, the associate pastors served as internal interims to fill the senior pastor positions until permanent replacements were found for the senior pastor positions. The associate pastors included in this study did not obtain the positions of senior pastors within the congregations they were serving as interims during this vacancy period. These 15 associate pastors represented two associate pastors that comprised the pilot study, along with 13 associate pastors that were subsequently interviewed. All of these pastors met the criteria for the study in that at least 8 years had elapsed since the time of their interim experiences and they were geographically distributed throughout the United States.

Data Collection and Analysis Approaches

Interviews are increasingly being used in qualitative research as the principal technique for data collection (Aborisade, 2013; Cooper & Schindler, 2006). This study used semi-structured interviews as the primary method of data collection to further

explore how associate pastors processed their interim experiences both during and after their tenure serving in the senior pastor position. The use of the semi-structured interview format allowed for the participants to have a degree of leeway in how they responded (Bryman & Bell, 2011) and allowed them the possibility to more fully share their story (Feldman et al., 2004). In addition to the use of semi-structured interviews, observations were used along with detailed field notes (Bryman & Bell, 2011; Merriam, 2009).

All of the interviews conducted were recorded with the permission of participants and were transcribed verbatim by the primary researcher who conducted the semi-structured interviews. Interpretative phenomenological analysis (IPA) (Smith, 2004; Smith & Osborn, 2003) was used to analyze the data and allowed for a fuller portrayal of the interims' experiences. Interpretative phenomenological analysis strives to make sense of the personal experiences of participants within a research study through the analyst (Pringle et al., 2011; Smith, 2004).

Validity and Reliability in the Qualitative Tradition

To ensure validity and reliability in the qualitative tradition, all interview transcripts were reviewed by the participants for accuracy as well as to confirm or disconfirm the researcher's interpretation of the insights that participants shared that emerged into themes across the sample as a form of member checking. Thomsen et al. (2000) stated that member checking is "perhaps one of the most important tactics for establishing trustworthiness and credibility" (p. 8). In addition, peer and colleague examinations were used to allow for the establishment of increased credibility (Baxter & Jack, 2008). Lastly, an audit trail was maintained to allow for the confirmability of the

research findings and to provide sufficient details thereby allowing for the possibility of other researchers to repeat a similar investigation within the same setting (Beck, 1993; El Hussein, Jakubec, & Osuji, 2015).

Significance of the Study

This study is compelling, appropriate, and relevant to the field of Human Resource Development (HRD) because the topic of succession planning, while considered critical, has been underdeveloped when considering research related to how internal interims make sense of their tenure as interims once they have transitioned back to their former positions (Browning & McNamee, 2012; Santora, Caro, & Sarros, 2007). Scholars have acknowledged the need to explore how those who fulfill roles as interims during a period of vacancy are impacted with regard to their personal understanding of their roles as employees within the organizations for the longer term (Browning & McNamee, 2012; Goss & Bridson, 1998) and this study sought to address this shortcoming. Specifically, this study adds to the limited empirical literature on internal interims by exploring the impact that the traumatic and intense periods of transition had on those who fulfilled the roles of internal interims within the non-profit context, and more specifically within a religious setting where leadership upheavals have become more commonplace (Goler, 2001; Kesner & Sebora, 1994; Marcheschi, 2013).

In addition, this study provides several implications for practice with regard to the unique challenges that succession planning and internal interims face within the context of non-profit organizations, and more specifically within a mainline protestant denomination religious context. In general, non-profits frequently struggle with several issues including an impending leadership deficit (Froelich, McKee, & Rathge, 2011), a

smaller talent pool compared to for-profit organizations (Santora, Caro, & Sarros, 2007), the ability to cultivate future leaders (Tierney, 2006), and their apparent lack of consistently developing a successful succession plan (Froelich, McKee, & Rathge, 2011). Within religious organizations, like this mainline protestant denomination, some of these challenges become even more manifest. Therefore, the findings of this study provide insights about the experiences of internal interims and how such interims can be better prepared when they are appointed for succession planning purposes, improvements to the process of identifying successors, such as senior pastors, and how efforts to help associate pastors readjust to their original positions can be developed, specifically within this religious context.

Assumptions

There are four general assumptions that were made with regard to this study: (1) non-profit organizations vary to some degree in their organizational structure and business strategy depending upon what non-profit category that they represent. Therefore, some non-profit organizations, like religious organizations, may have some unique outcomes that are relevant only to them; (2) not all of the internal interims recruited for this study desired to obtain the open senior pastor positions on a permanent basis; (3) the process of sensemaking and its ensuing outcomes on the part of the former internal interims will have a degree of impact on their perceptions of their experiences during the interim process; and, (4) those participants being interviewed can honestly and accurately recount their roles and experiences serving as internal interims during and after the transitional period.

Definition of Terms

- Associate Pastor – an ordained pastor within the studied mainline protestant denomination who shares in all of the duties of the pastoral office within a congregation while also having specific areas of ministry focused assigned to them.
- External Interims – typically experienced professionals outside of the organization who contract to fill a vacated position for a finite period (Elsner & Farrands, 2006).
- Interim – those individuals who fill a vacated position in an organization for a temporary period allowing the organization "to make decisions about the position within the organizational structure and to develop and conduct an effective search process" for the permanent successor (Alley, 2005, p. 322).
- Internal Interims – those employees who are hired internally to fill a vacated position within the organization during a period of personnel transition (Browning & McNamee, 2012).
- Non-profit organization – a corporation that is designed with the intent of not being a profit-making corporation with the understanding that these organizations still mostly strive to have revenues greater than expenses (Bruce R. Hopkins' Nonprofit Counsel, 2007).
- Pastor – Derived from the Latin word "shepherd," pastors (also called ministers) within this mainline protestant denomination are tasked with the main responsibilities of preaching and teaching the Gospel (Christ's teaching on

salvation as taken from the Bible), administering the sacraments (Baptism and Communion), hearing the confessions of penitent individuals, and serving to comfort those whose are sick.

- Religious related non-profits – defined by the Internal Revenue Service as either churches which generically includes all places of worship, conventions, associations, and auxiliaries of churches or religious organizations such as nondenominational ministries, interdenominational and ecumenical organizations, and other entities whose principal purpose is the study or advancement of religion (Internal Revenue Service, 2015).
- Replacement planning – "the process of identifying short-term and long-term emergency backups to fill critical positions or to take the place of critical people" (Rothwell, 2011, p.88).
- Senior Pastor – while maintaining the chief responsibilities of the role of a pastor, these individuals are tasked to "serve the church by providing spiritual leadership, pastoral care, administrative oversight and organizational direction to the congregation, with a broad program of worship, music, preaching, teaching and fellowship."
- Sensemaking – the sequence in which individuals retrospectively take cues from an ongoing circumstance within a social context in which other actors are engaged and make plausible sense of that scenario thereby delegating a degree of order to those circumstances (Weick, 2005).
- Standard work arrangement – "full-time employment on a continuing basis and subject to full employment legislation" (Russam, 1996, p. 31).

- Succession Planning – the wide array of processes, procedures, and activities that are established in planning for the transition of key personnel within the organization (Garman & Glawe, 2004).
- Temporary employee - individuals hired by an organization to assist with meeting business demands while also allowing the employer to forego the various costs associated with a regular employee (Heathfield, 2015).

Organization of the Dissertation

The dissertation is divided into six chapters. Chapter 1 has presented the background to the problem, the statement of the problem, the purpose of the study, theoretical underpinning and guiding research question. It has also provided a summary of the pilot interviews that were conducted and articulated the design of the main study, the significance of the study, assumptions, and definition of terms. Chapter 2 presents a review of the relevant domains of literature in support of the study. Chapter 3 provides an overview of the design of the main study following insights drawn from the pilot interviews. It describes the sampling approach, data collection and analysis that were used in conducting this study. Issues associated with reliability and validity from a qualitative perspective are discussed, along with the limitations associated with the study. Chapter 4 presents individual portraits of each of the participants. Chapter 5 provides the findings that emerged across the participants in this study. Lastly, Chapter 6 presents the discussion of the findings, conclusions, and implications for practice, and future research pathways.

Chapter 2 – Review of Literature

Introduction

This chapter will review the literature relevant to studying employees who fulfill the role of internal interims during a vacancy period in their organization and how they process their experiences, both during and after their interim tenure, through the lens of sensemaking. The review is organized into five sections. The first section begins by providing the background and need for succession planning and then specifically reviews the concept of succession planning in organizations by defining what it is, discussing why it is important, the various component that comprise a succession plan, and the challenges and impediments associated with succession planning. The second section specifically examines the non-profit sector and the unique challenges and differences that non-profit organizations navigate through in establishing and utilizing effective succession planning processes and procedures. The third section introduces the concept of replacement planning within succession planning and considers the decision processes associated with internal and external replacements. The fourth section introduces the concept of the interim, the temporary replacement who serves in a vacated position, describes the varied roles of the interim, the vantage points from which an interim perceives the interim situation, and then considers the distinct role of the internal interim. The use of interims, and particularly internal interims, within the religious sector of non-profit organizations is examined. The fifth section introduces and examines the role of sensemaking as it relates to internal interims processing their role both during and after serving in such a capacity during a transitional period. Chapter 2 concludes with a summary highlighting the review of literature that supports the need for this study.

The University of Texas at Tyler Robert R. Muntz Library was used for conducting this literature review. The following databases were used: SAGE, Emerald Insight, Elsevier B.V., Wiley InterScience, Wiley Periodicals Inc., ProQuest, and EBSCO Publishing. In addition, the Clinton-Macomb Public Library in Michigan was also used to supplement the search process. The following keywords and phrases were used individually and in combination for the search: internal interims, succession planning, non-profit organizations, not-for-profit organizations, non-standard work arrangements, interims, replacement planning, succession management, non-profit history, and sensemaking. The reviewed documents (generally published from 2000 through 2015) included peer reviewed journals articles, literature reviews, books, dissertations, and trade publications.

Succession Planning

Background and Need for Succession Planning

Change is consistently mentioned as the defining quality of the modern workplace (Chaudhry et al., 2009). A significant change, especially within the ranks of key personnel, will be undeniably felt with the Baby Boomer generation reaching retirement age (Froelich, McKee, & Rathge, 2011). As McDonald (2008) stated, "While workplace experts speculate on whether boomer retirements will come in small, manageable waves or ones of surprising strength and size, the basic facts remain indisputable: Experienced professionals will begin to leave their organizations at a faster rate than most companies can replace them …" (p. 21). Froelich, McKee, and Rathge (2011) added that, "Finding qualified, motivated leaders to fill all the vital executive positions vacated by this

generation is going to present pressing challenges for many organizations, nonprofit and for-profit alike" (p. 4).

Miller and Desmarais (2007) addressed one of the challenges of this exodus by stating, “Having more job demand than supply of available qualified individuals in the labor force has led both international and local companies to compete aggressively for talent” (p. 37). Groves (2007) concurred noting a US workforce statistic that states “… as the baby boomer generation retires and far fewer college-educated workers are prepared to replace them” organizational structures are going to be faced with some incredible obstacles (p. 240).

One of those obstacles is the apparent skills gap that exists within organizations' current employee base that will be further exposed in the near future as employers are pressed to hire more knowledgeable workers for the increasingly higher skilled jobs required to help organizations grow (Galagan, 2010). When there is a gap between the capabilities of an organization's employees and the actual requirements needed to achieve particular goals, then the organization is at a point where it is unable to remain competitive because the skills and abilities that are needed are not readily available (Galagan, 2010). Yet, it seems like "Most organizations are realizing only now that their sole competitive edge is the bench strength of current and future leaders” (Aldape, 2005, p. 1).

The loss of key personnel and the need to replace them are both a challenge and opportunity that all organizations face (Friedman, 1986). Organizations must prioritize the succession planning process and all that entails to be better prepared for the expected and unexpected changes that are present in the global economy (McDonald, 2008).

Failure to implement a well thought out succession plan will lead to the reduction in structures and opportunities of succession development thereby causing difficulties in acquiring the future workforce, limiting budget resources, and then leading to the departure of active leaders within the organization (Ahmadi, Ahmadi, & Abbaspalangi, 2012).

This lack of preparation on the part of organizations to make a conscious and continual effort to retain and develop leaders poses both short-term and long-term consequences (Gothard & Austin, 2013). Therefore, with this potential dilemma facing organizations, Seymour (2008) posited that "The key to future success lies in assessing and understanding the value of the human resources you have at present and what resources you are likely to need in the coming years" (p. 39). Aldape (2005) added to this by stating that, "… there is evidence that succession planning can pay dividends in many ways, and not just for high-potential employees" (p. 1).

It is within this context that succession planning and the individuals who are utilized to make them successful are explored.

Succession Planning – What Is It?

Succession planning has been defined in many ways. According to Rothwell (2001), succession planning is the intentional effort on the part of an organization to ensure that there is continuity in key leadership positions within it. Further Rothwell (2010) stated, "Succession planning is traditionally a strategic change effort designed to prepare people for promotion within an organization by emphasizing internal talent development" (p. 51). Garman and Glawe (2004) defined succession planning as the wide array of activities that are established in planning for the transition of key personnel

within the organization. To them, succession planning is "a structured process involving the identification and preparation of a potential successor to assume a new role" (Garman & Glawe, 2004, p. 120). Huang (1999) stated that “Succession planning is the process by which pools of candidates possessing critical competencies are selected to fill higher-level management positions in business firms" (p. 609).

Therefore, succession planning encompasses those processes and approaches that utilize assembling, analyzing, and information retention to identify those employees with managerial potential and then further develops them for their future within the organization (Huang, 1999; McConnell, 1996). Furthermore, it is the practice in which an organization establishes a systematic, long-term process that allows for the business objectives and mission of the organization to be met through the use of managerial talent that has been purposely recruited, trained, and prepared (McKee & Driscoll, 2008; Rothwell, 2002).

Regardless of the various definitions, succession planning is focused on providing a smooth transition within leadership (Walker, 2005) and, in many cases, allows for the possibility of those in current leadership roles to have an active participation in preparing their potential successor (Valentine, 2012). When done effectively, succession planning ensures the continued effective performance of an organization by establishing a process to develop and replace key staff over time (King, 2005). In short, it ensures that talented leaders fill the key roles necessary to navigate a clear path forward for an organization (Waller & Polite, 2008).

To some degree, the practice of succession planning has been documented throughout recorded history through situations such as the transition of power that took

place within royal families or business empires that were family-owned (Garman & Glawe, 2004). From an organizational stand point, it initially had its origins as a top down, reactive process that organizational leaders engaged in with little to no input from their employees (Lacey, 2003). It was mainly seen as a process to groom understudies or to possibly tap into heirs apparent (Leibman et al., 1996).

Today, succession planning is a way to perpetuate "the enterprise by filling the pipeline with high-performing people to assure that every leadership level has an abundance of these performers to draw from, both now and in the future" (Charan, Drotter, & Noel, 2011, p. 167). It is a deliberate and systematic process with the intent to identify, develop, and retain those individuals who are able to implement the current and future goals of the company through the use of their array of leadership competencies (Lacey, 2003; Rothwell, 2011).

McDonald (2008) believed that succession planning "is as much about developing employee's capabilities as it is about identifying probable replacements" (p. 21). Today's succession planning addresses areas that range from top management succession to a thorough focus on the systematic development of internal talent (Froelich, McKee, & Rathge, 2011). Rothwell, Bernhard, and Alexander (2008) suggested that, " … succession planning focuses on building the organization's internal bench strength so that individuals who are interested in promotion are given a chance to become qualified through systematic development" (p. xi). Over time, what was once a reactive process of job replacement within the corporate business world has become a more proactive process with a longer-term view (Lacey, 2003).

The Importance of Succession Planning

When the reality of the need for succession of key personnel has or is about to take place within an organization, it is important to realize that this is a major event within the life of the organization (Santora, Caro, & Sarros, 2007). These times of transitions are inevitable and they have an effect on the entire organization (Watson & Fansler, 2009). From the shop floor to the boardroom, a successful succession plan understands the potential impact that these changes and processes can have during times of notable transitions (Garg & Weele, 2012).

In addition, Khumalo and Harris (2008) hypothesized that "a company that has a succession plan strategy before a CEO or other member of the upper echelon departs from office will experience a more successful and effective leadership transition than a company that does not have a succession plan" (p. 170). Therefore, having an established succession plan in place will allow for a smoother transition of the leadership within the organization (Walker, 2005).

Besides ensuring a smoother transition during a period of personnel transition within an organization, succession planning is also important for various other reasons. One example is that it allows for a disciplined process where the talent within the organization's leadership can be properly assessed (Leibman et al., 1996). When key personnel exit the organization an opportunity presents itself for the organization to more fully examine its present leadership needs, the history of the organization, and what its future is within the community (Gothard & Austin, 2013). In addition, Leibman et al. (1996) added, "succession planning also gives you the chance to reassess what competencies your company wants from its leaders" (p. 29).

Another important reason for having a formal succession plan in place within an organization is that it has the potential to lead to increased worker enthusiasm, a reduction in anxiety, and it provides a barrier to help prevent selection bias during the process of hiring a replacement (Gothard & Austin, 2013; Greer & Virick, 2008). According to McDonald (2008), "Besides helping companies assess and prepare for future leadership needs, succession planning initiatives have a positive effect on employee motivation and retention" (p. 21). Miller and Desmarias (2007) echoed these thoughts by noting that having a purposeful and planned investment in the talented individuals that make up an organization is the primary way to positively influence the retention of these individuals and successfully utilize them within the succession plan of the organization.

In contrast, there are important consequences for not having a well thought out succession plan. Garg and Weele (2012) noted that the lack of a proper succession plan can directly affect the collapse of a business especially when the key players within the organization retire or leave the business in pursuit of other options. Getty (1993) indicated that "When organizations fail to treat their succession plans as living documents, they not only threaten their own continuity, but also lose an opportunity to revitalize their organization" (p. 31). McDonald (2008) concurred by noting, "… firms that engage in succession planning … are investing in nothing less than their own future" (p. 21).

There are also additional consequences for organizations that do not employ a well thought out succession plan:

> Because time has become a strategic resource, organizations cannot afford the delays in decisions that may result when decision makers are absent – or gone

> forever. Delays in decision making may lead to lost business, dissatisfied customers, disgruntled employees, reduced work efficiency and missed production or service delivery targets. And when leaders of organizational units are lost, the workers in those units may demonstrate risk-adverse behaviors while they wait to see the agenda of the new leader. That, in turn, may lead to loss of innovation and productivity for an entire division or department while workers 'lay low' until a new leader is appointed. (Rothwell, 2011, p. 89).

Granted, while an organization may be able to survive both expected and unexpected transitional changes, the results of these changes are going to create serious organizational disruptions, as well as, other negative outcomes (Santora & Sarros, 2012). The departure of key individuals within an organization has the potential to make an organization more vulnerable and potentially diminish its worth thereby making investors less likely to invest in the company because they do not find it to be sustainable (Garg & Weele, 2012). Therefore, not establishing a well thought succession plan puts the organization and its stakeholders at an increased risk and therefore is paramount to insufficient and negligent planning (Santora & Sarros, 2012).

Yet, when a succession plan has been established that is effective and efficient, the organization is able to move forward with minimum disruptions to everyday transactions and set forth a culture that allows for long-term development (Santora, Sarros, & Esposito, 2014). Gothard and Austin (2013) noted that this transitional period provides an organization the possibility to reposition itself, to reflect on its history, examine its leadership needs, and evaluate its future role in the community (p. 273). Hence, establishing an overall succession plan to provide competent and consistent management within a workforce is crucial for not only the peace of mind of investors, but also for the continued negotiating of power of the organization (Seymour, 2008).

In summary, with regard to the overall importance of succession planning, Seymour (2008) stated, "rather than just being a way of averting the dangers of a foreseeable motivational and management vacuum, it can be an opportunity to refresh, revitalize or reposition a staid enterprise in a rapidly changing world" (p. 37). Santora, Sarros, and Esposito (2014) concurred by acknowledging, "Get the succession right, and all things must follow" (p. 19).

The Components of Succession Planning

Karaevli and Hall (2003) believed that if a succession plan is going to be effective then more focus needs to be given to improving practices and developing competencies so an organization can meet both present and future challenges such as environmental turbulence, shortage of talent, and globalization. In addition, due to the precarious nature of transitions that an organization undergoes when key personnel leave, it is paramount for those with the responsibility of managing the succession to make the process one that is well thought out and handled with excellence (Allison, 2002). With an understanding of what succession planning is and why it is important, outlining the actual components needed to design the processes and procedures for a successful succession plan is crucial. Therefore, by proactively identifying action steps to be taken in the case of both expected and the unanticipated departure of key personnel, the organization will be better prepared to address the actual succession planning process (Gothard & Austin, 2013).

The components that need to be included in constructing a successful succession plan vary to some degree. For example, Aldape (2005) believed that for a plan to be successful it needs to have a sincere commitment from an organization's top management, a vision for the organization's future direction, knowledge of existing staff,

objectivity and openness to change, a purposeful training and development program, and ongoing review of these various elements. Getty (1993) added more broadly, "Successful succession planning calls for participation, openness, feedback, and usage. Like individual steps in a staircase, these characteristics support each other and ensure the stability of the structure as a whole" (p. 31). While other scholars note that a succession plan must have the procedures in place to address not only the transfer of individuals in a particular role, but also the legal and financial considerations, psychological factors, needed leadership development and future exit strategies (Ip & Jacobs, 2006).

In terms of an overall process, Lacey (2003) indicated that, "Effective succession planning identifies future organizational needs (capabilities), and potential future leaders; inspires leadership aspirations; bases the selection processes and program design on future leadership capabilities; creates pools of talent; and recognizes multiple paths to leadership … Strategic succession planning provides opportunities for current leaders to develop capabilities, and access new challenges" (p. 192). Carman, Leland, and Wilson (2010) believed that examples of this have been seen in succession plans where they have focused "… on developing human capital within an organization by identifying talented individuals early in their careers, especially those with specialized knowledge and skills; creating assignments or developing projects designed to strengthen individuals' skills and broaden their experiences; and improving retention through competitive salaries" (p. 106).

With a vast amount of overarching suggestions listed from scholars, Rothwell (2010) succinctly outlined the various key process components that are needed for a succession plan to be successful:

- The commitment by management must be verified and upheld;
- There must be clarity in regards to what is needed in terms of people and work required to handle the current needs of the organization;
- Performance should be measured and an accountability system should be maintained;
- There must be clarity in regards to what is needed in terms of people and work required to address the strategic objectives of the future;
- System designed to effectively assess those employees eligible for promotion;
- Utilization of talent reviews and personal development plans to diminish potential developmental gaps and accentuate individual strengths; and,
- Evaluate results as compared to program goals (p. 51).

Being conscientious of the various components needed to make a succession plan effective can assist an organization in maximizing all the opportunities present in light of the challenges that are involved (Froelich, McKee, & Rathge, 2011). It proactively "… encourages leaders to review the demands of the business and identify and provide solid developmental experiences for high performance and high potential employees" (Lacey, 2003, p. 192).

Ultimately, the key components needed to make up a successful succession plan have to be strategically focused on an approach to align organizational thinking with the external environment along with the specific needs of those individuals within the organization (Lacey, 2003). It is this combination of solid processes and good leadership that allows an organization to experience better continuity in leadership positions, reduced turnover, the retention of key personnel, and the continued opportunity to

influence the bottom line results (Barnett & Davis, 2008). A good succession plan is one that understands the litany of business issues that an organization will face in the future and the type of leader that will be needed to handle the job (Barnett & Davis, 2008). In the end, the results for succession plans are that the processes and procedures have been structured in a way that potential successors are positively identified and prepared in both a reliable and repeatable manner (Garman & Glawe, 2004).

Despite the positive benefits articulated for those organizations that develop and implement a succession plan, as well as the potential consequences for those that do not, many organizations are still not initiating such plans even though the research supports the need for succession planning in an organization (Charan, 2005; Charan, Drotter, & Noel, 2011; Rothwell, 2005; Trice & Beyer, 1993). The problem is that the lack of a succession plan or the informal nature of others among a large number of organizations poses a threat to the overall health of these institutions (Mooney, Semadeni, & Kesner, 2013). If organizations want to be successful for the long term, it is critical that they have good management and good leadership in place (Berendt et al., 2012). However imperative succession planning is for organizations, there are documented challenges associated with it.

Challenges and Impediments Associated with Succession Planning

Establishing a succession plan can be challenging due to its disruptive nature in that "it sets the conditions for development of new policies, disturbs the traditional norms of the organization, and promotes changes in the formal and informal relationships among members of the system" (Grusky, 1960, p. 105). According to Gothard and Austin (2013), "The topic of leadership succession can stir up considerable emotion, fear,

stress, conflict, and questions, and thereby create potential discomfort between boards and executives" (p. 273). Kesner and Sebora (1994) articulated that "… succession is a traumatic event for any organization. It affects not only the members of the organization, but the firm's economic and political climate as well" (p. 328).

The impediments to succession planning are real and can range from work/time demands of those in the organization, a genuine lack of awareness of the potential future ramifications, a reluctance to stir up organizational politics, to a lack of willingness on the part of top management and/or Board of Directors (Froelich, McKee, & Rathge, 2011). Another challenge to successful succession planning revolves around the specific role of the organizational leaders in the process regarding filling the vacated position during a time of personnel transition relative to the specific needs of the organization which lends itself to complex arrangements that organizational leaders must address promptly (Mooney, Semadeni, & Kesner, 2013).

Richtermeyer (2011) also noted that the implementation of a succession plan has the potential to be one of the most difficult situations that faces an organization even when thoughtfully developed. Along with the other aspects of the succession plan, organizational leaders are often tasked with who will fill the vacated spot permanently, as well as, identifying plausible internal candidates, and deciding if a firm must be engaged in searching out external possibilities (Mooney, Semadeni, & Kesner, 2013). In addition, organizational leaders must also establish a replacement plan to address the short and long-term needs of the organization while the foundation and more sophisticated elements of the succession planning process are being established (Rothwell, 2011). Consequently, "when organizations fail to first identify or articulate key strategies, such

as how to deal with succession, they have no chance of implementing these strategies. So succession fails before it has had a chance to commence" (Santora & Sarros, 2012, p. 10).

Balser and Carmin (2009) have stated that "managing succession and subsequent changes can prove difficult in all types of organizations" (p. 186). They acknowledged that "these tasks may be more complex for nonprofits" due to the unique nature and focus of these institutions. (Balser & Carmin, 2009, p. 186). The challenges of managing personnel transitions within non-profits is highly relevant due to the relentless and changing demands of society (McKee & Driscoll, 2008) and the increasing needs of people for the services of the non-profit sector (Newman & Wallender, 1978).

A multifaceted study done by the Bridgespan Group on U.S. non-profits stated that over the next ten years it is predicted that 640,000 non-profit executives will need to be replaced (Tierney, 2006). With retirement age nearing for a record number of non-profit founders and executives, there is grave concern about the potentially debilitating effects of these key personnel exits and the future health of those within the non-profit sector (Gothard & Austin, 2013). The process of leadership succession, especially with key personnel, tends to present non-profit organizations with a whole set of challenges such as risk, a limited applicant pool, and the inevitable organizational change (Gilmore, 1988; Gothard & Austin, 2013; Khurana, 2001).

Additionally, the transition of key personnel are coming at a quicker pace as noted in a Compass Point survey that found for example that the average time that a non-profit leader is in their position is 5.9 years (Goler, 2001; Noble, 1988; Wolfred et al., 1999). Sinclair (2001) highlighted the changing nature of key personnel in non-profit organizations by discussing research in which only one out of the 18 CEOs/executive

director of high-profile non-profit organizations from 1994-2001 studied were still leading their organization at the end of that seven year period. Therefore, being able to find qualified individuals to successfully fill these vital positions, whether internal or external, is going to present a huge challenge for both non-profit and for-profit organizations alike (Froelich, McKee, & Rathge, 2011).

Froelich, McKee, and Rathge (2011) noted that with the anticipation of a substantial number of Baby Boomers reaching retirement age and transitioning out of their careers in conjunction with the growth in both size and number of non-profit organizations, along with limited resources and high turnover, there should be a concern of the impending leadership deficit. Therefore, it is imperative for non-profit organizations to thoughtfully develop succession plans to be able to address these most crucial events (Santora, Caro, & Sarros; 2007). However, the myriad of opportunities and challenges to be considered when setting forth to establish the processes and procedures needed to serve as the foundation for an effective succession plan in a rapidly changing global economy takes on a unique dynamic though when addressed from the vantage point of organizations established within the non-profit sector (Gilmore, 1988; Gothard & Austin, 2013; Khurana, 2001). Consequently, it becomes important and necessary to better understand the non-profit sector, and more specifically, "what are non-profit organizations?"

Non-Profit Organizations

The actual "creation" of the non-profit sector did not actually emerge until the early 1950's (Hamilton & Fund, 1995) with it eventually developing a recognized degree of unified coherence in the 1970's (Hall, 2010). The utilization of non-profits for various

social needs predates the American Revolution (Hammack, 1989). These organizations have moved from voluntary organizations centered around churches and schools to a broader spectrum encompassing organizations engaged in such areas as the scientific, educational, religious, and literary (Arnsberger et al., 2008).

The Statistics of Income Bulletin from the Winter, 2008 edition, highlighted this growth by noting that in 2004 the number of non-profit organizations had almost tripled in the past two decades to nearly 933,000 organizations being listed on the IRS Master File (Arnsberger et al., 2008). In addition, most churches and religious organizations are not required to apply for non-profit status and therefore were not included in the Statistics of Income Bulletin report thereby greatly increasing the actual number of non-profit organizations that are in operation (Arnsberger et al., 2008).

Within these non-profit organizations it is estimated that over 9.4 million Americans are employed with another 4.7 million individuals working as full time equivalents (FTE's) in the voluntary workforce of these organizations (Kahnweiler, 2011; Pynes, 2009). The combination of these groups totals over 14 million people working in non-profit organizations which accounts for approximately 10% of the U.S. population that is employed (Kahnweiler, 2011).

Additionally, the non-profit sector has been growing steadily over the past decade leading to the prediction by some that the employment rate of this sector will eventually outpace the for-profit and government sectors over the next 10-20 years (Kahnweiler, 2011; Leete, 2006; Pynes, 2009). Hall (2010) concurred stating that "nonprofits and NGOs are the most rapidly growing types of organizations in the world" (p. 3).

The non-profit sector is extremely diverse with there being very little in common between the various sub-sectors outside of the fact that these organizations are not for-profit or citizen driven but instead, mission driven (Kahnweiler, 2011). It is this common purpose that supports Drucker's (1990) contention that the growth in non-profit organizations is due to the intrinsic values that are found distinctly in American citizenship where the desire of the society is to provide essential services as they relate to a person's quality of life. Drucker (1990) noted that the focus and purpose of non-profit organizations is to impact the lives of people and to make a difference for the betterment of others.

Yet, even with these lofty goals, non-profit organizations are increasingly vulnerable to the changing dynamics of the global economy through issues related to public funding policies, varying social needs, and the anticipated leadership gap with the retirement of the Baby Boomers (Heimovics, Herman, & Jurkiewicz Coughlin, 1993; Tierney, 2006). In light of these challenges, it is crucial for non-profit organizations to have the right personnel in place to fulfill the mission of the organization because more and more of people's daily lives are becoming dependent on these various non-profit enterprises (Hasenfeld, 1989; Newman & Wallender, 1978).

Succession Planning in Non-Profit Organizations

A survey conducted in 2006 with almost 2,000 top level personnel working in the non-profit sector highlighted that 75% of these individuals did not plan on being at their current job in five years with another 9% already in the process of leaving their job (Bell, Moyers, & Wolfred, 2006). In addition to the imminent loss of large numbers of top executives in the non-profit sector, many of the young non-profit workers are finding

themselves reluctant to fill these positions due to the high level of stress and difficulty in successfully balancing their personal life (Johnson, 2009).

Froelich, McKee, and Rathge (2011) noted that the possible wave of leadership transition within the arena of non-profit organizations could prove to be extremely problematic for these various organizations. They acknowledged that "the significance of executive transitions will become more urgently felt as the large baby-boomer generation soon reaches retirement age" (Froelich, McKee, & Rathge, 2011, p. 4).

With the perceived mass exodus of leaders within the Baby Boomer generation and the lack of skilled and willing individuals to fill those roles, there appears to be a potential crisis for those in non-profit leadership (Johnson, 2009). Therefore, because of the potential and realized turnover of key personnel within many non-profit organizations today, it is imperative that non-profit organizations seriously develop a succession plan in preparation for these crucial events that impact the organization (Santora, Caro, & Sarros, 2007).

In establishing an effective succession plan for a non-profit organization, consideration must first be given to the many constraints that these organizations are faced with such as being thinly staffed, dealing with scarce resources, and usually working with a large number of volunteers (Froelich, McKee, & Rathge, 2011). Non-profit organizations, in general, do not have the resources to invest in recruitment and human resource initiatives that provides those opportunities for meaningful career development and thereby hiring and retaining key personnel (Tierney, 2006).

Yet, Santora and Sarros (2012) believed there are crucial elements of a succession plan that non-profits can institute within their own organization that will incorporate the

needed components for the proper processes and procedures of an effective succession plan while also addressing the unique challenges faced by organizations in the non-profit sector. An article in the Nonprofit Business Advisor (2014) lists some of these key components that non-profit organizations need to establish an effective succession plan:

- The right people need to be involved in the planning process;
- Govern the organization well by making 3-5 year plans, asking the right questions, and addressing the problems that face the organization;
- Collaborate to develop opportunities and experiences for those employees who are prospective candidates in the future;
- Develop the talent of more than one employee whom might be utilized in the future to fill a vacated position permanently; and,
- Create resources that potential successors can utilize to learn about the responsibilities of different positions and provide items such as videos, podcasts, and webinars, when appropriate, to assist in the understanding of the key areas of focus for that position. ('Short view' on nonprofit succession planning doesn't cut it anymore, p. 6)

In addition to these components, Mastowski (2013) noted that an internal assessment is necessary to determine the skills that are currently within the organization thereby allowing the organization the opportunity to begin addressing potential gaps. There is also a need for routine monitoring and review of the succession planning processes and procedures that allows for verification that the plan is effectively doing what it was designed to do (Mastowski, 2013). Lastly, an organization should strive to bring clarity to the succession planning process allowing for a degree of certainty and

preparedness in the organization that allows for support from the employees during those times of transition (Gray, 2015).

Though the concept of succession planning is not something new for organizations (Mastowski, 2013), historically there seems to be an apparent disconnect between how organizations view the importance of having a succession plan and the actual actions that organizations have taken toward developing and implementing a plan (Froelich, McKee, & Rathge; 2011). Over the past decade though, there has been an emergence amongst organizations in the non-profit sector with regard to the importance of the issue of succession planning (Carman, Leland, & Wilson, 2010). Organizations are more readily realizing that a strong succession plan can take the various challenges that an organization faces and turn them into an opportunity (Mastowski, 2013). When it comes to planning for the future, "now" is the right time to begin addressing what needs to be done to face the challenges of tomorrow (Gray, 2015).

Challenges with Succession Planning in the Non-Profit Sector

Some of the challenges that non-profit organizations experience with the development and utilization of a standard succession plan is due to the simple fact that, as an organizational entity, they are different in many ways from their for-profit counterparts. It is important for those from the for-profit sector of the business world entering into a non-profit organization not to assume that the same type of structure and governance that they are accustomed to is going to work because non-profit organizations can differ dramatically in a multitude of ways (Froelich, McKee, & Rathge, 2011; McFarlan, 1999). Addressing that issue, researchers have asserted that specific qualifications need to be established before certain business management concepts like

succession planning are applied readily to the non-profit sector (Akingbola, 2013; Newman & Wallender, 1978). Newman and Wallender (1978) indicated, "not-for-profit enterprises differ widely; each has its own managerial needs, and many have discriminating constraints that sharply modify which concepts will be effective" (p. 24).

Froelich, McKee, and Rathge (2011) concurred noting that when a nonprofit organization is held to the corporate ideal of succession planning that it is often inappropriate for their particular situation and overly burdensome to implement. They acknowledged, "To move beyond boardroom talk about the importance of succession planning, suggested activities must be realistic and consider constraints faced by many nonprofits—relatively small thinly staffed organizations with scarce resources and volunteer boards—as opposed to a more munificent corporate environment for which the elaborate succession planning models are designed" (p. 16).

Most non-profit organizations understand that succession plans are extremely important but the actual application tends to lose out to the immediate concerns of an organization such as surviving in an environment of fewer employees and attempting to address today's responsibilities instead of looking to tomorrow's plans (Amato, 2013). Non-profit senior level managers have alluded to this reality by suggesting that, when trying to survive in a very competitive global economy, the work that must be accomplished today tends to be more crucial than the planning that must be done for tomorrow (Amato, 2013).

Some would even consider succession planning a luxury in light of the various challenges and pressing needs that are being felt in these difficult and changing economic cycles (McDonald, 2008). This reality is especially evident in many non-profit

organizations who, with little to no cushion in their cash flow or monetary reserves, struggle just to survive on a day-to-day basis (Allison, 2002; Hopkins, Meyer, Shera, & Peters, 2014).

Tierney (2006) stated,

> Successful companies routinely invest enormous amounts of time and money attracting talented junior managers and developing them into leaders. Most nonprofits (even larger ones) are too small to provide meaningful career development opportunities for their employees. Most cannot afford the huge investment in recruitment and human resources that such development requires – especially when boards, funders, and donors view such expenditures as wasteful overhead (p. 30).

In the past, when developing processes and procedures to address the succession of key personnel, the tendency has been to institute theories and practices from for-profit organizations though this approach has generally been found to be inadequate due to the key differences found in non-profit organizations such as the end goals (money versus mission), the heavy reliance on volunteers, a more nebulous relationship that exist between the executive director and the Board of Directors (McFarlan, 1999; Middleton, 1987; Zhu, Wang, & Bart, 2016) and a revenue stream that is increasingly complicated due to the varied avenues from which those revenues are received (Froelich, 1999; Gronbjerg, 1993; Herman & Heimovics, 1989; Weiwei & Qiushi, 2016). It is important to realize that the structure and purpose of non-profits differ greatly from many for-profit organizations and attempting to force traditional business practices upon these institutions can be disastrous if the time is not committed to understand these various nuances (Akingbola, 2013; McFarlan, 1999).

Role of the Board

Research focused on the way in which the Board of Directors of non-profit organizations handle the transition and replacement of key personnel in their organization shows that it is typically done poorly due to a variety of factors (Allison, 2002; Masaoka & Allison, 1995). These authors identified a lack of time, inexperience with management principles specific to non-profits, a lack of understanding of the business of a particular organization, and limited skills in governing change well as reasons behind many of the ill-advised decisions that are made (Allison, 2002; Masaoka & Allison, 1995). Because of this, there is a growing concern in the way that non-profits are managing key personnel transitions; especially with so many people dependent on these enterprises (Newman & Wallender, 1978).

The Board of Directors within non-profits have the crucial responsibility of actively working to ensure that the organization's succession plan is viable and able to move the organization forward even before key personnel positions are vacated (Carman, Leland, & Wilson, 2010; Khumalo & Harris, 2008). These individuals must thoughtfully develop and institute the processes and procedures that will allow the organization to effectively address one of the most critical elements that it will face (Santora, Caro, & Sarros, 2007). Not being prepared causes a multitude of problems for an organization (Rothwell, 2011).

Boards, in general, are increasingly acknowledging the importance of a well-thought out succession plan. Yet, very few of these same organizations actually have the plans in place to guide them through the transitional process (Austin & Salkowitz, 2009; Bell, Moyers, & Wolfred, 2006; Garman & Glawe, 2004; Santora, 2004; Santora, Caro,

& Sarros, 2007). The Board of Directors tend to be in dire need of assistance in establishing effective succession planning processes and procedures thereby allowing themselves the opportunity to be more able to identify and cultivate new hires for key personnel positions (Lakey, 2007; Millesen & Lakey, 1999).

An additional challenge for the Board of Directors is that the topic of succession planning has the potential to stir up emotions and conflict amongst board members possibly leading to exacerbated power struggles and misunderstandings thereby causing open and meaningful discussion about establishing a plan that much more difficult (Gothard & Austin, 2013; Kramer, 1965). Though the consensus in the literature points to the Board of Directors being responsible for the succession planning of key personnel, the tendency has been for boards to rely on these key personnel to initiate the process themselves due to the sensitivity of the topic and the desire many times to avoid conflict and the conversation all together on the part of the Board of Directors (Bell, Moyers, & Wolfred, 2006; Dalton & Dalton, 2007; Gandossy & Verma, 2006). Yet, Axelrod (2002) believed that when board members purposefully collaborate on such a critical issue, there is an increased opportunity for a successful transition when such an event happens.

Within an organization, individuals generally appreciate that the departure of key personnel and the ensuing transitional period can be launched by a variety of circumstances such as retirements, death, a disability, termination, or organizational restructuring (Austin & Salkowitz, 2009; Cingoranelli, 2009; Dalton & Dalton, 2007a; Kesner & Sebora, 1994). Therefore, it is incumbent that the Board of Directors understand their position and realize that they "can play a significant role in establishing a proactive stance toward succession planning through internal talent development and

establishing/monitoring ongoing succession-related activities" (Froelich, McKee, & Rathge, 2011, p. 16). Regardless of the reason for the exit of key personnel, it is the responsibility of an organization's Board of Directors to be prepared and have a plan in place for both expected and unexpected departures (Gothard & Austin, 2013). And, if done well and with a lot of foresight, the utilization of a succession plan during the transition of key personnel allows the Board of Directors a multitude of decision making opportunities that positively serve the interests of both the clients and the staff of the organization as a whole (Gilmore, 1998; Wood, 2016).

Lack of Preparation

Though non-profits may not have the resources, structure and sophistication of many for-profit organizations, the installation of sound processes and procedures can help these institutions avoid the crises of management transition situations (Santora & Sarros, 2012). Though most non-profit organizations seem to be aware of this information, they still largely fail in developing an organizational structure to groom successors (Santora, Caro, & Sarros; 2007). This failure to implement such a plan, especially with the reality of a limited cushion when it comes to financial reserves or any predictable cash flow, sets non-profit organizations up for a situation in which any type of "disruption can tip the balance between 'making it' and 'falling apart'" (Allison, 2002, p. 349).

Research has shown that there tends to be a trend of apparent disconnect in non-profit organizations between how organizations view the importance of having a succession plan and the actual actions that organizations have taken toward developing and implementing a plan (Froelich, McKee, & Rathge, 2011). Though most of these organizations are aware of the human resource changes that are expected, the vast

majority of non-profits do not have a plan in place to address succession events (Ip & Jacobs, 2006) and for those non-profit organizations that do have some sort of succession plan in place, they are typically not rated very highly by the leaders in the organization with regard to their effectiveness (Bernthal & Wellins, 2006). For those that do have an understanding of some of the core concepts for successful succession planning, the evidence suggests that the current plans and processes in place for most of these non-profit organizations are simply inadequate (Ips & Jacobs, 2006; Von Bergen, 2007).

With research indicating that most non-profit organizations do not have a legitimate succession plan established, this leaves them at a higher level of vulnerability to the various changes that accompany the global economy (Garg & Weele, 2012). Information like this highlights the problem that succession planning systems that have been developed are largely failing to provide the effective leaders an organization needs to face the changes taking place (Barnett & Davis, 2008).

Yet, when done correctly, the development of a formal succession plan within the context of a non-profit organization allows for the possibility of reduced anxiety within the organization, an increased level of enthusiasm, and the opportunity to guard against selection bias during the transitional hiring process (Greer & Virick, 2008). In addition, this same plan helps to ensure that there is a higher degree of continuity in the organization's operations, the ability to address available talent, an opportunity to reexamine systems and structures, and to be able to realign various units as needed (Gersick, Stone, Desjardins, Muson, & Grady, 2000; Leibman, Bruer, & Maki, 1996).

Granted, many items tend to impede succession planning in non-profit organizations such as work/time demands, a reluctance to provoke potential

organizational politics, and intentional delays by upper management and/or the board of directors (Froelich, McKee, & Rathge, 2011) thereby enforcing the reality that most non-profit organizations have either no succession planning in place or an inadequate one at best (Ip & Jacobs, 2006). But though the changing dynamics of the global business world presents many challenges, thoughtful succession planning presents an organization with the opportunity to maximize the opportunities possible (Froelich, McKee, & Rathge, 2011).

Retention and Recruitment Issues

If one of the key elements of success in an organization is its ability to rely on efficient and stable employees, then employee retention is of critical importance and it would not make sense on the part of the organization to allow good people to leave the organization (Gurunathan & Vijayalakshmi, 2012; Gering & Conner, 2002). Yet, with an already limited pool of internal candidates in most non-profit organizations, especially community-based ones, and characteristically lower salaries, these institutions tend to experience high turnover (Santora, Caro, & Sarros, 2007). Not only is there an increased level of turnover, with the average salaries of comparable for-profit and government positions being consistently higher, it is a challenge for non-profit organizations to attract new candidates from these sectors (Tierney, 2006; Vinokur-Kaplan, 1996).

In addition, some other key challenges noted by younger professionals currently working in the non-profit sector were feelings of being undervalued by older staff, the lack of boundaries within the job, a lack of recognition, limited opportunities for advancement, and inadequate compensation (Carman, Leland, & Wilson, 2010). There was also the feeling amongst these individuals that the inclination of their non-profit

organization was to focus on funding direct programs rather than management and general administrative perceived extras which, in turn, tended to cap salaries at a lower level (Tierney, 2006; Von Bergen, 2007). Lastly, the less-experienced workers are finding the non-profit sector unappealing due to factors such as limited technology and other amenities, a task overload that compromises a healthy work-life balance, and the inability to address personal student loans due to the reality of a smaller salary (Kunreuther, 2003; Solomon & Sandahl, 2007; Von Bergen, 2007).

Other concerns expressed with regard to the lack of retention was not only the inability to replace key personnel in the future, but also the loss of knowledge and expertise when individuals retire and a transition of those skills has not been passed on (Canadian Library Association, 2005). From the vantage point of those in the non-profit educational sector, the concern was also about the inability to attract and retain the best, and sometimes only, candidate due to competition with other educational and non-educational institutions (Lacey, 2003).

The combination of the anticipated substantial number of Baby Boomers who are retiring or nearing retirement along with growing size and number of non-profit organizations is creating an impending leadership deficit (Froelich, McKee, & Rathge, 2011). But due to the unique nature of non-profit organizations, offsetting this oncoming leadership deficit will be extremely difficult especially with many of these organizations unable to cultivate their own supply of key personnel for the future (Tierney, 2006). This scenario is even more troubling for those leaders in small non-profit organizations because of the feeling of vulnerability due to the lack of backup support and the

realization that if they were to leave there would be no one there to replace them (Bell, Moyers, & Wolfred, 2006).

As a consequence of this scenario in many non-profit organizations, there needs to be a process of developing future leaders while at the same time developing and retaining current leaders (Leibman et al., 1996). Though some within senior leadership may balk at any HR effort, most of these same individuals should be able to at least realize the value of having key backups identified if the need arises through either a short-term or long-term emergency (Rothwell, 2011).

Succession planning is about identifying potential successors for all of the critical positions that exist within an organization, not just the top positions, and it requires that an organization invest in developing employee's capabilities and allow individuals the opportunity to grow and succeed (McDonald, 2008). One of the critical components for succession planning in organizations is the recognizing and purposeful development of internal personnel (Dalton & Dalton 2007; Gandossy & Verma, 2009; Greer & Virick, 2008; Groves, 2007; Jones, 2007; Lynn 2001). Those organizations that do not consciously and continually invest in the development of their future leaders open themselves up to the possibility of experiencing consequences that are both short-term and long-term (Jones, 2007).

The development and retention of key personnel requires a commitment on the part of the organization and support from those serving in the capacity of external stakeholders (Gothard & Austin, 2013). The utilization of existing leadership to identify, mentor, and effectively supervise potential successors can help to lead to a lower turnover rate (Austin & Salkowitz, 2009; Beeson, 1998; Cingoranellí, 2009; Greer & Virick, 2008;

Groves, 2007; Herrera, 2002; Jones, 2007). In addition, the establishment of peer support coupled with a feedback structure serves as a critical process for the development of a future successor's professional skills and ability to perform through on-the-job learning (Austin & Salkowitz, 2009). Lastly, in an environment where internal successors are preferred, non-profit organizations would do well to utilize annual performance reviews to identify potential internal candidates and then deliberately delegate select projects through which these employees can develop (Froelich, McKee, & Rathge, 2011). The end result for the succession plan is its ability to perpetuate the enterprise by ensuring that the pipeline of talent is filled with individuals who are high-performing thereby allowing for an abundance of these individuals from which to utilize at all key levels of the organization regardless whether the organization is for-profit or non-profit (Charan, Drotter, & Noel, 2001).

National research has consistently shown though that there are those individuals who do gravitate toward the non-profit sector out of a belief in the importance of the work that particular organization is doing (Cryer, 2004; Light, 2002). Therefore, Tierney (2006) stated that it is important for non-profits to "work on retaining their best leaders, providing them with opportunities for career development and advancement, both within individual organizations and across the sector" (p. 28).

The changing demographics of the global economy present a serious set of obstacles for the non-profit sector (Carman, Leland, & Wilson, 2010). With regard to retention and recruitment, non-profit organizations are faced with the reality that the age of most of their key personnel are over 50 and nearing retirement, a majority of these individuals have expressed an interest in leaving their position in the next five years,

board members are typically inexperienced at hiring new personnel, and the organization fails to understand the cost of a poor hire when they do not invest the time, energy, and resources needed to make a successful hire during times of transition (Allison, 2002; Carman, Leland, & Wilson, 2010).

In addition, Froelich, McKee, and Rathge (2011) noted that attempts to find successors to fill the key roles vacated in an organization tends to be more difficult in the non-profit sector due to apparent shortages of experienced personnel in the job market (Allison, 2002; Tierney, 2006), traditionally lower salaries, flatter or lack of an organizational infrastructure, an increasingly demanding set of requirements for executives (Tierney, 2006; Von Bergen, 2007), and varied issues that make positions in key areas less appealing to the upcoming Generation X and Y leaders (Kunreuther, 2003; Von Bergen, 2007).

The institution of succession planning processes and procedures can easily turn into a bureaucratic nightmare as opposed to an effective identification and development process (Froelich, McKee, & Rathge, 2011). However, when effectively done succession plans have been associated with smoother transitions due to higher organizational performance (Friedman, 1986; Giambatista, Rowe, & Riaz, 2005). The struggle though for non-profit organizations in developing an effective succession planning, especially smaller organizations, is both the real and perceived lack of resources (monetary, time, expertise), traditionally thinner ranks in internal talent, and fewer opportunities for grooming successors (Ip & Jacobs, 2006).

Thus, noting the various struggles that non-profit organizations encounter with regard to addressing the need for and the actual establishment of a succession plan, five

general challenges emerged: the reality that non-profit organizations are uniquely different than for-profit organizations, the specific role of the board, the struggle to effectively fill vacated positions permanently, the large number of non-profit organizations that are not prepared for key personnel transitions, and, the inability to recruit and retain the right people.

In summary, most non-profits have their own unique set of challenges when it comes to devising and implementing a succession plan that tends to revolve around both the perceived and actual lack of resources such as money, time, and expertise, as well as, limited options in regards to internal talent and the lack of opportunity to groom possible replacements. (Froelich, McKee, & Rathge, 2011; Ip & Jacobs, 2006). Yet, though they may not have the resources, structures, or sophistication of many for-profit organizations, Santora and Sarros (2012) believed that non-profit organizations could avoid many institutional crises of key personnel transition situations by committing to instituting sound processes and procedures. Many non-profit organizations are to some degree aware of this, however, they still largely fail to develop the organizational structure within a succession plan needed to groom successors and thereby successfully managing these periods of key personnel transitions (Santora, Caro, & Sarros, 2007).

Regardless of type of organization, and despite the challenges associated with succession planning, succession planning is broadly designed to "… ensure the continued effective performance of an organization, division, department or work group by making provision for the development, replacement and strategic application of key people over time" (Rothwell & Poduch, 2004, p. 406). Within these sophisticated elements of a succession plan though, there is a need to also have in place a simpler process to quickly

fill vacated positions and to maintain a degree of organizational continuity while the more advanced processes of the succession plan are taking place (Rothwell, 2011; Rothwell & Corby, 2012). This process is called replacement planning.

Replacement Planning

Rothwell (2011) defined replacement planning as "the process of identifying short-term and long-term emergency backups to fill critical positions or to take the place of critical people" (p. 88). He divided replacement planning into short-term replacement planning which focuses on situations where key people are on vacation or sick and then long-term replacement planning situations in which a key position needs to be filled due to an unexpected death, disability, resignation, or other circumstance in which the position could be vacant for an extended or indefinite period of time if not filled (Rothwell, 2011).

Unexpected situations in organizations that affect key personnel, such as when a top executive suddenly dies or leaves the company, are critical moments in the life of the organization (Mooney, Semadeni, & Kesner, 2013). The development of a replacement plan within the greater context of a succession plan allows the organization to have an established process to identify those possible backups that can be utilized to assume various responsibilities during a time of vacancy; especially if the vacancy occurs unexpectedly (Rothwell, 2011). Such a plan allows the organization to be prepared for and maintain “a long-term perspective about this short-term leadership matter" (Mooney, Semadeni, & Kesner, 2013, p. 629).

Many organizations are becoming more and more aware of the importance of having some kind of emergency/replacement plan in place (Behan, 2007). With an

effective replacement plan established, an organization is able to make sure that the work that needs to be done is done even though the individual who normally does it is not present (Rothwell & Corby, 2012). Additionally, more than just finding an individual in the organization to fill the vacated position (Rothwell, 2011), replacement planning serves as risk management for an organization and is developed from the realization that for an organization to survive it needs to be prepared to have the right person to fill the right job at the right time (Lacey, 2003).

Within this process of preparing for times of personnel vacancy, especially during situations when the vacancy is sudden and/or unexpected, the organization has to make a determination from where the individuals utilized to fill those vacated positions are going to come from. The utilization of individuals, interims, to fill those vacated positions can come from two sources: internal or external (Garg & Weele, 2012).

Determining Internal or External

Utilizing an interim to fill a vacated position as part of a replacement plan within the larger context of a succession plan allows an organization to reduce time constraints in selecting the permanent successor for the vacated position which in turn allows for better decision making as a variety of alternatives can be assessed (Intintoli, Zhang, & Davidson, 2014; Simon, 1997). Yet, the utilization of an interim means a decision must be made on whether this individual will be moved from a position internally or brought in from the outside (Ballinger & Marcel, 2010; Garg & Weele, 2012). Either of these options have both strengths and weaknesses that must be considered when an organization is making a decision to fill a vacated position until a permanent successor is hired (Intintoli et al., 2014).

With the consideration of using an interim from within the organization, Sinkin and Putney (2009) noted that internal succession is generally preferred by organizations because of the sense of control felt by the organization. In addition, "insider successions have typically been found to be less disruptive and less likely to lead to a deterioration in performance than outsider succession" (Worrell & Davidson III, 1987, p. 510).

Other research has shown that "beyond worst-case disaster planning, there is some indication that internal succession tends to be viewed more favorably by external stakeholders, at least for organizations considered to be performing acceptably" (Garman & Glawe, 2004, p. 121). Garg and Weele (2012) noted that organizations should truly look inward to see what potential and undiscovered capabilities and talents are present that could lead to future success. With the proper investment in the development of potential interims as part of an overall succession plan, these attributes tend to become more apparent (Seymour, 2008).

On the other hand, while organizations may want to utilize someone internally to temporarily fill a vacated position, this goal is often unachievable because organizations often do not have the human resources available internally and/or they do not have adequate processes in place to make those resources a reality (Sinkin & Putney, 2009). While there may be many positive benefits to using internal interim replacements as part of a succession plan, organizations are increasing the hiring of external interims because they present the needed skills not found in the organization (Russam, 2013).

Furthermore, research in such areas as the United Kingdom has shown that more and more organizations are bringing in specialists from the outside, especially when the focus for the future is change management or business transformation (Russam, 2013).

By bringing external temporary talent into the organization there is a sense that the organization will be able to meet and adjust to the changing demands of the market and bring a fresh insight to the company even though such hiring tends to be expensive and to some degree unproven (Garg & Weele, 2012; Seymour, 2008).

Though outsiders typically tend to be viewed as change agents by those on the boards of organizations (Santora, Caro, & Sarros; 2007), Santora (2005) highlighted that, "Too often, boards believe that appointing an outsider gives the organization a certain aura and that outsiders bring something magical with them" (p. 27). This element of change and fresh insight from hiring an external interim has to be compared against the intimate knowledge and operational understanding of an organization that an internal interim provides if used (Santora, Caro, & Sarros; 2007).

For non-profit organizations in particular, the literature has shown that though it may not be their preference, most of these institutions are forced to hire someone externally to fill that position (Santora, Caro, & Sarros, 2007). For-profit organizations show a 60-65% higher rate of senior management internally while non-profits tend to be around the 30-40% range (Tierney, 2006). Some authors believed that the reason for this is that non-profit organizations tend to be flatter and less able to hire the talent they need from within the company (Bowen, 1994; Bozer, Kuna, & Santora, 2015). Froelich, McKee, and Rathge (2011) concurred with this by noting that due to the small size of most non-profit organizations they are seldom able to produce an adequate number of qualified internal candidates able to fill the role vacated by key personnel.

Additionally, with regard to utilizing an interim to fill a vacated top executive position within a non-profit organization, the organization generally does not embrace an

external hire because of their desire to maintain and protect organizational values (Froelich, McKee, & Rathge, 2011; Selznick, 1957). With that noted though, over the next five years the number of higher level personnel in non-profit organizations that plan to retire is 70 percent with many of the individuals next in line to assume the position having no interest in the position or are planning to retire as well (Carman, Leland, & Wilson, 2010; Crocker, 2007).

Regardless though of whether an individual is utilized internally or hired externally, these interims are critical for the ongoing operations of the organizations and not having them during a time of transition between the permanent placeholders can be considered reckless for an organization (Kusserow & Boateng, 2015). Rothwell (2011) noted that:

> because time has become a strategic resource, organizations cannot afford the delays in decisions that may result when decision makers are absent," therefore the utilization of an interim, whether internally or externally, allows an organization to meet their basic requirements while giving themselves additional time to do a proper search (p. 89).

So who are these individuals, the interims, who are so critical to the ongoing operations of an organization?

Interims

Interims, as the name implies, are temporary replacements that fill the void in a vacated position so as to allow daily operations to continue within an organization (Henschel, 2011). They are the individuals who are utilized during a transitional period in an organization to fill the gap between the departed predecessor and the eventual successor (Ballinger & Marcel, 2010; Intintoli et al., 2014).

The unique setting and the various characteristics associated with the position of an interim tends to place interims within the categories of nonstandard work arrangements (Kalleberg, 2000), non-standard forms of employment (Bruns & Kabst, 2005), short-term hires (Davis-Blake & Uzzi, 1993; Houseman, 1997), and/or temporary work arrangements (Browning & McNamee, 2012). They are typically seen as outsiders used for the short-term (Inkson et al., 2001). Browning and McNamee (2012) stated that the "prevailing literature on temps depicts them as external hires who often are isolated, caught between authority lines, lacking organizational identification, and temping as a means of obtaining needed income, personal flexibility, or a bridge to the permanent position" (p. 733). Interims are also widely used internally which tends to violate many of the earlier assumptions made about these individuals even though that vantage point in the extant literature is rarely considered (Browning & McNamee, 2012).

Organizational attitudes and perceptions have changed quite markedly over the years as organizations are becoming more aware of the benefits that these individuals can deliver thereby leading to richer discussion and exploration into the possibilities that exist in regards to interims (Russam, 1996). For example, research has shown that organizations are utilizing interims anywhere from 18% to 20% of the time to fill a vacated position during a period of personnel transition (Ballinger & Marcel, 2010). This utilization of interims to fill key positions, especially during the case of an emergency situation where a position has been vacated unexpectedly, has become an accepted practice by most industry and succession experts (Mooney, Semadeni, & Kesner, 2012). Interims play a pivotal role within the overall succession plan of an organization because the environment into which they enter is less than ideal and their role during a transition

has far reaching implications for the organization as a whole (Browning & Boys, 2015; Browning & McNamee, 2012).

Yet, even with the increased use of interims within organizations, the existing literature with regard to interims and the effective management of them has mostly been relegated to practitioner press as recycled extracts that have been garnered from various reports and interviews from consultancy proponents (Goss & Bridson, 1998). In addition, the extant leadership literature tends to neglect interims utilized internally, their perception of the role they have been asked to fill, how they approach their role, their experience within that position, and the overall impact their role had on the organization as a whole (Browning & McNamee, 2012).

With the growth in the utilization of interims, it is important to realize that the use of temporary individuals in key positions poses challenges and consequences for both the employee and the organization (Browning & McNamee, 2012). That being said, organizations are more frequently opening themselves up to the idea that, in certain scenarios, the use of an interim is a viable succession option that allows the organization to better establish a long-term plan (Mooney, Semadeni, & Kesner, 2013).

Role of the Interim

Along with addressing who interims are and where they are acquired from (internal or external), the particular role that an interim will undertake during a vacancy is another consideration as part of an overall succession plan. Mooney, Semadeni, and Kesner (2012) identified six possible roles that organizations utilize interims in: the seat warmer, the contender, the groomer, the marketer, the fixer, and the cleaner (p. 14). Therefore, depending on the specific needs of the organization at the time of a vacancy,

interims can be used for a variety of purposes which might range from serving to groom the permanent successor to ensuring that the organization does not go out of business (Mooney, Semadeni, & Kesner; 2012).

Interims also serve an important role by filling a critical position thereby allowing an organization additional time to find the best permanent replacement for the position vacated by the previous employee (Mooney, Semadeni, & Kesner, 2012). This additional time often provides organizations with the opportunity to more thoroughly search for the appropriate successor with the skill set and talents that the organization needs (Hymowitz, 2006). Therefore, in theory, by appointing an interim, those in the organization who are making the permanent hire have the opportunity to improve their decision making by alleviating the time constraints that prevent them from assessing a number of alternatives (Bell, Raiffa, & Tversky, 1988; Simon, 1997).

Santora and Sarros (2012) suggested that "an interim may be a perfect short term solution for the organization and give a board ample time to find a suitable or even an ideal replacement" (p. 10). But, they also acknowledged that "such an arrangement may place the organization in a state of limbo, losing valuable organizational opportunities" (Santora & Sarros, 2012, p. 10). Mooney, Semadeni, and Kesner (2012) concurred noting that the longer an interim is utilized for filling a vacancy, the greater the lack of clarity on the part of employees trying to advance their careers, which may then lead to potential internal losses. Chapman et al. (1988) indicated that "excessive interim periods can lead to compromises in institutional planning and to institutional fragmentation" (p. 83).

The use of an interim is often a necessary part of the strategic management actions connected with a succession plan. However, the organization needs to focus its attention on those individuals who will permanently take over these vacated positions (Mooney, Semadeni, & Kesner; 2012). Researchers believed that having an individual serving in the interim role for more than six months can be unhealthy (Wolfred, 2005). When an organization is determining the specific role in which it will be utilizing an interim based on the overall needs and strategic goals of the organization, it must also consider the longevity of the interim position (Mooney, Semadeni, & Kesner, 2012). Therefore, whether an interim has taken on the role of filling in for an associate that is on a temporary leave, such as maternity leave, or managing the key decisions of an organization going through major changes (Goss & Bridson, 1998), organizational leaders should be clear with the interim and the employees at large with their decision and expectations. Such explicit communications may then allow the interim the opportunity to fulfill his/her charge (Nugent, 2011).

The Vantage Point of the Interim

From the perspective of the organization, interims, in general, provide an organization with the necessary time to reflect on their next steps of the succession process, thereby ensuring that the successor of a vacated position has a better opportunity to succeed (Nugent, 2011). Yet, how do the actual interims view their position and purpose and what challenges does their perspective bring to the succession plan as a whole? The purpose for being utilized as an interim may be due to the fact that there had been a hasty departure of a key employee within the organization, or, that the current search for a successor is providing the right person. It might also be that a time of

healing is needed because the actions of the previous leader was egregious (Nugent, 2011).

Ultimately, the decision then to hire an interim is usually made under a degree of duress especially when the position is vacated either unexpectedly or for reasons of immediacy (Ballinger & Marcel, 2010). Regardless of what role interims assume upon filling their position, most realize that they are serving in potentially "tension-filled, volatile periods of transition, and thus their adjustment to, and performance in, the interim role likely has critical implications for their organizations at large" (Browning & McNamee, 2012, p. 730).

A question surrounding interims is how do "members with newfound but temporary power perceive their unique circumstances, and perhaps more importantly, how personal attributes and organizational dynamics shape their perceptions and subsequent actions" (Browning & McNamee, 2012, p. 731). Interims will come into their temporary position with a wide variation in approach with some acting in an assertive or aggressive fashion while others tend to be more passive and focused on maintaining the status quo (Browning & McNamee, 2012; Mugits, 2011). Therefore, Chapman et al. (1988) believed that it is critical for an interim to clarify with the organizational leaders what the expectations are for him/her, to know his/her specific responsibilities, and to establish what authority he/she truly has in his/her new role. Is the interim's role that of a "seat warmer," change agent, or something else during the interim's tenure (Mooney, Semadeni, & Kesner; 2012; Nugent, 2011). Interims are "greatly aided by having a clear, strategic direction" (Hall, 1995, p. 89).

Along with the roles that interims assume within their new position, is the reason why they accepted the position in the first place. Goler (2003) has noted some of the reasons that those who accepted the interim position did so was because they felt that it was an opportunity to gain more experience, would serve as a stepping-stone in their career advancement, or it provided additional compensation. In the instances of an abrupt vacancy, the interims might feel that they can possibly serve to smooth the transition process within the organization from the previous leader to the new and permanent leader (Mooney, Semadeni, & Kesner, 2013).

Specifically from the vantage point of interims utilized internally, some of these individuals feel compelled to assume the vacated position on a temporary basis because they know there are no viable candidates currently available (Ballinger & Marcel, 2010). Due to the fact that a relationship already exists between employees and their organization, the feeling of obligation to fill the vacated position may serve as the main motivation why certain individuals assume interim roles (Browning & McNamee, 2012; Ballinger & Marcel, 2010).

In addition, due to the temporary nature interims are thrust into, it is important at the beginning of the interim's tenure that they seek a clear understanding as to whether or not they can be a candidate for the permanent position (Hall, 1995). Knowledge to this point has the potential to eliminate a possible source of uncertainty and stress in an already unsettled time in the life of the organization and the employee (Gilmore, 1988). Interims must be aware that, regardless of how they are utilized in an organization, their filling of a vacant position does not necessarily guarantee that they are offered the job permanently. Instead, the utilization of interims means that they meet the minimum

requirements necessary to serve in the acting capacity of the vacated position until a proper search is done and the permanent person is installed (Rothwell, 2011).

Internal Interims

With the foundational elements of succession planning outlined, as well as, an overview of those who are utilized to facilitate those plans, a further examination of those employees who are hired internally to fill a vacated position is explored next. Although internal interims are widely used in organizations today, current literature on temporary employees and temporary work arrangements has generally failed to examine the employees who fill an open position, interims, and are already members of the organizations that are doing the hiring (Browning & McNamee, 2012).

For example, Inkson et al. (2001) utilized four categories to delineate different types of employment and placed interim leaders in their temps/contractors category. They sectioned and defined them as “short-term outsiders” (p. 261). Langevin and Koenig (2004) only briefly referred to internal interims, addressing them as nothing more than temporary acting leaders, and encouraged those practitioners who are hiring to look externally to fill their temporary leadership positions. Therefore, for the purpose of defining this group of employees, Browning and McNamee (2012) succinctly stated that as the name suggests, "internal interims are hired internally from within the organization" (p. 730).

Part of the reason for the lack of interest in internal interims is that some believe that the use of internal candidates to fill a vacated role in the organization is disruptive. Further, it may force those with this newly given authority to be further alienated from those groups from which they were excluded from in the first place (Grusky, 1960). In

addition, there is the question of the legitimacy of an internal interim with regard to dealing with rivals that are already established in the organization (Grusky, 1960; Marcel, Cowen, & Ballinger, 2017).

There is a sentiment among researchers that internal interims should not do anything except fill the gap that has arisen through a position vacancy and to maintain the organization's status quo (Altman, 1996; McKinney, 1992; Oates, 1990). In other words, interims should perform their new inherited jobs in a passive fashion and assume the role of caretakers (Associated Press, 2011; Mugits, 2011).

In contrast, other researchers believe that the internal interim is the most suited to fill a vacancy position because of his/her influence and identity that is established through his/her existing relationship with the organization (Browning & McNamee, 2012). The internal interim may have the potential, if utilized in a transformational context, to help an organization to get beyond its problems and help it in setting a new course (Browning & McNamee, 2012; Burns, 1978).

Industry and succession planning experts more fully understand the nature of uncontrollable emergencies in today's global economic climate and therefore tend to label the hiring of an internal interim simply as a "Plan B" (Mooney, Semadeni, & Kesner; 2012). This occurrence is one that is currently being utilized with an increased frequency within various industries (Ballinger & Marcel, 2010). Evidence is suggesting that those "Plan B" options are being used more often in the utilization of interims as a formal part of succession plans even though it is still unclear if this is a good option for an organization or a sign of failed succession planning (Mooney, Semadeni, & Kesner; 2012).

As research continues to examine the advantages and disadvantages of utilizing an internal interim as part of a succession plan, the limited literature does point to the notion that internal interims tend to violate many of the assumptions that are made about them (Browning & McNamee, 2012). Part of the reason for this is a lack of understanding of the motivation behind why these employees decided to take on interim roles.

Goss and Bridson (1998) identified some of these motivating factors, such as not having a choice whether or not to accept the position, being ambivalent and considering this position their best option for right now, or because of the possibilities that the interim position possess (p. 40). It seems though, with most employees who take on the role of internal interim, they have hopes that the role will segue into a permanent position (Brophy, 2006; Gossett, 2001; Rogers, 1995). Aspirations on the part of internal interims in obtaining the position that they are filling on a permanent basis has been cited often in temporary and leadership literatures as a significant motivating factor (Browning & McNamee, 2012).

What are some other reasons and/or motivational factors that encourage internal interims to assume the position in the first place? Research has shown that some of the internal interims felt compelled to assume the vacated position on a temporary basis because they know there are no viable candidates currently available (Ballinger & Marcel, 2010). This is an especially difficult quandary for smaller organizations, most notably non-profits, where they have individuals who feel obliged to serve in a particular role for an extended duration because there are not any replacements available (Richtermeyer, 2011). Although some internal interims may desire to eventually

transition into the role permanently if the opportunity exists, others tend to assume their role for a variety of reasons such as the perception that they have no choice or volition in the matter (Aletraris, 2010; Browning & McNamee, 2012).

Other research stated that, due to the fact that a relationship already exists between an employee and his/her organization, the feeling of obligation of assuming the role of interim without the ability to obtain the role permanently may serve as the main motivation why certain individuals assume the role of internal interim (Ballinger & Marcel, 2010; Browning & McNamee, 2012). They may feel obligated to forego the status they currently have to serve in the temporary position for the good of the organization and/or their own personal legacy (Ballinger & Marcel, 2010).

What happens, though, when these internal interims do not obtain the position on a permanent basis? The limited literature that does exist on this topic tends to warn organizations not to allow those serving in internal interim positions to be able to obtain those positions on a permanent basis with the reason being that the role of the interim is designed to prepare the position for the new person that will be hired (Browning & McNamee, 2012; Chapman & Vogelsang, 2005; Langevin & Koenig, 2004). Yet, if these internal interims are not eventually hired to fill the vacated position on a permanent basis they may decide to leave the organization thereby causing a substantial brain drain within the organization (Santora, 2005). The problem is that there has been very little research done to acknowledge the additional losses associated with internal candidates who thought or hoped that they were the heir apparent but left the organization after discovering that they were no longer contenders for the leadership position (Santora, Caro, & Sarros, 2007). These "second wave" departures, as termed by Goler (2001, p.

393), are often the consequence of the board of directors' decisions to hire someone other than the interim and tend to make up nearly half of all internal interims' departures from the organization (Farquhar, 1991; Goler, 2001).

It is important to note that interims are not impervious to the various difficulties that arise from the traumatic periods of transitions especially when considering the fact that an individual is moved literally overnight into a situation that causes changes to collegial relationships and adds a new set of professional judgments placed upon the employee (Goler, 2001; Maynard, Resick, Cunningham, & DiRezo, 2017). In addition, interims also have their own perceptions of their career progression prospects based on their serving as an interim within an organization (Seymour, 2008). Seymour (2008) acknowledged that interims "will obviously be prepared to make a deeper commitment to an enterprise which demonstrably invests in them and their route to achieving their personal ambitions, perhaps through promotion" (p. 38).

Additionally, the way internal interims process the role-related interactions they encounter impacts not only the perception of their role as an interim but also has an effect on their personal and professional identity (Browning & McNamee, 2012). Goss and Bridson (1998) noted that the temporary role of interims "has implications for individuals and their attempts to maintain identity and livelihood in late modern society, but also for organizations employing them" (p. 48).

The Use of Interims in General and Internal Interims in Particular in the Non-Profit Religious Sector

The utilization of interims to fill vacated positions is becoming more of an accepted practice by industry experts who have estimated the usage of interims at 18-

20% of the time there is a transitional period of key personnel within an organization (Ballinger & Marcel, 2010; Mooney, Semadeni, & Kesner; 2012). As the use of interims is becoming a more standard component to a long-term succession plan, organizations are also realizing that there is a myriad of challenges and consequences that face both the interims and organizations during these periods of transition (Browning & McNamee, 2012; Mooney, Semadeni, & Kesner, 2013). Yet, the literature that currently exists on the unique position of interims and how to manage these individuals has been scarce, though there is a marked change in how organizations perceive these individuals and the potential benefits they can deliver (Browning & McNamee, 2012; Goss & Bridson, 1998; Russam, 1996).

Interims, especially internal interims, are of great importance because of their specific role within the transitional phase of a succession plan of a non-profit organization (Santora, 2005). These individuals tend to have a much more active role in the transition phase than the title interim might actually imply (Hall, 1995). The critical nature of interims is especially evident in the various challenges that arise during leadership transitions in religious organizations (Dollhopf, 2013).

Religious institutions, though considered some of the longest-living organizations in the world, are beset by a multitude of challenges and limitations in today's global economic environment (Ershova & Hermelink, 2012; Fritz & Ibrahim, 2010). One of those unique challenges is that during a period of transition of key personnel, the interim is not simply filling a vacated position, he/she is likely stepping into a position of spiritual leadership in which they might be called upon to serve as a confidant, officiant,

counselor, mentor, or some other role that plays an important part in the lives of others (Dollhopf, 2013).

Another issue that religious organizations are experiencing during times of key personnel transition is the growing diversity and increasing independence of congregations (Weese & Crabtree, 2004). In core areas where there traditionally was a high degree of homogeneity with regard to composition and function, congregations are more often departing from denominational norms thereby causing a greater degree of uncertainty during transition periods (Dollhopf, 2013; Weese & Crabtree, 2004).

Watkins (2003) noted, "transitions are critical times when small differences in your actions can have disproportionate impacts on your results" (xi). Dollhopf (2013) added, "Times of leadership transition for organizations, including congregations, are not only disruptive but are crucial moments for establishing organizational direction, roles, and identities for both the organization and the new leader" (p. 676). Lastly, Jethani (2005) concurred stating, "Planning ahead for succession matters … How well a church plans for leadership transition may determine its long-term health" (p. 51).

During these periods of key personnel transition in religious organizations there is an opportunity for these organizations to grow and develop if the appropriate time and commitment is given to the succession (Mead, 2012). Addressing the challenges that face religious organizations during these times of personnel transition, many of these organizations are refocusing on the development of internal leadership and are more frequently using interim ministers/pastors to fill the vacated position on a short-term basis while the congregation engages in a search for the permanent minister/pastor (Dollhopf, 2013; Weese & Crabtree, 2004).

The utilization of interims, whether internal or external, poses important considerations to the deliberation process of a congregation (Jethani, 2005). The congregation must assess aspects such as how an interim will impact the organization's stability and the potential conflict if an internal interim is used then later moved back to their former position (Iannaccone & Everton, 2004; Rolfe, 2006). These individuals do not need to be "game changers" for the organization, but the proper interim will have the skills and abilities needed to move the organization in the right direction (Ryan, 2015). Yet, with the multitude of challenges that religious organizations encounter during the transitional period of key personnel, these organizations have garnered very little attention in the "social scientific study of religion" (Dollhopf, 2013, p. 676).

Ultimately, internal interims both in the for-profit and non-profit sectors are often placed in the midst of unique positions and situations for a variety of reasons and with a multitude of possible outcomes. It is vital that researchers and practitioners more fully understand the processes that these individuals work through both during their tenure as interims and afterwards. Therefore, scholars suggest that employing sensemaking theory as a focal construct can be extremely useful in this regard (Browning & McNamee, 2012).

Sensemaking

Bogner and Barr (2000) stated, "Cognitive scientists suggest that how individuals make sense of and act within their environments is tied to their cognitive frameworks or mental models...The development of these frameworks is path dependent; as individuals interact with their environments and build cognitive frameworks, they use those frameworks to make sense of future interactions. Thus, the past shapes the template for

understanding the future" (p. 213). Weick (2005) added, "Viewed as a significant process of organizing, sensemaking unfolds as a sequence in which people concerned with identity in the social context of other actors engage ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less order into those ongoing circumstances" (p. 409).

In the past, scholars have utilized a variety of theories such as social exchange, social capital, uncertainty reduction, and social comparison to predict the behaviors that temporary workers exhibit during and after their participation in a contingent role (Browning & McNamee, 2012; Connelly & Gallagher, 2004). With a sensemaking framework, there is a focus on "how internal interim leaders perceive and enact their roles based on their perceptions" (Browning & McNamee, 2012, p. 733). Therefore, from the vantage point of sensemaking, individuals will retrospectively construct meaning to actions they have already engaged in (Browning & McNamee, 2012; Weick, 1995, 2001).

Research has discovered that the sensemaking processes of participants' shapes their actions and their enacted environment in a meaningful way (Weick, 2001; Weick et al., 2005). Along with the sensemaking is the influence of prior experiences and personal choices that impact the ways internal interims process their temporary role, as well as, how they will respond when moved back to their former position (Browning & McNamee, 2012). Sensemaking then becomes that effort on the part of individuals to work through their feelings as they process this transition period (Hall, 1995).

A key dimension of sensemaking is the concern on the part of many workers in the temporary position pertaining to the actual degree of choice that they were given in initially assuming the vacated position (Browning & McNamee, 2012). Some

researchers believe that an employee's behavior is influenced to some degree by the particular values that were prevalent in society when they entered the workforce thereby giving societal situations and related phenomenon need for consideration (Guest, 1984; Jurkiewicz, 2000).

Another concern for those in the interim position was making sense of the perceived stigmatization that came with the occupying of the temporary role (Browning & McNamee, 2012). The effect that this segment of succession planning has on interims given their particular role and responsibility during a period of stress and uncertainty needs to be considered (Goss & Bridson, 1998). An organization's environment will serve as a self-fulfilling prophecy for an interims established mental models and social interactions (Weick, 1969; Weick et al., 2005).

In general, existing literature tends to be lacking when it comes to delving into the various negative relational experiences that internal interims encounter during their tenure as an interim (Browning & McNamee, 2012). Browning and McNamee (2012) stated, "Rather than simply documenting their actions, a sensemaking perspective helps us to understand why internal interims potentially adopt different role-related actions that may ultimately have sweeping implications for their organizations" (p. 733).

With a wide berth of considerations in motion for internal interims, the question then largely becomes how do "members with newfound but temporary power perceive their unique circumstances, and perhaps more importantly, how personal attributes and organizational dynamics shape their perceptions and subsequent actions (Browning & McNamee, 2012, p. 731)?" The issue then arises that "… internal interims are still largely neglected in scholarly and trade publications, and hence we know little about their

potentially unique experiences and approaches to temporary leader positions" (Browning & McNamee, 2012, p. 730).

Summary of the Chapter

This chapter began by providing the background and need for succession planning especially in light of an ever changing global economic environment. Succession planning was defined along with an articulation of why succession planning is deemed important. In addressing the overall importance of succession planning, Ahmadi, Ahmadi, and Abbaspalangi (2012) summed it up well:

Our failure to attend to the succession planning will lead to more limited structures and opportunities for succession development. On its part a more limited organization will face more difficulties in finding alternative workforce leading to more limited budget resources. And the more limited budget resources will encourage the active leaders within the organization become absent from their post and leading to their failure to attend to the highly-skilled and high potential employees. ("Talent Management and Succession Planning," p. 218).

Then, the components that comprise well devised succession planning processes and procedures were addressed along with the specific challenges that are associated with establishing and maintaining an effective succession plan.

The chapter then transitioned into the unique role of succession planning within non-profit organizations. Non-profit organizations were defined and discussed from a historical perspective. The development of succession planning within non-profit organizations was addressed along with the specific challenges that these organizations

encounter in the development and implementation of effective succession planning processes and procedures.

Due to the nature of personnel transition, the utilization of replacement planning within the larger framework on succession planning was explored. As part of replacement planning, and ultimately an organization's succession plan, the decision processes associated with determining if an internal or external replacement was presented.

With the need to consider replacement planning to address the vacated position within the organization, the chapter then introduced the role of the interim, the unique vantage point of the interim, and the specific dynamics that impact the interim, particularly the internal interim, and the specific utilization of interims in the non-profit religious sector. Interims are a critical component of any succession plan and they are becoming a staple in many different industries (Ballinger & Marcel, 2010; Mundt, 2004). With this increase in the utilization of interims it is important to not only know who they are but there is a "… need for greater clarity about roles and terms of office" (Hall, 1995, p. 88).

Lastly, because of the growing use of interims, a lack of clarity of their actual role within the transitional process, and the limited and sometimes negative literature with regard to their overall purpose, these individuals are increasingly likely to engage in a systematic cognitive processing of the situation called sensemaking due to their perception of an adverse employment relationship (Chaudhry et al., 2009; Louis & Sutton, 1991). Therefore, a deeper examination of the role of sensemaking was explored to expose some of the unique psychological processes that interims, and particularly

internal interims, go through in their accepting, working in, and eventual departure from the interim position.

Board members and upper level management of an organization have a crucial role in ensuring that successful succession planning practices and procedures are in place with regard to the recruiting and development of future leadership (Dalton & Dalton, 2007; Giambatista, Rowe, & Riaz, 2005; Tierney, 2006). Being able to establish purposeful strategies and goals connected to the harnessing of skilled talent is the key to succession planning success in a challenging environment that is increasingly becoming more global, virtual, and changing (Galagan, 2010).

Therefore, the use of internal interims on a temporary basis may thus provide developmental opportunities as well as a sufficient timeframe for identifying permanent candidates to fill such positions. Yet, research on internal interims within the non-profit sector is currently limited, particularly with regard to the sensemaking experiences of such interims. Therefore, examining the experiences of internal interims in a religious context through the lens of sensemaking may serve as a fruitful contribution to the currently limited literature on interims in the non-profit sector.

Chapter 3 – Design and Methods

Introduction

This chapter presents the purpose of the study and the research question guiding the study. It then provides an overview of the pilot study and its influence on the main study design, followed by a discussion of the design of the main study. Next, the research context of the study, a protestant denomination, is discussed along with the role of the researcher. The sample selection strategy and criteria are provided. The approaches for data collection, data collection procedures and data analysis are described, followed by an articulation of how issues associated with reliability and validity from a qualitative perspective were addressed in this study. Then, the limitations associated with the study are presented, followed by a summary of the chapter.

Purpose of the Study

The purpose of this study was to explore how internal interims perceive and process their interim experiences both during and after serving in that capacity.

Research Question Guiding the Study

This study was guided by the following research question:

How do internal interims perceive and process their interim experiences both during and after serving in a transitional period within their respective organizations?

Overview of and Influence of the Pilot Study on the Main Study Design

A small scale pilot study consisting of two associate pastors, who had previously served as internal interims within their respective congregations, was conducted in the Spring, 2016 semester. Approval was sought and obtained by the Institutional Review Board (IRB) of The University of Texas at Tyler to conduct the pilot study under the

direction of Drs. Andrea D. Ellinger and Rochell McWhorter, the co-chairs of the dissertation and methodologists.

The purpose of the pilot study was to assess the feasibility of the design of the study by ensuring that participants for the study could be obtained, data collection procedures and analysis were appropriate, and to examine the clarity and utility of the questions on the interview protocol (Baker, 1994; Chenail, 2009; Polit et al., 2001). By conducting the pilot study, the researcher was able to gather and analyze data from a smaller sample size which allowed for the opportunity to address potential biases, make adjustments on the method utilized, and adapt the interview protocol for the study (Chenail, 2009; van Teijlingen & Hundley, 2001).

The two associate pastors were purposefully selected using a criterion purposeful selection process. Specifically, the researcher was looking for associate pastors who had served as internal interims within congregations within the past 8 years and had not received the positions of senior pastors on a permanent basis. To locate potential participants, the researcher contacted 35 of the denomination's organizational leaders by email due to the fact they would have knowledge of participants who would meet the necessary criteria. From these 35 emails, 19 of the individuals responded leading to 14 names being acquired. All 14 pastors were contacted by email and 2 responded that they would participate; and, of the remaining 12, 1 pastor declined, 1 pastor declined because of contractual obligations with his former congregation, 2 pastors responded in the affirmative but after the deadline had passed, and the remaining 8 pastors did not respond.

Once the 2 associate pastors agreed to participate in the pilot study, the researcher sent both pastors a detailed description of the research proposal along with the IRB consent form to be signed and returned. Upon receiving the consent form, a date and time was established to conduct the interview utilizing Skype thereby allowing the researcher and participant to see and hear each other, as well as allowing the researcher to record the interviews.

Each interview lasted approximately 45 minutes. Once each interview was completed, the interviews were transcribed verbatim by the researcher. Upon completion of the transcriptions, the interviews were emailed to the participants to verify that the contents of the interview were captured correctly. The researcher then provided the interview transcripts to Drs. Ellinger and McWhorter so that they could provide feedback about how the interviews were conducted, assess how the implementation of the interview protocol was done, consider if additional probing or other follow-up questions were needed, and to suggest areas for improvement to the researcher.

After the interviews were conducted and transcribed, the researcher then engaged in data analysis specifically using Interpretative Phenomenological Analysis (IPA). Using IPA allowed for the researcher to more fully explore participants' views on the area of interest within the study, as well as including the researcher's interpretation of those views thereby making sense of the information outside of the participants' personal world of experiences (Smith, Jarman, & Osborn, 1999).

Specifically, the researcher began reading and reviewing the transcripts multiple times while writing notes in the margins of any information that seemed significant.

Following this, emerging themes were noted and connections between these themes were listed.

The preliminary insights drawn from the analysis of the two pilot interviews were:

1. It appears that political dynamics influenced the interim appointments and processes.
2. There was evidence of emotional turmoil for interims.

Following the pilot study and insights gleaned from the process, the following improvements were made for the main study.

1. Utilization of snowball sampling with pastors who agreed to participate and recruitment notices to obtain participants.
2. The timeframe for transitioning back into the former role (or assuming a new role) was adjusted (currently 5 years from the time of transition increased to 8 years).
3. The researcher must not make assumptions about terms, structure, or other aspects of the protestant denomination.
4. Expanding and refining of the interview protocol to capture the "career history" of the pastors who served as interims; and, to probe more deeply into their actual experiences and to focus on the "before, during, and after" the interim appointments.
5. The interviews would be longer (60 – 75 minutes).
6. Increased attention to analysis using IPA will be necessary.

Design of the Main Study

A qualitative phenomenological multiple-case embedded case study design was employed for this study (Creswell, 2014; Creswell, 2013). Kanji (2012) noted that "qualitative research offers a unique insight into people's experiences and perspectives, providing a comprehensive understanding of their beliefs, attitudes, and behaviours" (p. 239). Qualitative research helps to provide understanding, context, and rich descriptions to various facets of events and interactions within the social world (Denzin & Lincoln, 2000; Dharamsi, Cobban, & Compton, 2004). Qualitative research enables the researcher to more fully explore a particular phenomenon through asking "what," "how," and "why"

questions as opposed to potential generalizations that come from asking "how much" (Kanji, 2012).

Case study research is an appropriate form of inquiry when the researcher wants to address "how" and "why" questions. Case study research also allows for an empirical inquiry into the specific phenomenon of interest by drawing upon multiple facets of evidence (Yazan, 2015; Yin, 2002, 2014). Merriam (1998) noted that case studies are "an intensive, holistic description and analysis of a bounded phenomenon such as a program, an institution, a person, a process, or a social unit" (p. xiii). Merriam (2009) subsequently added that case studies are "an in-depth description and analysis of a bounded system" (p. 40). As a form of qualitative research, the case study should search for "meaning and understanding," the researcher should serve as "the primary instrument of data collection and analysis," "an inductive investigation strategy" is used, and the end result is "richly descriptive" (Merriam, 2009, p. 39). For this research, associate pastors within a protestant denomination who served as interims in the role of senior pastors during a period of vacancy and subsequently did not receive the position permanently were studied. Thus, pastors represent the unit of analysis within this case study research which involved a multiple-case study (embedded) design (Yin, 2014). In essence, the pastors are embedded within congregations which are affiliated with this protestant denomination and multiple pastors' experiences as internal interims were examined.

Phenomenological studies seek to understand the lived experiences of an individual or individuals from their particular perspective (Berg, 2007). These studies focus on the experience of an individual or individuals and deeply explores a facet of their lives as they have come to understand it over time (Marshall & Rossman, 2006).

Creswell (2007) concurred noting that the focus of a phenomenological method is to more fully understand the essence of the lived experiences of a phenomenon. Therefore, the goal of phenomenological research is to "explore and search for the essential, invariant structure (essence) or the central underlining meaning of the experiences that contain both the outward appearance and inward consciousness based on the memories, images and meaning" of those participating in the study (Moustakas, 1994, p. 52).

Therefore, employing a qualitative phenomenological multiple-case embedded study design enabled the researcher to explore a “phenomenon within its context using a variety of data sources" thereby ensuring "that the issue is not explored through one lens, but rather a variety of lenses which allows for multiple facets of the phenomenon to be revealed and understood" (Baxter & Jack, 2008, p. 544). Therefore, this type of qualitative inquiry provided a method of research that was both rigorous and thorough (Moerrer-Urdahl & Creswell, 2004; Moustakas, 1994).

Research Context

The mainline protestant Christian denomination that the associate pastors, who participated in this study, were affiliated with has approximately 10,000 ordained ministers (pastors) serving in thousands of congregations spread throughout the United Sates. Since its inception, this protestant denomination has gone through many changes and now has an established membership of a few million baptized members. This denomination has a strong history and focus on Christian education. It also engages with various auxiliary organizations both locally and internationally to meet a wide variety of physical, emotional, and spiritual needs of individuals and their communities.

This protestant denomination and its respective congregations are non-profit, tax-exempt organizations as described by the 501(c)(3) code section of the Internal Revenue Service. Religious, non-profit organizations, like this protestant denomination, comprise approximately 350,000 congregations throughout the United States (Reich, Dorn, & Sutton, 2009) and claim a membership of over 150 million individuals (Grammich, Hadaway, Houseal, Jones, Krindatch, Stanley, & Taylor, 2012).

Due to the undeniable presence that these organizations have in impacting a wide berth of the population (DiIulio, 2011; DiIulio, 2004), the potential crisis of a mass exodus of key personnel within these non-profit organizations and the critical nature of organizational transitions, whether expected or unexpected, makes succession planning within non-profit organizations an important topic (Carman, Leland, & Wilson, 2010; Froelich, McKee, & Rathge, 2011; Johnson, 2009). Yet, the current literature has been limited with regard to specific succession planning processes and procedures adapted for non-profits, especially religious non-profits (Allison, 2002; Austin & Gilmore, 1993; Carman, Leland, & Wilson, 2010; Froelich, McKee, & Rathge, 2011). In addition, the existing literature on interims, a critical component of succession planning, has generally failed to explore the experiences of those employees who serve as internal interims and fill these vacated positions on a temporary basis during times of organizational personnel transition (Browning & McNamee, 2012).

Therefore, the focus of this research was on pastors from this protestant denomination who once were serving in congregations as associate pastors at the time of the departure of the senior pastors of the congregations. These associate pastors then assumed the responsibilities of the senior pastor positions while the congregations sought

to fill the senior pastor positions permanently. Ultimately, the congregations decided to fill the senior pastor positions permanently with others instead of the associate pastors who had served as interims. Upon the arrival of the new senior pastors, the associate pastors returned to their previous roles and responsibilities within the congregations they were serving before the time of the transition.

Sample Selection Strategy and Criteria

Sampling, as broadly defined within qualitative research, is "the selection of specific data sources from which data are collected to address the research objectives" (Gentles, Charles, Ploeg, & McKibbon, 2015, p. 1776). Further, sampling from a phenomenological focus is clearly focused on people (Cohen, Kahn, & Steeves, 2000), whereas case studies look specifically at potential data sources "that best help us to understand the case" (Stake, 1995, p. 56).

A purposeful, criterion-based sample strategy was used for this qualitative phenomenological multiple-case embedded study. Purposeful sampling focuses on identifying and selecting cases that are information-rich and most effectively utilize the limited resources of the researcher (Palinkas, Horwitz, Green, Wisdom, Duan, & Hoagwood, 2015; Patton, 2002). Individuals or groups of individuals who are knowledgeable or have experience with a particular phenomenon were identified and selected through purposeful sampling (Creswell & Plano Clark, 2011; Palinkas et al., 2015). Specifically, criterion sampling sets forth the particular criteria that the researcher considered when selecting participants for this study (Onwuegbuzie & Leech, 2005; Patton, 2002).

In terms of the criterion for soliciting participants for this study, the researcher focused specifically on pastors within this protestant denomination who at one time served in the capacity of an associate pastors in congregations when the senior pastor positions in those congregations became vacant. The associate pastors then assumed the roles and responsibilities of the senior pastor positions during the time of transition but did not obtain those positions permanently when the position s were eventually filled.

The former associate pastors included in this study represented congregations from different geographical locations across the United States, thus ensuring maximum coverage of congregations within the protestant denomination. Additionally, a maximum timeframe of 8 years from the time the associate pastors transitioned back to their former positions after serving in the interim roles was utilized. By allowing for a timeframe in which the memories of the interim experiences are still fresh in the mind of the associate pastors, this will have given the former associate pastors an opportunity to process their experiences, retrospectively, during and after the transition whether that be with the same congregations or while serving at other congregations as either an associate pastors or senior pastors.

To ensure a broad representation of experiences, and to obtain richer information, a minimum of 10 former associate pastors who met the aforementioned criterion for the research were to be included in the study and interviewed. Interviews were to be continued with associate pastors until data saturation was achieved (Gentles et al., 2015). For a phenomenological study, Cohen et al. (2000) noted that less than 10 participants is a desirable sample size if the participants are being followed intensely and more than 30 participants is reasonable if the participants are being followed less intensely. With

regard to case studies, Stake (2006) noted that less than 4 participants and more than 10 limited the case study. Guest, Bunce, and Johnson (2006) also noted that if interviews are being used then approximately 12 participants are sufficient. Lastly, within Interpretive Phenomenological Analysis (IPA), smaller sample sizes are valued as they allow the participants to "think, talk, and be heard" (Reid et al., 2005, p. 25).

Within qualitative research, the sample size needs to be large enough to reach data saturation and small enough to allow for a deep analysis of the cases researched (Onwuegbuzie & Collins, 2007; Sandelowski, 1995). Therefore, soliciting a minimum of 10 participants was expected to provide a sufficient representation of experiences and a rich and thorough degree of information.

Upon emailing potential participants for the study, 13 pastors responded that they would be interested in participating in the study. All 13 pastors were interviewed as their experiences and information added to the richness and thoroughness of the study. Table 1 below represents the associate pastors who comprised the study which included the 2 associate pastors from the pilot study and the 13 associate pastors that were subsequently interviewed.

Table 1

Associate Pastors Participating in the Study

Interview Participant Number	Pseudonym Name	Interview Format	Gender
IP01	Gene	Skype	Male
IP02	Bobby	Skype	Male
IP03	Michael	Skype	Male
IP04	Cole	Skype	Male
IP05	Jim	Skype	Male
IP06	Mason	Skype	Male
IP07	Dustin	Skype	Male
IP08	Chad	Skype	Male
IP09	Laurence	Skype	Male
IP10	Austin	Skype	Male
IP11	Joey	Skype	Male
IP12	Dalton	Skype	Male
IP13	Case	Skype	Male
IP14	Mitchell	Skype	Male
IP15	Reid	Skype	Male

As Figure 1 depicts, these 15 associate pastors were geographically distributed throughout the United States (US) to ensure broader inclusion within this denomination.

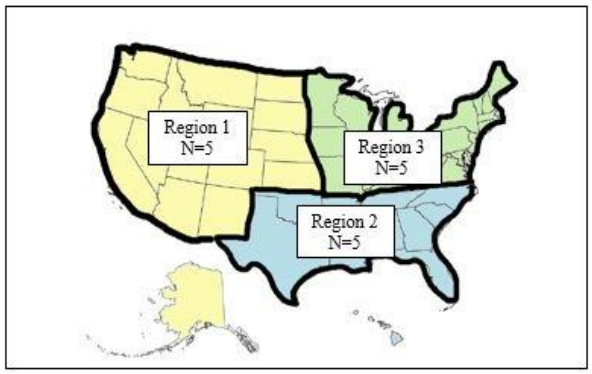

Figure 1: *Distribution of Interview Participants across Three Regions of the U.S.*

Role of the Researcher

As the researcher, it is critical that I examined my personal position in this study and was forthright in my particular knowledge, bias, and general perceptions that I have about the protestant denomination and the various ways that I have experienced pastoral transitions impacting both myself and those around me. I have been a member of this protestant denomination for close to 40 years and I have served in the capacity of Youth Minister for over 19 of those years. My unique position working within two different congregations that are a part of the protestant denomination has given me the opportunity to work alongside many senior and associate pastors. I have also experienced three senior pastor vacancies during that time and witnessed the challenges that these times of pastoral leadership transitions have upon a congregation.

My familiarity with this protestant denomination and various segments of religious non-profit organizations served as both a positive and a negative opportunity and challenge in relation to this study. From a positive vantage point, having a working understanding of the unique dynamics of religious non-profit organizations, especially in

this protestant denomination, allowed for a degree of familiarity with certain systems and processes that are utilized, as well as the particular vernacular of those associate pastors who served in the interim positions.

On the other hand, my familiarity with religious non-profit organizations and this protestant denomination might negatively impact the study through the omission of fully understanding scenarios due to assumptions and the transference of my experiences into the data instead of completely focusing and understanding the participants' perspectives and meaning. Therefore, with the use of member checks, peer evaluation, an audit trail, and reflexivity to ensure a higher degree of validity (credibility) and reliability (dependability) within the context of the qualitative study, I was able to ensure that I have accurately portrayed the essence of the experiences as articulated to me by the participants in my study. Furthermore, awareness of my own potential biases which were both reflective of strengths and weaknesses that I brought to this inquiry enabled me to be mindful of how my experiences in the protestant denomination might influence the data collection, data analysis, and final reporting (Patton, 2002).

Approaches to Data Collection

The collection of data was facilitated through the use of semi-structured interviews that were conducted with each of the participants. Ideally, personal face-to-face visits would have been held. However, given the researcher's interest in obtaining a broader geographical distribution of participants, Skype videoconferencing was used as the approach for conducting the interviews. As such, the researcher and the participants being interviewed could see and hear each other during the interviews, and each

interview was audio recorded so that they could be subsequently transcribed for analysis purposes.

The use of semi-structured interviews allowed for the opportunity to obtain specific information while also giving the respondents freedom to share their worldviews and engage in possible new ideas on the topic (Denzin & Lincoln, 2007; Merriam, 2009; Rabionet, 2011). Therefore, a semi-structured interview protocol was designed to explore the experiences of the participants with regard to their time before, during, and after serving in the capacity of the interim senior pastor role was used (See Appendix C).

Along with the interviews, the researcher focused on observing the participants and made notes about what was observed during the interviews. Merriam (2009) stated, "observational data represents a firsthand encounter with the phenomenon of interest …" (p. 117). Observations also serve as one of the major ways that data is collected in qualitative research and when combined with the actual interview transcript and thorough document analysis can lead to a "holistic interpretation of the phenomenon being investigated." (Merriam, 2009, p. 136). In addition, field notes, which are the written accounts of the observations made, were written as soon as the interview was over and with rich detail to more fully capture the researcher's observations about the participant, the interview, and the interview setting (Merriam, 2009).

Data Collection Procedures

Institutional Review Board (IRB) approval was requested from The University of Texas at Tyler to conduct this research. Once IRB approval was obtained, the researcher utilized the protestant denomination's website to locate the email addresses of the various denominational leaders to contact them with regard to their knowledge of any pastors that

met the criteria for this research study. Once the names of potential participants had been acquired, their email addresses were obtained from the protestant denomination's website and they were initially contacted by email to garner their interest and availability for participating in this study. A total of 19 associate pastors were contacted and 13 agreed to participate in the study.

Once the participants agreed to be included in the study, they received a consent form, which was emailed to them. This form outlined the IRB approval for the study, as well as the requirements for their participation and commitments by the researcher to ensure their confidentiality. Upon receipt of the signed consent form and agreement to participate in the study, a date and time was confirmed along with the method of communication (Skype) for the semi-structured interviews. In advance of the scheduled interview, the participants received the interview guide listing the major questions that would be asked during the interview so that participants could articulate their experiences more fully at the time of the interviews.

All of the interviews were tape recorded with the permission of participants (audibly and visually) and then the audio was transcribed verbatim after each of the interviews was completed. The interviews were approximately 60 minutes in length. The pastors were encouraged to discuss their experiences before, during, and following their interim roles.

To maintain the confidentiality of the participants' identities, pseudonyms were used for all of the participants. Bryman and Bell (2011) noted that "… the identities and records of individuals and organizations should be maintained as confidential" (p. 129).

Field notes that were taken during the interviews were added to the respective pastors' transcripts, along with any comments from the observations that were also noted by the researcher during and following the interviews. Each of the transcripts were then emailed to the respective participants to verify that the information from the interview was transcribed correctly. All of the recordings of the interviews, subsequent transcriptions, field notes, and any other respective electronic data were secured on a password protected and encrypted computer and paper copies of materials were secured in a locked file cabinet to which only the researcher had access. As the instrument of research, the researcher served as the interviewer, the transcriber, and analyzer of the data.

Approaches to Data Analysis

Interpretative Phenomenological Analysis (IPA) was used as the approach for the data analysis (Smith, 2004; Smith & Osborn, 2003). IPA is designed to explore the way in which people make sense of their lived experiences especially those significant moments that are life-transforming (Smith, 2004; Wagstaff, Jeong, Nolan, Wilson, Tweedlie, Phillips, Senu, & Holland 2014). The use of Interpretative Phenomenological Analysis (IPA) allows for a deeper exploration of the various perceptions and experiences of individuals (Finlay & Ballinger, 2006; Pringle, Drummond, McLafferty, & Hendry, 2011). This approach also allows for a two-stage, double hermeneutic, sensemaking process of interpretation from which the researcher can further interpret the participant's sensemaking activity (Pringle et al., 2011; Smith, 2004). In addition, IPA studies have the ability to contextualize the contribution garnered from the research thereby allowing for more transferability in regard to theory building (Caldwell, 2008; Smith et al., 2009).

IPA, from a theoretical vantage point, has three main areas of focus: phenomenology, hermeneutics, and idiography (Wagstaff et al., 2014). The phenomenological aspect of the research seeks to "construct a possible interpretation of the nature of a certain human experience" (Van Manen, 1990, p. 41). Within IPA, the participant's perspective is central to the research, yet the interpretation of the text on the part of the researcher is also critical as it lays forth a coherent investigation into what is being studied (Biggerstaff & Thompson, 2008). The hermeneutics focus of IPA desires to restore the meaning to an experience and therefore strives to bring to light those meanings that have become hidden or embedded in the subject's personal experience (Ricoeur, 1970; Wagstaff et al., 2014). Lastly, the idiographic aspect of IPA explores how a specific person in a given context makes sense of a particular phenomenon with the assumption that the person is an active interpreter of his/her subjective world (Cohen et al., 2000; Wagstaff et al., 2014). With the idiographic emphasis of IPA, transferability of results to a wider population are minimized and instead, readers are encouraged to make their own connections based on their personal and professional experiences in conjunction with the existing literature (Smith & Osborn, 2003; Wagstaff et al, 2014).

The process of IPA is to analyze data on a case-by-case basis and then later make comparisons across all of the cases (Arroll & Senior, 2008). Within this method, the researcher will read a transcript multiple times allowing the researcher to become more familiar with the material thereby permitting new insights to emerge (Smith & Osborn, 2007). The initial coding and a summarization of ideas will then lead to an extraction of key words and phrases that will capture the essence of the content. This procedure was repeated for each of the transcripts. Smith and Osborn (2003) noted that at this point the

researcher will begin to identify patterns that are repeatedly emerging while also allowing for the addition of other topics to be identified.

Next, Arroll and Senior (2008) stated that the researcher should then begin looking for thematic connections amongst the transcripts that will then be clustered and developed into a consolidated list of master themes. The themes will then be reread to make sure that they can be recognized within the transcripts. Lastly, all transcript quotations will be noted per their themes so that illustrations of the themes can be presented.

For this study, the researcher engaged in IPA analysis. Specifically, the researcher began by reading each transcript multiple times. Upon reading the individual transcripts, significant words and ideas were noted on the transcript. These transcripts were then shared with Drs. Ellinger and McWhorter to compare preliminary coding.

Following this, the researcher read the transcripts several more times and began notating emerging themes. These emerging themes were then clustered together for each particular interview. From there, these clusters of themes were examined over the entirety of all the interviews to see if there were some general themes that transcended most, if not all, of the interviews.

In addition, the researcher developed a portrait for each of the participants based upon their interview data that was collected. The creation of these portraits gave voice to each of the participants and recounted their experiences accordingly. This enabled the researcher to further distill and interpret the interview data and is deemed most crucial in IPA as it highlights the importance of the participants' stories and the manner in which the researcher has interpreted them (Smith, Jarman, & Osborn, 1999). Each of the

portraits were then sent to the respective participants for member checking purposes and suggestions for changes were addressed in the portraits.

Two pastors asked for a slight change to their portraits. One pastor asked that a timeframe be more clearly presented and the other pastor asked for additional masking with regard to a specific ministry he began at his congregation. Both of these changes were made to the portraits.

Validity and Reliability in Qualitative Research

When considering validity and reliability in qualitative research, Merriam (2009) noted that there are differences in the standards of rigor when compared to quantitative studies. To obtain a high level of validity and reliability, qualitative research should give "careful attention to a study's conceptualization and the way in which the data are collected, analyzed, and interpreted, and the way in which the findings are presented" (Merriam, 2009, p. 210).

Internal validity addresses the congruency between the research findings and reality or, in other words, is the research actually measuring what it believes it is measuring (Merriam, 2009)? The issue within qualitative research is the elusiveness of reality and the relativity of validity (Maxwell, 2005) thereby leading researchers to examine other strategies besides the traditional internal validity in which a high degree of credibility can be obtained through the correspondence that exists between the research that is being done and the real world in which people live (Merriam, 2009; Wolcott, 2005). Merriam (2009) highlighted Denzin's (1978) work to increase internal validity or credibility by utilizing triangulation: multiple methods, multiple sources of data, multiple investigators, or multiple theories to confirm the findings that are emerging in the

research.

Therefore, in relation to the various strategies that exist to increase credibility, this researcher used member checks, also called respondent validation. Member checks are based on the idea of sharing the themes that are emerging from the research and garnering feedback from some of the participants of the study (Merriam, 2009). In so doing, it helps to eliminate "the possibility of misinterpreting the meaning of what participants say and do and the perspective they have on what is going on" (Maxwell, 2005, p. 111). In addition, Maxwell (2005) believed that such a strategy helps the researcher to identify any personal biases or misunderstandings in regard to their observations. In this study, the researcher emailed the transcripts back to the respective participants to verify that the interviews were captured accurately. Then, the researcher later emailed the respective portraits of the participants back to each of them to verify that the essence of the interviews were fully shared.

To increase the credibility of the research, peer examinations were also utilized (Baxter & Jack, 2008). Peer examinations gather the perspectives of others who were involved in the process which, in turn, provides "additional depth to the findings" (Zunker & Ivankova, 2011, p. 875). Specifically in this study, the researcher worked closely with the co-chairs of the dissertation, Drs. Ellinger and McWhorter, by sending copies of the transcripts and portraits to them to verify whether the essence of the transcript data was fully disseminated and described in the portraits. In addition, the researcher worked closely with Drs. Ellinger and McWhorter to garner their perspective of the general themes that were emerging from the data.

Reliability, from a traditional perspective, addresses the degree to which findings

would be replicated if a particular study were to be repeated (Merriam, 2009). Due to the dynamic nature of social settings though, the traditional understanding of reliability is problematic within qualitative studies because the replication of a study does not necessarily yield the same results, but at the same time it does not discredit the reliability of the study either (Merriam, 2009). Lincoln and Guba (1985) instead utilized the idea of "consistency" in which case reliability is obtained when those examining the research and the data collected agree that the results are consistent with the data that has been collected in the study (Merriam, 2009).

To ensure a higher degree of consistency within the study, the researcher drew upon peer examinations, as well as, created an audit trail. The audit trail of the research findings was maintained thereby providing sufficient details for other researchers to have the possibility to repeat a similar investigation within the same setting (Beck, 1993; El Hussein, Jakubec, & Osuji, 2015). Specifically, the researcher kept all correspondences with the participants in the study. These included the initial emails asking the participants for their willingness to participate in the study, their official consent forms, the audio and visual recordings of the Skype interviews, the transcripts of the interview, and the portraits that were developed for each of the participants. In addition, a date and time log were established for each of the interviews. Each of the transcriptions also had observation notes that were written after each interview took place, along with field notes. Lastly, the researcher also maintained all correspondence from his dissertation co-chairs, Drs. Ellinger and McWhorter, throughout the study.

Lastly, external validity with regard to its role in providing rigor and robustness in qualitative research is considered in terms of transferability as opposed to

generalizability. In achieving transferability, Merriam (2009) mentioned utilizing “rich, thick descriptions” which refers to “a description of the setting and participants of the study, as well as a detailed description of the findings with adequate evidence presented in the form of quotes from participant interviews, field notes, and documents” (p. 227). Creswell (2014) concurred noting that when a researcher provides "detailed descriptions of the setting" or offers "many perspectives about a theme," then "the results become more realistic and richer" thereby serving to add validity to the research findings (p. 202). To address external validity in this study, the researcher developed extensive portraits of each of the participants to form an in depth narrative of their experiences. These portraits were then emailed back to the participants to verify that they full captured the voices of the participants. Rich, thick, illustrative quotations drawn from the transcripts and the portraits were included in support of the themes that emerged in this study.

Limitations

This study, as with all research studies, has several limitations that should be acknowledged. The experiences of a modest purposefully selected sample of male associate pastors within a very specific religious denomination, the protestant denomination, were solicited for this study. Thus, it is not possible to claim that their experiences reflect those of other male associate pastors within other religious denominations, or other mixed gender pastors in other non-protestant denominations. It is also possible that the type of experience the associate pastors went through during their time as interims impacted their desire to participate in the research. It is possible that those associate pastors who had negative experiences were more likely to agree to participate as opposed to those pastors who had positive experiences. Additionally, while

face-to-face interviews would have been optimal to enable the researcher to establish rapport, and to be in a position to more thoughtfully observe the pastors in their respective settings, the use of Skype to conduct the interviews allowed for broader geographic access to study participants. The researcher acknowledges that he was able to establish rapport and observe the pastors using Skype, although perhaps not being able to establish the same level of intimacy that might have been afforded by personal face-to-face interviews. Lastly, the role of the researcher may have introduced some potential biases given his familiarity with the denomination. However, conducting member checks with the participants to ensure that the accuracy of their experiences were captured and interpreted, and engaging in peer examination were approaches that were used to minimize the potential of such bias. Although qualitative research is not intended to be generalizable, as is the case with this study, it is possible that, with thick, rich description, readers of this study can determine the extent of user generalizability.

Chapter Summary

This chapter began with an introduction and articulated the purpose of this study, along with the research question guiding the study. Next, an overview of the pilot study was detailed along with its influence on the design of the main study. The main study design was presented along with the research context, sample selection strategy and criteria, and role of the researcher. The approaches to data collection, data collection procedures, and approaches to data analysis used in this study were articulated. Validity and reliability within the qualitative research tradition was established through the use of member checks and peer examination, as well as an audit trail which were all discussed. Lastly, the limitations associated with this study were provided.

Chapter 4 - Portraits

Introduction

This chapter presents the portraits of the 15 participants in this study which include their abbreviated backgrounds, their roles prior to serving as internal interims, and their experiences serving as internal interims, along with their reflections about having served as internal interims and how they processed their experiences. Each of the participants was serving as an associate pastor in their respective church at the time the senior pastor position became vacant. Accordingly, each associate pastor became an internal interim. Pseudonyms have been used for the associate pastors and other individuals that may appear within the portraits and other sensitive potentially identifying information has been masked accordingly.

Gene

Gene's parents both attended a university affiliated with a protestant denomination and received their degrees in education to teach within this denomination. Gene acknowledged that "I have this history there….so I kind of followed in their footsteps when it came time to choose colleges." He said that he had "no designs on becoming a pastor…… never had a [sense that] this is gonna be, this is exactly what I want to do with my life, be able to serve God….didn't have anything like that." However, Gene indicated that while in college, "you just gotta meet the right people and just different people just start shaping you and I was involved in our church back home and ….the home pastor kind of planted a seed, said 'this is something I think you should look at'." As a consequence of various relationships with people on campus and also the nudging of his

pastor back home, Gene eventually finished school at the university and then decided to enroll in the seminary to become a pastor.

While serving in his seminarian internship, Gene had the opportunity to work within a campus ministry which he really enjoyed. During his interviews at seminary, he really looked for opportunities to continue in campus ministry. Therefore, his first call was to a congregation where he accepted the position working half of his time in campus ministry and the other half serving as a parish pastor.

Gene said that he had "served as an associate there or an assistant there for (timeframe) and loved it, had a good time there." He said that there were some key moments there. Gene met his wife while serving at this parish/congregation (not sure of the language) which was one of his "key moments." The other key moment was "meeting my senior pastor there who would really kind of take on the role as just a mentor as even today I kind of put him in that category." It was also the place where he would eventually serve in the interim position at the departure of the senior pastor. Gene considered this congregation to be "an older congregation that was very proud of its history….and not really willing to make movement towards a different and new generation of people." The congregation had both pantry and clothing ministries, as well as, a Hispanic ministry and "did a lot of great things in the community…" He mentions that they were able to open their doors but had a hard time "with the integration part." They were "expecting Hispanic people to suddenly become white people and to do the Anglo church stuff, you know and didn't understand yet why isn't this happening." Gene also felt like the leadership of the church tended to "suppress the boomer generation" by trying to keep those who were younger from serving in leadership roles.

The senior pastor of the congregation, someone Gene referred to as a mentor, was elected to serve in a higher capacity within the denomination. Gene said that “he was dynamic….and a humble man.” Up to that point, Gene had been serving both as a campus pastor and associate pastor at the congregation. Now he was faced with assuming more of the "traditional roles" of the senior pastor. Unfortunately, Gene said he never had a "defined job description saying this is what we expect of you." He said, “the senior pastor just kind of handled that stuff and why my first meeting with him he just sat there and looked at me and he said, ‘okay, what do you want to do?’ and just kind of left it to me to try to figure out which wasn’t that awesome looking back at it, I’m thinking I wish we had a little more direction on that but lesson learned. But he really left that open and so this came about and part of me, half of me had to honor the commitment to (the organization), but that part will not stop.”

For Gene, serving as the internal interim “meant picking up a more traditional pastor duties as the vacancy pastor of preaching every week, shut-in calls, sick calls, and that sort of thing. But I was really kind of limited to that, continued teaching Bible study as I'd been doing but was really preach every week and handle the sick calls, and other duties and really just try to carry on more responsibilities 'cause adding stuff, adding stuff to my plate not taking a lot off but then you know it was a lot. But then the talk was not written down it was just like you'll be the vacancy pastor are you okay with that, yeah I can do that.”

Gene acknowledged that it is difficult to replace a senior pastor “who leads, who’s working probably 50-60 hours a week, probably more knowing him.” In addition to the lack of clarity about the work during the transition, there was also an issue with

compensation. With his increased responsibilities, some of the members of the congregation supported him getting compensated more because of his increased role within the church. However, some of the older members disagreed with that mindset stating that this was part of the role of being the interim and it was just "next man up" and that he should "take one for the company." Yet, Gene said, "….you can't just look at the next guy and say, 'okay, you're up and expect me to know how to fulfill all that on top of what I was doing…."

After the departure of the senior pastor, the call committee began the process of calling the next senior pastor. Initially, Gene was one of the individuals in consideration to be the next senior pastor even though there was a division within the leadership if he should even be interviewed. He was eventually interviewed but it was not a good experience for Gene.

Gene said,

> ….to be honest with you I did a horrible interview, it was awful and I [inaudible] it was, I hadn't interviewed in four or five years, I was nervous, I kind of actually wanted the job you know, I was nervous and it was awful, it was just pathetic. And there was no way, I *[cannot discern]* and based on what they knew for not calling, I wouldn't fault them for that. Where the issue was that nobody gave me any feedback from it nobody said to me we're not going to call you, nobody said anything, I didn't find out anything until the voter's meeting, a call meeting when they put two candidates forward, two or three different candidates forward for the church to vote on.

At the voter's meeting, one of the elders indicated that they had talked to Gene and they were in agreement that he would stay in his current role. In contrast, Gene said though that they had not spoken to him at all about this and that at this voter's meeting was "the first I had heard of that."

Gene was deeply hurt and angry because some of the leaders were in front of the congregation saying something that was not true. Gene acknowledged, "Now looking back I was mad, I was hurt, and I was just like I'm done." Gene said, “I was disappointed with the communication that happened afterwards…..” He would also later learn that the call committee had a criteria for a senior pastor that he did not meet. Gene said, "When it came to looking for a new senior pastor they wanted someone who was in that 50-year old range who would just kind of help keep things going … they were looking for somebody dynamic but of a certain age bracket." In hindsight, Gene believed he was trying too hard to be the person that he thought they wanted instead of being himself.

After not receiving the call, Gene felt his view toward the congregation changed. He said,

> … a lot of that changed after that call meeting where I was not, where it was clear that I would not be the senior pastor. But beforehand I'd say I was just preaching to get people to say hey that was a nice sermon, good sermon today, you're growing, you know you get comments and things like that, do the people pleasing kind of thing. But after I had just kind of figured out like huh, I'm not long for this place or there's something changing because at that point and time when that wasn't offered I actually was thinking about even stepping out for a while from ministry to go focus on [campus] ministry…

Yet, Gene stayed and he felt his voice became more authoritative. He recalled an incident where “we had an English service followed by a kind of a half hour of co-mingling of Hispanic and English service fellowship time….and one of our “[parishioners] went into the parish hall with her donut and coffee and started complaining [about the lack of] a place to sit down because it was full of Hispanic people doing Bible study and Sunday school and what’s amazing is that the [person] complained that those people were, had [the person’s] chair.” Incidents like this frustrated Gene so he shared them with the congregation. He told them, "this is ridiculous, this is the best

thing that our congregation has going for it right now and you're blind to it." He did not want to be a people pleaser anymore; he wanted to be God pleasing. Gene told his parish,

> This is what God is saying, this is what God, this is what He's saying to you. These are the things that I heard and unless you start changing your mind and attitude this place is going nowhere." Gene said, "So then my voice completely changed after that…..So a lot of people definitely started seeing the political kinds of things going on and attitudes and things.

When looking back, Gene appreciated the interim period as a time where he grew in confidence, learned more about administration, realized areas of ministry that he did not care for, and he got to preach more. He learned that he loved "to preach and I love to teach and I want to and … I also learned I love people who are passionate about God's kingdom and about his word. I love helping fire that up." He also worked hard to utilize lay people more often and challenged them in different areas by initially asking the question, "what are the things that only I can do, what are the things that other people can do as well, and started actually getting more people involved?" In addition, his working relationship with the rest of team was something he felt was really good as well. Gene acknowledged, "We were all just a good team … I had good relationships with everybody." Gene felt like the time was a good opportunity for him to learn and realize what he truly enjoyed in ministry.

During the interim period, Gene received several interview opportunities from other congregations. He eventually received and accepted a call a year into the vacancy period at the congregation he was currently serving in. He would leave his former congregation before they received a new senior pastor. He believes that the experiences that he had at his former congregation has helped him to be a better pastor at his current congregation. Looking back, Gene said, "I'm really thankful for my experience there."

For other associate pastors who might be facing a vacancy of the senior pastor position, Gene provided some advice. He said,

> Make sure it's written down, I wouldn't say don't do it, I'd say you gotta make sure you're prepared for it and you pray to God for this, when you pray do that kind of due diligence in prayer and really think through it, is this something that you want, don't, what are your goals, you know where do you see yourself at in life, does this fit in with that? And if you don't get it what would you do? And answer that question, what would you do and how would you look at the opportunity, how would you, 'cause this is an opportunity to do something different and change and what do you want to get out of it? Try asking questions like that instead of just being okay well man up and you do it.

Lastly, Gene indicated that members of the parish may have perceptions that may or may not be correct.

Gene also indicated that "… half the time the congregation won't listen to you. You know they just want to get done." He believes that this is a time when the denominational leadership needs to walk alongside "a congregation, the congregational leadership, once that paperwork's been filed and then you, the senior pastor is leaving and that there is gonna be a transition." In addition, many congregations do not want an intentional interim. They "want to get our guy today" but the reality is that the timeframe for getting a new senior pastor could be up to two years which may mean that the internal interim has lengthy commitment to his own pastor duties along with those inherited with the vacant senior pastor position. Congregations need to be taught the right things to do during a transition. Communication is key. According to Gene, here needs to be "clear lines of communication." Another important issue is preparation and as Gene noted,

> I believe he [departing senior pastor] could have, just administratively-wise, okay here are the kinds of things that help you out, I'm gonna train you how to do different things. But unfortunately, that wasn't his nature either, he wasn't an administrator. He was a great parish pastor….he's a missionary at heart.

Even though Gene would gather with colleagues, including his former mentor, he said, "….preparing to, how to lead and even run and organization was missing."

Bobby

Bobby grew up in the Southern region of the United States (US) in what he referred to as "Baptist country." He was not a life-long member of the protestant denomination in which he now serves, but Bobby eventually attended this denomination's seminary and was later called to return to the South for his first pastor position in a rural church. Bobby jokes that, "God sent me there first 'cause I would have never went there second." He commented "that would have been my loss" [because] "It was a great place to start out."

From there, Bobby said it "was kind of a pivotal point for me in terms of [what] we [he and his wife] had kind of mapped out." He said, "we had kinda thought… we're gonna go to a large church and I'm gonna specialize in the outreach and worship, and she's [Bobby's wife] gonna teach, and do all that." An opportunity presented itself for Bobby to move on from the rural church but "God wouldn't give me any peace at all on that" so he turned that opportunity down.

Shortly after that decision, one of the leaders within the denomination's organization contacted Bobby and suggested another congregation to him. The leader said, "I think you would be a good fit. I think you could get them going … they're just stuck. They're not growing. You know, kind of the old mentality … I don't know what they're waiting on." Bobby thought it was a good fit so he and his family moved to this new area to serve that congregation.

During his time at this congregation, Bobby helped the congregation in building a new sanctuary because "the building was so atrocious that we just needed that build[ing], and it was a good thing, and exploded in growth … at that point it really grew." The downside to building a new sanctuary was "we couldn't afford more staff" which led Bobby to feeling like he "was going to burn out." He felt like "it was time to move" even though "my wife was not in agreement with that." This desire to move on led Bobby to his next congregation where he served as the Director of Worship even though he actually wore "a lot of different hats" during his time there. He and his family stayed with that congregation for a few years before moving to his next congregation in which he served as the associate pastor. It was during his time serving at this congregation that the senior pastor would retire and Bobby would step into the role of an interim.

The senior pastor and Bobby had several years to work together before the senior pastor announced his retirement. Bobby felt like the senior pastor had "been coasting for a while" before he actually retired. The senior pastor had been at the congregation for several years and had "seen them grow from a little country church … out in the far suburbs to suburbia." During his time serving as the senior pastor, the church went through a "growth period, a lot of growth while he was here." In reflecting about the senior pastor, Bobby said, "… he had done some great things [but] by the time I think we got here, he was a little winded, and had kind of run out of creative juices."

After the retirement of the senior pastor, Bobby began to pick up some of the roles and responsibilities of the senior pastor position. He indicated that nothing was written down but he did have "a conversation with the Board of Directors." They were asking questions such as "'Do you think we can do this? Do you think we need an

intentional interim?'" [Researcher Note: an intentional interim is an assigned interim who travels within the denomination to fill such vacancies. This type of interim is different from the internal interim who simply assumes the senior pastor's responsibilities]. Bobby felt like they had already "been coasting" for some time with the senior pastor at the helm so he told the Board of Directors that "We've got enough staff here that can do this." "… ministry's not gonna be impacted."

Though "there wasn't much direction given" outside of "Keep things running; keep us moving," Bobby was proud that they "… launched new ministries in the year vacancy to continue to just grow." "Everything kept going; we kept growing; we kept doing things."

Prior to the actual retirement of the senior pastor, the senior pastor had made his intentions known about a year out that he was preparing to retire. It was during this time that a call committee was established and also a time when Bobby had to make some tough decisions. Bobby had received an offer to work at another congregation and he was "really struggling" with this decision so he began having "many conversations" with the senior pastor and the Board of Directors.

When Bobby spoke with the senior pastor he said, "Look I know you can't guarantee me this job. I need to know what are you hearing because if this is gonna be something that I'm not gonna be considered, I need to know that now." In his conversations with the Board they told him, "Oh yeah you meet all the qualifications; you meet all of this."

Bobby felt like he "stayed more on the basis that we had really started hitting momentum again." Yet, he asked the tough questions because he knew how hard it could

be for him personally if the congregation decided to bring in someone else to fill the senior pastor position,

> I needed to know 'cause if we were gonna bring somebody else in, chances are I don't know that that's gonna work. It depends on what you do obviously. But the odds or the normal statistic is not good if you're gonna stay on. So I needed to know that.

Committed to this decision to stay, Bobby mentioned that he had asked the senior pastor "some point blank questions, and later on I found out he point blank lied to me." He later would find out that "… he just didn't tell me the whole truth because basically he relied a lot on [Bobby and his wife] and he didn't wanna go in to his last year of ministry without us being here." It was a frustrating revelation for Bobby especially with the ensuing issues that would develop with the call committee. Bobby would later confront the senior pastor about this to which the senior pastor responded, "Well it wasn't really a lie." Bobby would respond, "Well I don't know what you'd call it. I asked you yes or no; you said 'yes' and it was no. That's a lie."

With regard to the senior pastor position that was becoming open, Bobby would not say that he "absolutely wanted it" but he "would seriously consider it." He felt like he had invested the time in the congregation and the momentum that they were experiencing was due "in no small part because of the ministries that we had started …" Therefore, based on some of the promises that the senior pastor had made and the sentiments echoed by the Board of Directors, Bobby allowed himself to be considered for the senior pastor position. Yet, it would not be long after the call committee was formed that Bobby felt like these individuals began to run rogue and he had a premonition that he would not be selected.

Bobby said,

> This call committee operated differently … they ran amok, and they just kind of ran rogue. It was supposed to be a subsidiary of the Board of Directors. We are a policy-based governance here, and the Board appointed them, and they quickly told the Board that they would not report back to them.

With this dynamic happening within the call committee, Bobby knew things did not look good for him becoming the next senior pastor. "… it became very clear to me … the Holy Spirit at that point said kinda in me, 'You will not be senior pastor here.'"

Early on in the call process Bobby noted that "I was actually in the mix; went through the first interview." Sometime after that initial interview, the call committee brought in someone from the outside to assist them with the process. Bobby said, "They got a guy to guide them, but he was used to corporate; he had really no expertise in the church realm. He'd always done ‘corporate how-to transitions’ in corporate America, and so that's the way they ran it." Bobby said,

> So I came in to a room 'cause they wanted to talk to me, and this guy is there and I was told that I would not be sought after as senior pastor. I asked, 'Why?' and they said, 'We're not gonna give you any reasons why.' To this day I have no idea why I was passed over or what it was, and so that's kind of how it went. That's when I knew for sure, like I said; I had this premonition, whatever you wanna call it. I believe that the Spirit actually does sometimes communicate and let you know things.

The experience was a difficult one for Bobby. He shared that, "I kinda knew and so I kinda had already prepared for it but it still hurt." His experience became even more bothersome as "they started parading guys in, to meet with us who had no qualifications hardly whatsoever. Certainly not more qualified and had the kind of experience that I had, and it was really a more hurtful thing." Bobby mentioned, "For them to have said that just makes no sense."

Bobby also noted some of the political upheaval happening within the call committee and the congregation during this process. "… they had violent arguments on

the call committee … and then in the midst of all that come to find out that all these people from the congregation are writing letters [asking] 'Why is this not happening?'" "So it's a mess as you might guess."

Serving as an interim with all of the political upheaval happening within the call committee, Bobby believed that he still was able to do some good things. He said, "I think the things that we did good would include actually launching a couple more ministries that were effective, and things where more people connect." Our "finances held steady" and "we actually communicated, quite frankly, as a team a whole lot better." Also, "during that year of vacancy, quite frankly, a lot of those silos started to crumble a little bit because we had to rely on each other."

Bobby also noted that there was "a little bit of nervousness" initially as he took over the interim role. He noted,

> … it's hard to measure what percentage was that; 10 percent; was it 20; was it 50? I don't believe it was 50 percent; I'd say it was maybe a third at most that seemed to be – and then they kind of eased up. And it kind of got less and less once they progressively realized, "Hey worship services are still happening; we're still getting new members; there's new member requests; their school's doing okay; and this is doing okay" and they kinda eased up. But I think at first there was this like big – you could kind of feel this big [sighs], you know.

Along with serving as the interim, Bobby had to contend with the dynamic of potential new senior pastors, who could ultimately be his boss, visiting the congregation. He acknowledged that "… the call team made this decision that they weren't going to pursue me. So at that point yeah, there were some oddities … as they brought in candidates."

One of the candidates that was interviewed did not seem like he was going to be "a good match" from Bobby's vantage point. "So when I questioned that with the call

team I got pulled in to the Board of Directors who said I need to play nice." This particular candidate would eventually get passed over but Bobby said that period "was a little stressful because" they believed that Bobby was "just showing … sour grapes." Bobby would respond with, "No it's just you can't answer why this isn't a good fit … so there was still a little bit of oddity at that point."

When a pastor finally accepted the position of senior pastor at Bobby's church, Bobby said, "It's a little goofy [but] … I've been feeling like a job and a half for the last year, and a quite frankly I was tired, and so that was okay." The difficult thing is figuring out "Who is this guy gonna be? What's he gonna be?" He would go on to say, "The odd part of it is I actually had somewhat of a friendship with the guy who came here."

In describing this pastor, Bobby said,

> … most of what my buddy said, 'This is my leadership style, and all this' …basically he just said whatever he could say to be the pastor here, and it's not at all what his leadership style is. He's not a team person; he's very much CEO minded. Team means, 'You guys report to me to do what I want you to do.' That's not what was described by him, and not what he said around the call team and the staff … So it's been odd; that's been a little stressful. Now if he had come in and actually said what he did it wouldn't be quite as odd.

Reflecting back on his time as an interim and the various things he experienced, Bobby noted that it has "been complicated since we [have] taken a call now and we're getting ready to leave." With his impending departure, it has led to a "lot of very candid conversations; a lot of anger in the congregation." People have said, "We knew this was coming. We knew that you're too good to stay – you're not gonna stay at this position, and we don't understand why we had no ultimate say." Bobby wishes they knew. He said that he told them,

> Well you did … you could have gotten to a voter's meeting and said, 'No we are not gonna vote in a call team that is running rogue and putting up one candidate.

> We're not gonna do that. We're not gonna vote on a person who we haven't met.' You have the power guys; it's not me to tell you what you have. But you did but that's the way it is.

Bobby said, "It's a little bit difficult" because "there's a lot of that going on," but "ultimately we are not leaving because of that decision; we're leaving because we feel like God's nudging us to go." This new opportunity is not a position that Bobby said he would had "envisioned," but once he got to his new location, he and his wife "felt again … this nudging of the Spirit to say, 'This is where I want you.' So it's been a little bit of a wilderness journey."

Looking back, Bobby said;

> I wish they would have told me what the problem was. I mean, I have to be honest, I wish I would have heard. It doesn't mean it wouldn't be painful, but it's very frustrating to not know … I would have liked to have known, you know, 'What is the story?' … I would have liked to have known that, it wouldn't have changed their decision let's put it that way, they would have at least helped me analyze, 'Okay, where am I coming off?' To really help me … where is it that I need to avoid, what is that I'm giving that's an issue. Because you loved me as an associate; what is the deal that you don't see me as a senior? So that would have been helpful.

As far as the way that period impacted Bobby, he said it impacted "the kind of call I was hoping for." One of his struggles is that he said, "I'm getting older…and "Your window of types of calls start closing down, and so I was a little concerned about it, but I've actually had quite a few inquiries."

In addition, the time as an interim confirmed to Bobby that he is a "leader type person; that's who I am, and I'm not your normal second chair guy….I'm also a change agent which tends to rumple people's feathers … If I come in you can expect that we'll do some things differently." "… I'm not your normal second chair; … my idea of being an

associate wasn't just so I could go hone one little narrow sliver of ministry. I've always seen ministry in the big picture." He said, "I wanna be vital."

Bobby also reflected that, "I think that experience with the year vacancy really confirmed to me I wanted to be that first chair, if God would have me there." Bobby said,

> I think just seeing myself and understanding, Yeah I would be able to do this. I need to quit sitting in the second chair, and I need to get back out and do what I can, and see what impact God can use me to make in another church.

For others who may face a similar situation, Bobby suggested, "I think I would be having conversations before that time started, some honest conversations." He also suggested to "get some honest feedback" and "be upfront with yourself." "… you've gotta know yourself is part of the problem; most pastors don't know themselves, and I'm not sure I do either. But I'm a lot closer than I used to be."

Lastly, when Bobby considered how his personal experience and what he learned from it could impact his denomination's organizational structure, he had a few ideas:

> I think sometimes our doctrine of the call gets in the way because – not the actual doctrine but the way we interpret the doctrine of the call gets in the way. Because we take it in this theoretical realm or we take it in this theological realm, and we forget the incarnation realm, what it really is about. That there's real human beings with flesh and blood with both strengths and weaknesses, and there's a lot of that going on. There's not a lot guidance, you get a lot of statistics … and I'm not sure they understand that whole realm. I haven't heard a lot of direct conversation on that, so there's just so much going on in the (denomination's political structure); so much going on in the church. I know that this is a small enough realm that it probably doesn't get a lot of attention, and so maybe that's what this paper does. Maybe this is what your research does; it gets them thinking through some things.

Michael

Michael is a third generation pastor. He originally did not "want to become a pastor" and he said that his "dad never put any pressure on [him] to be a pastor."

Growing up though, he knew some guys that worked in youth ministry and he decided that would be a "neat ministry" to be involved in. So, he attended a college affiliated with his denomination and became a youth minister himself.

During his time getting his degree in youth ministry, he had a professor highlight the limited longevity of his career choice by saying, "you'll get older and the kids will get younger." Along with that thought, one of his deans encouraged him to "go on to the seminary." Michael attend seminary and went on to become a pastor.

Once he finished at the seminary, Michael's first position was as an assistant pastor serving alongside a pastor he had met when he was younger. Michael recalls that time as being his "… first taste of being in team ministry.…" But, he did not stay at that church for long mainly because he and the senior pastor "didn't see eye to eye." Michael said, "… I realized I wasn't a good team player for him. He was a perfectionist ... and so I knew then that I wasn't a good fit for him."

Michael subsequently took a position at a parochial school as their pastor. He considers his time at the school as "a good experience" and reflected on that period by saying,

> You were in the gym with … teenagers, and they know it all. They've been there. They've done it. They have theology class every day for an hour, and then you come to the gym for 15 minutes, and those are the longest 15 minutes of my life. You knew you were on and off in the first 30 seconds, and mostly you're off with teens. So the neat thing about that is that I learned that they had to be [the leader] … that was a learning experience for me is that as a pastor, or a church worker, our job is to get out of the way, and let people do ministry … that really helped me a lot then. It's not about me. It's about what we're doing ... that really helped my speaking delivery style as well …

During his time working at the school, one of his former professors had started serving as the senior pastor at a church near the school and invited Michael and his

family to attend. After several years as just members at the church, the church "just had a DCE [Director of Christian Education] that left, and [the senior pastor] was looking for an associate assistant pastor. So he encouraged me. They sent me a call. So then I accepted it …"

Michael stated, "it's probably not always best to team up with someone of your past, because there are friendships." He said, "He was a great professor" and "it went well." Yet, not too many years after Michael accepted the position as an associate pastor, the senior pastor had an early retirement which "put me in that position…to be an interim."

The church that Michael was serving in when he took over the role as the interim is a huge church with a school attached to it. He described it as a "very wealthy area" and "very affluent." He said, "You had a lot of your members owning their own business, CEOs", [and] "These guys are incredible leaders ... you had a lot of money and you could do a lot of unique things in the ministry … they were all lawyers and doctors." Also, "… they just had the funds. They were busy and active, and it was just a different style."

With regard to his former senior pastor, Michael said he "took that church … to the next level." Michael called him a "hard worker" and a "visionary," but he also referred to him as an "absentee professor" and clarified by saying,

> I mean he was always on the go, and always had visions, but then the rest of us had to take care of it of course. So he was coming and going, and so he wasn't there a whole lot, but he was a character, but it was surprise of a retirement. You know he had mentioned I'll be here for a number of years. He didn't say how many years … later he had a game plan and his wife too. They kind of decided that [it] is quite a good time. The people loved them. So yeah it was very quick and peaceful retirement from the congregation.

At the retirement of the senior pastor, the church formed a call committee and Michael began taking over the role and responsibilities of the vacated senior pastor position. He noted that the leadership did not sit down and discuss with him any specific changes in his job description or requirements. Michael stated, "I did the youth and supported the school, and since he was kind of an absentee kind of guy except for Sunday morning a lot of it I was doing already."

The call committee did approach Michael and asked if he "would be open for a call too" to which he agreed. "… they had the funds that they could definitely bring in someone that has the experience … I was good with the children, and the youth, and so on. So we didn't skip a beat." He goes on to say that "everything went kind of smoothly" and it was "an exciting time."

Personally, Michael said, "… I was excited for the opportunity that maybe I will move into this position. I'm doing it already kind of like, and so I was excited." He went on to say, "… it was a neat place. I work well with the principal, and with the worship leaders, and directors.…" The only "downfall" he saw to all of it was that "there wasn't any good intentional planning on my part or their part." "We didn't sit down … none of us did it intentionally."

Reflecting on that "downfall" Michael shares,

> ... we were ready for the new chapter … So I think yeah hindsight it would've been really healthy that we all sat down and just kind of put our cards on the table, and said you know alright now we're down to one guy. You know I should've asked them, what do you want me to do … you want to prove to yourself and them that you can do the job, and so you kind of took [on] both positions without meeting?

As the call process progressed, the committee narrowed down their search to three potential individuals to fill the senior pastor position with one of those names being

Michael's. He said, "So I was kind of alright cool, that's neat, and you know you have your fan club." He also realized that the other two candidates were former classmates of his.

> I knew these guys … They both were amazing guys … then I started getting more confident, even though they were good I thought well they're classmates so maybe I have an opportunity. I thought they'd get somebody older … So I was thinking maybe there's a possibility.

Eventually the call committee decided that they wanted to present one of the other candidates (Candidate 1) to the congregation to vote on as their next senior pastor. At this point, two of the leaders of the congregation took Michael out to breakfast to let him know the call committee's decision and to ask him for his "help." Michael wanted to be "supportive" and work with the other guy, but he was not sure what his leaders meant when they said, "we need your help."

Michael contacted one of his denomination's leaders to talk about the situation. The leader told him, "… you want to take your name off the call list … just say that you're going to be the associate pastor, and you're good with that …" He also let Michael know that if we wanted him to start looking for positions at other churches he would do that.

Michael took the denomination's leaders advice and took his name out of the running. His "fan club" got "really upset" with his decision. They responded, "… wait a second. Don't we get a choice? You're just going to bring one name to the table, and we don't get a chance to vote. Why should we even come if we just have one guy?" Because of this backlash, the leaders of the congregation and the call committee had some meetings with the congregation and spoke with Michael about the situation. From

those conversations, Michael agreed to put his name back on the list because it "would be the best so people would have a choice."

Also within those conversations, the congregational leaders told Michael, "If you get the call I want it to work for those who wanted (Candidate 1) … If (Candidate 1) gets the call then you're going to have to work hard to get your folks to work with (Candidate 1)." Michael understood the importance of that conversation and told them, "I support that."

The congregation would finally have their voter's meeting and they would wind up voting for (Candidate 1). Michael called (Candidate 1) the following morning to congratulate him and say, "… I look forward to working with you." (Candidate 1) would eventually decline the call though.

After (Candidate 1) declined the call, the call committee began their work again. They asked Michael if he would like to be on the list again to which he responded, "no." He indicated to them that, "My job is to be the associate. I want to keep peace here at [the church]."

He did recommend to the congregational leadership to get an interim pastor. He said, "We should've done that at the beginning." Michael believed that having an official interim would allow him to focus on his job, the job that he was brought in to do. So, "that's what they did. They brought in (Interim Pastor) ... He did a great job."

Upon the arrival of (Interim Pastor), Michael felt that it was probably best for both himself and the congregation if he took a position at another church. That way, "they can start fresh, and new pastors can come and, and they don't have my groupies

and everything." So, several months after the arrival of the interim, Michael took a call to another church to be their senior pastor.

Looking back at his time serving within his former congregation, Michael reflected on some of the many opportunities that he had the chance to be a part of and the good things he experienced. "Probably the best … was definitely to be part of worship Sunday after Sunday." The people in the congregation were also "very supportive and encouraging … even until the end there are not really hurt feelings." "… I was fortunate that they did like me. They liked what I was doing, and having the interim pastor come … I could just kind of be the youth guy with children." "… I knew they were right. I was better with the kids."

As far as challenges and negatives, Michael noted a few items that he experienced during his time as an interim. He related,

> I think the hardest part was not intentionally working closer with the leadership. You know then I would've seen their heart, and my purpose of the congregation a lot sooner I think … That would've helped me to be able to prepare, and it wouldn't be as much of a shock. You know if I would've asked some key questions, and really dig deep. You know they were just being kind and they were grateful that I was there helping and jumping in, but not really being intentional.

Also, during his time serving as an interim is when the congregational leadership wanted to call a different pastor besides Michael to be there next senior pastor. Michael reflected on that period,

> … the breakfast meeting … when they took me out for breakfast that just kind of floored me so I took the rest of the day off. You know I just, crap, and they want me to do something. I don't want to do anything! So with my pridefulness and selfishness … I think that was doomsday at that breakfast … that was just hard to swallow. You know I thought they'd bring … a couple of names … this is who we might recommend, and that's great, but knowing that they wanted me to take my name off or to make it easy for everyone I think was a bummer.

Michael said, "I think the healthiest is … the best thing was to support whoever they support, but be ready to be open to move on so he has a healthy new team that he can put together." "It's really a humbling experience, and so you start to take a look at yourself. It's healthy."

Lastly, as Michael processed the whole experience he said, "I learned a lot. I learned that it's the people's church. I'm not the CEO, Christ is." "… I was a hotshot … I didn't always support the senior pastors as I should've … I know my weaknesses." If he had to do it all over again he said, "I'm here to do this position … Let's bring in an interim so I can do my job, and as you get older you go through your battle wounds, and you realize you know your limitations."

With regard to the advice that Michael would give to other associate pastors who are placed in a position where they have to fill the roles and responsibilities of a vacated senior pastor position, Michael had many things to say,

> I think as a younger person we probably need to sit down more … for any associate going through this saying hey you know what? You want to think this through. After these couple of steps you might still want to be on the list, and that's awesome, but as long as you know if you don't get, or if you do get it, your chances of staying will probably not belong in either direction.

He also said,

> [Y]ou're not hot stuff all the time … You're not everybody's favorite … You know that you really need to work with people … it really humbled me that it's not about this whole pastor position thing, or any title. It's that we're a team and working together.… I realized that you know it's communicating with people, with leaders in a heart to heart, getting inside what they're thinking, because no one is thinking what you're thinking. You think that just because you're in this role that everybody is going to, but when they go home they're talking about it. So, really humble yourself. Get more people involved, and really kind of listen to their point of view. That has really been helpful.

Michael also emphasized the importance of team ministry. For those serving as

an associate pastor or an interim, he felt it was valuable to remind them that we are "all a team." He did not believe that there should be a "hierarchy" mentality, but instead that the associate pastor should focus on the role they have been given. These individuals should not have the "game plan" that one day they are going to be the leader of the church. "Let God be that. Let the church do that."

Associate pastors should ask themselves how they can be "100 percent supportive" of their senior pastor and how they can "learn and develop … to be a supporting team player." Ask, "… how do you fit into this ministry? This ministry is not going to fit you, and this staff has already been developed. You come in you have to fit their needs and their strengths." Michael wishes this was taught in seminary because he feels it is so valuable.

Finally, Michael reemphasized his hopes for other associates facing similar situations,

> … one is, don't have a mindset that this is going to be mine one day, because it never will be. Two is 100 percent support of the staff, even though you can't stand them, your called to support them. Then if it doesn't work you can always move on, and then three is to you have to fit into what they do … I think coming out of school so often as associates or assistants we're taught that we're it, and those guys are not doing a very good job … So then the whole team ministry explodes.

Cole

Cole has a history of family members serving in ministry. Yet, personally for Cole, he acknowledged, "I don't think I [wanted to] be a pastor in the first place." He said, "I would say I'm a Jonah of sorts" in reference to the prophet's noted account of running from God's calling in his life. Yet, Cole mentioned that, "… people would tell me, 'You should be a pastor, you should be a pastor, you should be a pastor.'"

Cole wrestled with what it meant to actually be a pastor. He said, "I know how hard it is; I don't get paid … and people would expect so much from [the pastor]." He eventually told his wife, "You won't believe what they said" with regard to the comments other people were making to him about become a pastor and she responded, "Well, I think you should."

Following that conversation, Cole contacted the seminary and inquired, "How do we do this?" Now, with over 20 years of serving as a pastor, Cole referenced this unlikely journey by saying, "… God is able to use gifts in a variety of ways, and He's still using them today."

The role of pastor has not necessarily been an easy one for Cole as he has been passed over for the senior pastor position on more than one occasion. During these times of transition, he has called himself "the common denominator."

Reflecting back on the first time he served as an interim during the senior pastor vacancy and did not eventually get the position, Cole said, "… God knows what's coming … there was just too much going on; I wasn't ready for it." For Cole, a lot of the struggle revolved around "some challenges with family" and as he strived to take "care of my family" he realized that emotionally he "was kind of out of it." All of this would lead him to comment, "I'm glad I didn't listen to those people … around me" with regard to not pursuing the position of senior pastor during that period. Cole agreed that, "God would know there's no way that I could have taken on … that role. I don't have any adversity or animosity … I trust Him."

The next time this situation happened to Cole was more difficult because he felt like the senior pastor that was selected was not a strong leader and the congregation suffered because of that. He said,

> [H]e was like a moving target. So we would try to support him as best we could as a staff to help him think through some crucial issues; prep him for an upcoming meeting that he was going to have. But … he would fold underneath the will of whoever was talking to him. So I did a lot of leading from the back seat, and I've learned a lot through those years from him, and seeing the senior pastor has to be the senior pastor.

Cole also commented,

> … he was kind of a puppet for us … He didn't have the ability to put his two feet firmly planted in the ground and say, 'Nope this is really what we need to do. That's the wrong direction and here's why.' So he didn't have that ability so I did a lot of leading in the background.

Eventually this pastor would leave and Cole found himself in the interim position again. A call committee was established and Cole said his "name was in that mix and there was a strong contingency to call me as the senior at that point." But before the senior pastor position was addressed, Cole told the church leadership that "… I needed some help; I didn't wanna do everything all by myself. It felt like I was swimming most of the time … and I was trying to figure out what the [senior] pastor was supposed to do …" He added, "we were just trying to keep things from sinking."

The congregation then called an intentional interim to "shake things up around here." Unfortunately, the intentional interim had a "heart issue" and "got sick" while working at the church so he and Cole "ended up switching roles."

Cole "took the lead" and "went to all [of the] meetings" while the intentional interim "took my lesser role." This switching of roles impacted the church's call process for the senior pastor position and caused a "pretty big split in the church." With Cole

having to navigate so many different dynamics, he said that he "learned a lot during that time."

Eventually, Cole determined that he was no longer a contender for the senior pastor position. He noted, "… there weren't really any conversations saying, 'No you shouldn't do it.'" The leaders of the congregation did tell him that "We think that you're so good at personal ministry and we don't wanna lose you in that, whether it's with hospice calls, or shut-ins, whatever." Reflecting on that, Cole mentioned, "… it's not up to me, and so if that's how God chooses to lead His people, then so be it."

Regarding the senior pastor position, Cole said that he would never "stump" for the senior pastor position. But he does believe that he has the "skills and abilities to do it." His time serving as an interim was a "baptism by fire" and has taught him how "to think on [his] feet." He has learned that interims need to be "well prepared" and also have to be "flexible." Lastly, through it all, Cole indicated that he has learned a lot more about working with others:

> So I've learned a lot about people, to listen to them, and to work through relationships; to know what they do; what they're passionate about. If I can put the right people in the right places then everything seems like it might be a lot less work. 'Cause it's not work; it's passion.

During the most recent time of transition, Cole believed that the congregation was beginning to understand that "pastors come and go here." Because of that attitude, and to some degree the stability of Cole assisting during these times of volatility, it seemed like the core of the congregation "breathes easier." Cole noted that "… it seems like they're more relaxed, and more available, and willing to talk, and communicate, and work towards the common goal …"

As far as the leadership of the church and his co-workers, Cole felt like he was not treated any differently during his tenure as an interim because he was already doing the role of the senior pastor in many ways. He commented, "… it's a weird thing to fill that role and not have the title." Cole said, "I don't introduce myself as the assistant pastor or the associate pastor at [church name]. I say, 'I'm one of the pastors at [church name].'"

From the vantage point of the community, Cole says,

> I'm the face of [church name], which also sounds very pride filled but it's not that. But it's the reality that when people think of [church name] and the pastors, I'm the face, and I'm the place that they would go and have a conversation … I'm the one that people would call.

If ever given the opportunity to be the senior pastor of a congregation, Cole stated that "… it would be very easy for me to be that. I know so much about what it takes, and I know what's not happening, and what didn't happen for me …" It that were happen in his current position, Cole was confident and said,

> I could change a lot around here, but it's not my place to do it, and so I need to be humble, to do the things that I need to do to care for the flock. I have to share the Word and do the ministries that are needed … Those who are less fortunate and those who are hurting, to be able to remember them, call on them by name, and to … be a personal shepherd to some of them.

Reflecting back on some of the struggles he has faced in dealing with different senior pastors, and the how that has impacted him during the times of transition, Cole shared the story of King Saul and David in the Bible. He said,

> I think the passage that I always go back to is David, as he had the opportunity to kill Saul a number of times, and was so close, and the people around him, 'Kill him, kill him.' He's vulnerable kill him and in the cave kill him, and his words ring true still today, that 'Who am I to usurp the Lord's authority and the Lord's anointed?' I think that's how I approach the role … the role of senior pastor.

During his tenure serving at his current congregation, both as an associate pastor and as an interim, Cole has also wrestled with inquiries from other congregations who

want him to come serve at their congregation as the senior pastor. He mentioned that, "Over the years I've had numerous calls to other places; interviews with different churches across the state; and it just didn't seem like God ever was leading in that direction." He continued, "… and now we're in a different sort of situation. We may be in a calling situation for another church near here because the senior is considering a call." Cole said, "… they have a strong leader, a strong senior pastor in that church, and so should that call come, I would consider that just a different place and a different time."

In addition, Cole has spoken with some of the denomination's organizational leadership and has told them that, "I'm ready for a change." He said, "… I'm okay with not being senior pastor, but the senior pastor has to be the senior pastor …"For too long he felt like he had been the "shock absorber" and the "go between between the congregation, its leaders, its people, and the senior pastor. That's been my role."

When asked if his former senior pastor could have prepared him better for the time of transition that was ahead, Cole replied,

> No 'cause he didn't have the ability to do it. He was not a … he was not a leader. I learned a lot about what not to do but that wasn't intentional by him in any way. He didn't have the capacity to shape himself, let alone shape others around him. Getting past his frustration with the lack of direction from his former senior pastor, Cole shared some positives that he took from the experience. He said, I think that's the blessing; God can use all people in a variety of ways and He's using [me] here. So I think that He is sovereign, that He knows what He's doing. So it can be disappointing at times, and frustrating at times, but to wait on the Lord is what we do.

Going forward, Cole says that he is not "gun shy" if the opportunity to step into the interim role ever presented itself to him again. He acknowledged,

> Oh no I'm not gun shy at all, I mean, which is maybe stupid but I'm not gun shy. I definitely know that I have that ability to lead, and I think from my position, there are plenty of things that I would do differently even currently. I have an idea of what to do next and the major challenges that lie ahead. But I also know that I

> can't be allowed – I don't allow myself to think like a senior pastor … Again like Jonah, if [God] wants you He's gonna get you. He'll make those situations and those scenarios work as God's will … So if we keep our eyes open for direction … then He'll make Himself known.

On reflecting on the advice that he would give to other pastors who may be facing a similar situation, Cole offered the following words of wisdom. First he said, "… to let the senior pastor be the senior pastor and you can't steer from the back." Next he stated that, "… relationships are crucial, especially in [a] ministry situation." Lastly Cole added,

> Serve in the role in which you have been called. Don't aspire to self-aggrandize to be more than really what you are in the scheme of things where we are servants. So it's not about … having power or a title. It's about serving in the capacity that God has called you. So just be patient, and serve your people, and love them, and get to know them, and to walk with them, to forgive them, and to show them the love of Christ.

When asked about suggestions he would present to the denomination's organizational structure as a whole, Cole came back to both the pastors and the leadership in the local congregations. To the church leaders he would say, "…honor those you have … honor and really seek out to understand their gifts … honor and really seek out to understand their gifts probably then you would know what need to fill."

Also, if a congregation knows what they are looking for and they also understand what gifts a particular pastor brings to the table that is only "two pieces" of the equation. Cole acknowledged that multiple people are involved in these decisions so it is critical to process how the rest of the staff will respond. He said, congregations should ask, "How will [the staff] function? Do they like one another?" And, "… the team ministry really needs to be a team ministry and I think it's lacking in a lot of the churches." Cole concluded, "I long after that and wish I had that; I've never had it …"

For the pastors, Cole said that when an associate is discussing the senior pastor position with the congregation that he should "… have a clear understanding of what they're looking for.…" He also stated that associates should "Be careful what you're praying for …"

Lastly, Cole shared some personal insights. He mentioned that a pastor's first vocation is "to your family … they're your primary responsibility." When it comes to ministry, the church can always find another person to fill the position, but your family "… can't find another Dad … that's really important.…. Cole continued, "Don't spend too much time in the office" because you are thinking, with regard to your family, that "you'll always have them." Instead, "Spend some more time" with your family. He said, "I think being flexible is good, and it's important …." Yet, if you do not have boundaries in your ministry, Cole believed that you and your family will "suffer because of it."

Jim

Jim is a pastor's son. He attended college and received his undergraduate degree in psychology before going on to seminary. Jim is currently working at his second congregation as a pastor. In both of these churches thus far, Jim has held the title of associate pastor.

While serving at his first church, Jim said that his senior pastor was "… a good guy, a good leader." At the next church, Jim served with both a senior pastor and an associate pastor. He noted that the senior pastor was "… a dynamic leader just very, very gifted in his kind of visions, strategic thinking, all of those kinds of things." He also mentioned that the other associate pastor took a position as a senior pastor at another church during Jim's tenure there. Not long after the departure of the associate pastor, the

senior pastor also accepted a position elsewhere which started the church "… down a path of a lot of transitions."

The leadership of the church had "rallied" around the senior pastor and said, "… we still want to follow your mission and the vision that you have for the church." However, Jim acknowledged that the departure of the senior pastor to another congregation was really centered on the senior pastor's desire "to get home." Also, through the conversations Jim had with the senior pastor, he said that the senior pastor was "… starting to struggle with keeping [the church] moving forward ... he had kind of run that course."

Immediately upon the departure of the senior pastor, the church brought in an interim pastor to work with Jim but that pastor only stayed for a short while. Then, following the interim's departure, the congregation brought in a "pseudo interim" [Researcher Note: A "pseudo interim" is an individual that holds the title of interim but does very few of the normal tasks associated with that position] to assist Jim with some of the preaching responsibility. Beyond this assistance, Jim took over most of the responsibilities. Though nothing was written down for Jim with regard to his new role, he said, "… the expectations were that you're going to be kind of the glue that holds us all together and we're going to expect that you'll kind of step up." He said that "Nobody in any way shape or form made it uncomfortable at first to say, 'Hey we're expecting you to do it all,' but there was that anticipation that I would kind of hold things together if you will."

As the call process began to gather the names of candidates to possibly fill the senior pastor position, Jim said his name was in the mix. Yet, looking back on that time

he said it was "… probably not good." One of the issues was that one of the interims "really pushed that I should be this next guy." He told Jim, "You're a shoe in. You're a natural. You've got the gifts for it. You have the abilities for it." Also, Jim had several people in the congregation saying, "Hey you should be the guy. You should be the guy."

Jim said that he did not go into ministry trying to "climb the corporate ladder," but he "… had a great desire and … a real love for the people here at [church name] and so wanting to give of myself and if it were in that capacity yes I was - I was very interested in that sense." He did mention though that the former senior pastor never intentionally built him up to take the position. As a consequence of that, Jim felt that he was left "… floundering a little bit of where am I at in all of this." He said that he wanted "… to offer leadership to the congregation but I humbly was like I don't want to just assume that I'm the next guy."

After the second interim left, the congregation officially called Jim to be the interim senior pastor and then they also hired an interim associate pastor which worked under Jim. During this time the call committee continued to work through candidates for the senior pastor position. Jim said of the process, "It was a long - gray hair, loss of hair" process for him and the church which would last over several years.

Reflecting on that period, Jim said;

> So it may have led us into the dead winter … that we started to say well hey I'm serving in this position. We might as well just make me the interim senior pastor and go from there. But at the same time I was still in the mix of the call process. And I'll tell you the tension was - that was one of the worst times of my life. This was - when I look back on it what I've told people is, 'I wouldn't wish it upon anybody. But I wouldn't trade it for the world at this point because of what I see God doing and what he did in the midst of it.' It was a very, very tough time.

The congregation eventually called Jim to be the senior pastor and he declined the position. He said, "They called me but the interesting thing with this was I had the support of the - I had the popular vote but not the leadership vote." So after declining the call, the congregation called another individual who did accept the call to be the senior pastor.

The new senior pastor "wasn't a great fit" for the congregation. Jim said that he was a "… wonderful pastor, incredibly intelligent and yet he was not relational and that … one thing really kind of started to creep in … and then just kind of pull[ed] out the rug from underneath his ministry." From that point, the leadership met with both pastors and went through some various leadership evaluations which led the leadership to ask the pastors to "switch roles." The pastors agreed to the change and the congregation "overwhelmingly supported" the change as well. Of the unique situation of switching roles, Jim said, "… it was a very affirming, very positive time but it took a long time to get there and we had to go through a lot of transitions …"

Looking back on his time as an interim, Jim reflected on several different aspects of his tenure. Initially when the senior pastor took a call to a different congregation, Jim noted,

> It was interesting right when he left there was a great kind of resurgence of energy and I mean giving went way up, attendance went way up and it was kind of like people were rallying. And like a lot of things it was kind of a spike and then it started to go down. And I think where I started to see changes was because this took so long I think people started to become weary. And here's the part … that's hard for me is I think I made it harder on them by being a part of it because I made them choose even though that wasn't my desire. I made them emotionally want to support me and many of them did. And when I was extended the call I won that vote by like five votes so it was divided.

Jim continued,

> So, I look at this and say yes I learned a lot and yes … God did amazing things and I believe we're here today in a good place but I sometimes lose sleep over that honestly … I feel like I probably caused some woundedness that if I had just initially said right out of the gates I don't want this position. I want to be your associate pastor.

The former senior pastor cautioned Jim that "You're going to be lured by the people who are trying to boost you up and say you're ready for this. And yet there's going to be an undercurrent of those that say this is not right." Jim knows that there were people who were wounded and left the church, but overall he believed that the "congregation has come through it fine." He said the whole process was a "very sticky situation," but some of those people who left "have come back now because they support me."

As far as Jim's co-workers during that interim period, he said some "… were very supportive and said, 'Hey we want you to consider this and look at it. And so they started kind of looking at me for that leadership.'" Other staff members though "… were really beholden to [the former senior pastor] and his style of ministry." They challenged Jim and said, "I don't think you're the one that will be best to lead us right now." Jim does not feel like people were "negative or hurtful or anything like that," but he does feel the experience with his co-workers was definitely "a mixed bag" and a "very unrestful situation."

Upon the new senior pastor arriving, Jim said that even though he did not "know how it's going to work" he was relieved "… to finally have resolution." Jim noted that he and the new senior pastor "started a really good relationship." He felt like he had "lived in ambiguity for a number of years but … when he got here there was really hopes and high expectations that we were going to hit the ground and start going again."

Unfortunately, "… it didn't take very long for people to start to say, 'Hmm. This guy doesn't really match what we were thinking we were going to get in a senior pastor.'"

Within a few years of the arrival of the new senior pastor, the congregation began to vocalize their unhappiness with the new senior pastor to the point that something had to be done to address these concerns. Jim felt that during this time people began to start looking at him again for direction. "… to me it felt like we were in more transition. We just never settled. So there was high expectations and it kind of - the bottom dropped out a little bit underneath it."

The new senior pastor had said to the staff early on that "I see this team here working closely together." Jim said people "respected that" and it initially "was a good thing." But, as the staff "… started to struggle with his fit …" they began coming to Jim for help. Jim though told them, "Don't triangulate me into this. Don't come and just dump your laundry." His co-workers though kept saying they felt "adrift." Jim said, "… they were hoping for a good rudder and it wasn't there and so we stayed adrift …"

During this time leading up to the eventual switch of positions, Jim recounted,

> … as far as the interactions of staff and leadership I think the biggest change I saw was in the leadership of the congregation they started to say - they started to look to me … 'Oh actually we think you are the right guy. Now we know what it's like to not have the right guy. And now we're starting to see this as oh this is good.' And I told them going into this … 'I do not want you to call me as a senior pastor because I'm a warm body here and I happen to be in your opinion better than the guy that's serving as senior pastor. I want you to do it because it's the right thing to do and you're ready to go on to a ministry together.' And again [they] assured me. So I think that the biggest change was there. I saw on the lay leadership side.

Looking back on the whole experience, Jim said he was commended by others with expressions such as "I've never seen anyone stick it out like you." He said though that both he and the church had "to go through very difficult times." Also, "The easier

option would have been to leave. It was a very, very painful time for my family … I would have never guessed … I would have to walk this path."

Jim confided,

> … it was hell quite frankly. And it rocked me to the core where I was ready to quit … it was that kind of a thing where I couldn't go to sleep at night. My brain was just constantly buzzing, constantly working and I was wearing myself out. And I'll tell you what it was - there were many times when I was ready to just throw in the flag. And in fact, I thought if I could identify what I would do in the world. If I had a business that I could go into I'm not sure I wouldn't have done it.

Jim continued,

> For me personally I really learned a lot about leadership. It's like being pushed into the deep end of the pool and start swimming … throughout all of that the challenges were to me working on what does it mean to give leadership. What does it mean to work with people who are not seeing things the same way I'm seeing them and seeing the congregation through just a mine field because we had extended calls and they were declined? It was crazy …

He shared this experience as an interim and acknowledged that "… my heart is - where I sink my roots in and I love these people here …" He believed that there "… was never a bad relationship. What's been interesting is again how I believe God had to work through a lot of these transitions to get us ready …" Jim learned about himself that he was "… a collaborative style leader … I like to build teams and I like for people to have ownership in ministry and to give it away as much as I can."

Jim also believed that the time as an interim helped him to get his feet "… more on the ground of who I am as a pastor. To really be more comfortable in my skin in terms of what are my skills." He tried to be just like the former senior pastor and "exert [his] leadership," but he realized that was not his style. He said, "That's not who I am. And so I think through a lot of this it really helped me to become - it helped me understand better what are my strengths, how do I lead …"

With that said, Jim's "gut response" is that with regard to him serving as an interim that he does not "think [he] would do that again." He loved "… what God has done in the midst of it …," but if there was another way to "develop as a leader" he would opt for that path instead. He quoted the saying, "Calm seas don't make good sailors." "It's going through the rough stuff that really helps define you," Jim said but "… as hard as it was I wouldn't go through it again but I can't help but be thankful for what God has done. So there's a little tension there I guess."

In giving advice to other associate pastors who may be facing a period of transition in the senior pastor position, Jim offered a few insights. First he noted that an associate pastor has to be really "… confident of what you feel God is calling you to do because this will test every part of that." He mentioned that,

> You have to be very careful because there will be that voice … - a populist voice - and I'm not saying they're wrong - I'm just saying there will be a voice that will be like, 'You're the guy. Please do this. Lead us.' And it's very alluring … I would sit down with my key leaders and say where are you at.

Jim said next that he would advise those associate pastors "Don't be a part of the process. Don't let your name stand unless you are a clear Elijah Elisha moment." Jim believed that by putting an individual's name in the process when it is not clear if that individual is going to "carry the mantel, "It will cause division and tension … just huge caution flags all over the place." He continued, "If it's not clear don't do it. It's just not worth it."

With regard to the denomination as a whole, Jim suggested that those in the denomination's organizational leadership have a "greater sensitivity" to those congregations that have a multi-pastored staff. He said,

> I think there needs to be a real sensitivity to the impact on an associate pastor

> when the senior pastor leaves. I would like to see a more intentional process of helping a congregation and helping that pastor choose how are we going to move into this next part of our life together. I think there's things that go unsaid that are very difficult because [the congregation] want to be supportive of their pastor … [the congregation] put their pastor on [a] pedestal or at least in that special place. And so the associate pastor gets loved on and I think there has to be a real sensitivity and I would love to see some way of somebody to be trained in family systems or whatever that would say I could help assess if there was no clear direction from a senior pastor leaving what would be the next steps for you. I think there needs to be a greater sensitivity to the health of the congregation.

Jim also noted that any time people get involved in a process "there can be mistakes." At the same time he mentions that "God can use those mistakes. He promises to do that …" What Jim hopes though for the denomination's organizational leadership is they realize that these type of scenarios impact "a lot of people when you have a large congregation." Is there a "better way then what we did" when it comes to congregation working through this transitional period?

Lastly, Jim said, "I think there just has to be a better method of helping the church and the ministry" especially when it comes to helping pastors "stay healthy." Jim has heard of or known pastors who have resigned from the "stress, anxiety, [and] depression." Another pastor he knows of "just announced he's getting divorced from his wife." One of Jim's classmates also committed suicide. Jim was adamant that "Satan is active" when it comes to the lives of those working in ministry and the denomination's organizational leadership needs to be "sensitive to that." And what they are currently doing from Jim's perspective does not have any "consistency" when it comes to "… helping the church go through their transitioning."

Mason

Mason has served as a pastor in multiple congregations within the protestant denomination in which he is affiliated with. When reflecting on his life serving in the

ministry, Mason said, "To put it one way, I've been around a bit." The congregation where Mason was serving when the senior pastor position became vacant was a larger congregation with a multi-staff structure. Mason's position in the congregation was as the "youth and family pastor" and he said, "I loved it, was able to be a key part of getting their (organizational name) off the ground and going."

Mason indicated that, while the senior pastor was still at the church, "There was some discontent, discord over the direction things were or were not going, and it was a highly conflicted situation." Mason said that in the midst of that his goal was to "stick with the family and youth and let the politics go as they may until it became the point I was the only guy left and I had no choice."

Although this congregation had multiple pastors when Mason first arrived to serve there, over time and due to various circumstances, Mason found himself as the only pastor remaining following the senior pastor's departure. Mason commented, "So, pretty conflicted situation, and I was the only one … that survived it." The church brought in a vacancy pastor to assist Mason, but this individual had a medical condition that arose shortly after his arrival which prevented him from being of much assistance to Mason during this period of transition.

As the only pastor remaining, Mason was asked to "Get us through this time until we can get a senior pastor." He was asked by the congregation if he would consider being called as the senior pastor but he replied, "I don't think that's the greatest idea." Mason noted that "… very rarely can an associate transfer into a senior pastor without there being a lot of challenges. I've only seen it work a handful of times over …" Members of this congregation encouraged Mason to consider putting his name in the mix,

but he told them, "While I love to serve here … I don't believe it's proper and I don't think it would be wise to call me, so I request that you would please remove my name from consideration for senior." Some of the members of the congregation were disappointed with Mason's decision but he reminded them that, "Look, that was never my goal when I came here to someday grow into the senior position … I know the history of how this works … and it's a very difficult transition."

As far as his primary responsibilities during this time of transition, Mason mentioned that it was "preaching" and "… just trying to keep the various boards, groups, leadership somewhat focused in the midst of very chaotic times …" He assured the congregation that he was "… more than willing to step in on a definite temporary basis and do what it took to get things going."

One of the challenges that Mason experienced was the rapid change "in terms of leadership" until the senior pastor position becoming vacant. "It was just one thing after another." Mason understood that the congregation needed a "time to grieve," but he also wanted to "… keep [them] focused on the mission here." He said,

> Let's work together through this process but let's also not get so tied up in the politics and the chaos of what's happening, but let's keep focused on the mission, as that will help us move through what we're dealing with together right now.

Another challenge that Mason faced was the reality that each of the former pastors had their "loyal supporters." Many of these individuals were either "really ticked off" or "really saddened" by all of the changes, and those feelings resulted in a decrease in membership. These individuals either "… transferred out to another congregation or just flat out stopped coming, which is an unfortunate side effect of these type of events."

Even amidst the challenges, Mason also saw a lot of opportunities present themselves within the congregation during this time. He told the congregation,

> … God has not left the building. He's not left his people. He's still very active. This is an opportunity for us to redefine who we are, our mission, our purpose. Why does God have us collected as a family of his people in this particular place and community? And, what new avenues are there for us to explore?

With regard to his co-workers and the leadership of the church, Mason was fortunate to be able to build some "very tight relationships" before the period of transition began. Also, the previous senior pastor had allowed Mason to be a part of the "inner workings of the congregation" which allowed him "… the flexibility and freedom to be involved in the discussions and add my own thoughts, within reason."

During this period of transition, Mason made clear to the congregation that his main focus was still to be the "youth and family pastor." He said, "I realize we need leadership in these other areas, but my call is primarily to this specific area." When members would suggest him taking the senior pastor position he would deflect their comments and remind them that "No, we really need to focus on what the Lord has in mind for long term visionary and leading." Mason was convinced that "… unless the Lord had radically different ideas, I was not going to be the next senior."

Mason felt like he had the respect of the congregation due to the things that the family and youth ministry were doing because things were "rocking and rolling … lots of great things were happening." Because of the success of his main area of focus, the congregation knew that Mason could not "sacrifice too much … without possibly flaming out." At the same time, they did ask that Mason "… followed through with providing as much leadership as was needed to get through in the interim." The opportunity to be in such a unique position was an "eye opener" for Mason, as well as, a great chance to

"grow" as a pastor.

Early on in the call process, the call committee had Mason "directly involved in the call process." They said to Mason,

> We'd like you to be involved in this process in the interviews and all that. Not to make the decision, obviously. But so at least, you know, you're gonna be working with this gentleman, so it's important you have some type of input, say, direction, and focus as we work on this together.

Mason noted that he helped the call committee "formulate a list of questions." He helped them put together "… a list of eleven or twelve questions based upon what we think the most critical match needs for its congregation and its ministry." Along with his assistance in the call process, Mason made it clear early on in the interview process that "… I'll work with whoever comes in, and we may be polar opposites; I'm willing to work with them because it's not about me, it's not about him, it's about the ministry."

Mason considers himself a "team player" and his goal was not to "show authority or power" during the process. Instead, his desire was "How can we work as a team for the ultimate goal of the ministry in this place and this community?" He believes that the congregation respected him for that because he was firm in saying that when the new person "… comes on here as the new senior, he's the guy. He's the man. He's the one who's a senior. I work with him. We work together in the mission and ministry of this congregation."

Reflecting on his time as an interim, Mason said, "It really forced me to look inward and ask, 'Who am I as a messenger of the Gospel? What role, what ministry does God really want me to be a part of?'" He believed that the uniqueness of his time serving within this role at this particular congregation "… really prepared me for … some of the really oddball situations I've ended up in … it was a time of incredible growth."

Mason also noted that he learned the importance of listening to others and there is always "more than one side to a story." He went on to say,

> You always need to listen. Hear people out even if you think they're full of stuff, you just hear 'em out, listen, and say, "Okay, let's sit down, let's work through these things." And we may not have an answer but doggone it, at least we're gonna hear each other out, be respectful of each other, and even though we're on polar opposite sides of this equation, where can we come together and make an agreement together?

In addition, Mason realized that he was trying to take a lot of the burden on himself saying, “My weakness was I don't think I was going to the Lord enough at first ... and I quickly realized, 'You can't handle it, buddy. You know, you need the Lord there to take you through this whole thing.'" He said that, "… this is in his boat, you're just along for the ride. Just make sure you don't misdirect the boat in the process."

Mason also noted that he has always been a "workaholic" and commented, "… I was basically senior and taking over some additional classes and additional stuff, I was averaging 80 - 85 a week for that - during that period of time." God convinced him though and he realized that "… this has gotta be cut back, you're gonna kill yourself and then you're not helping anybody."

When reflecting on his preparation for the interim role, Mason said, with regard to his former senior pastor, "… I think I saw more what not to do than what to do." Mason witnessed the conflict that existed between his senior pastor and the leadership of the church and other staff members. He said, "I tried to stay out of that as much as I could, although enough to know what was going on without getting intertwined. It's a real tight balance.…" In the end, he related, "… I learned more, okay, here's probably not the best way to handle a situation like this."

Through the ups and downs of the interim journey, if faced with a similar situation in the future Mason said he "… would step right in again." "I'd have no reservations whatsoever." He has actually studied and considered becoming an "Intentional Interim" at some point "down the road."

Mason had some advice to share when thinking about other associate pastors who may be facing a similar situation with the vacancy of the senior pastor. He said,

> Number one; don't let it get to your head. Don't see it as a time to politick, to become the senior. I've seen too many cases where that's resulted in more discord, more disaster down the road. Number two; listen, listen, listen to your people. There's going to be some hurt regardless … whatever the situation; listen, listen to your people. Empathize. Hear them out. But number three and most important; keep the mission the main thing. Keep the church moving in the direction God has uniquely positioned for in that particular community. Regardless of whatever's happening around the edges. Another thing [he said,] was, "as it comes time for the interview process, be involved. This will be the man you're gonna be working with … You're working as a team … It's a team event. I sat in second chair long enough to know that … It's critical that you take part in the whole process not dominate it, but take part in the process.

When considering advice that he would offer to the denomination's organizational leadership, Mason stated, "… be sure you have a very open line of communication with the congregation and its leadership." Next he said, "Keep informed. What ends up happening sometimes is for some reason there's a disconnect and that's kinda what caused a lot of the situation …" "… also occasionally check in with whoever it is that's the fill in or you know, the associate, say, 'How's things going for you? You doing okay? … what can I pray for, for you and your congregation?'" Lastly, "… I know they're - they wanna make sure there's adequate time for issues to be worked through and - but, work with expediency ... work with your congregation."

Dustin

Dustin is a second career pastor. He worked for some time in the business world

before eventually going to seminary and becoming a pastor. Before going to seminary, Dustin served on the staff at a church while he was "transitioning" from life in the business world to the life of a seminarian. During that time, he "served as an elder," as well as, chairman of the church's call committee. Those roles gave him the opportunity to work "… with a lot of interim senior pastors" thereby giving him a unique perspective on those periods of pastoral transitions in a congregation.

The church that Dustin was serving in was noted as having "… a kind of persona or a culture and - something that's kind of all on its own." It was "very well known" within the denomination. Some of that "persona" was because the congregation "moved from their original location" into a very unique location. This move was seen as "really missional" and "thinking outside the box" within the denomination's organizational leadership.

As much as this decision to move the congregation seemed to reflect "progressive thinking" on the part of the denomination's organizational leadership, Dustin noted that "… I still realize to this day that that single move for this congregation almost killed it. Yet it's one of those things that they are known for …" Dustin continued, "… yet it's probably one of the greatest mistakes that this congregation ever made." He related that,

> … they were a neighborhood church that was really defined by the neighborhood. And they were defined as a congregation that was really in and for the local community. When they moved to where they're at today I think that they had this great vision of, 'Oh we're going to do this and it's going to do great.' And they moved in and they immediately changed the culture of the congregation … in my opinion it really sucked the life out of them. And it still in some way does.

Dustin also shared some insights into the former senior pastor of this church. He said, "The congregation here made life almost miserable for him … they didn't run him out but they made life pretty miserable for him." The senior pastor had asked Dustin, "…

from your observations am I able to lead here any longer?" to which Dustin replied, "No you're not." This seemed to be a turning point for the transition of the senior pastor and Dustin's role in serving as the interim.

Dustin did not put the "fault" completely on the congregation because the relationship between a pastor and a congregation is "a bit of a marriage." But, discussing that period he said, "… it had just gotten so bad for so many different reasons. He might be saying the right thing but nobody is listening."

Before his departure, the senior pastor came before the "… board of elders and the church counsel with a whole list of things that he's going to … he had set up a whole bunch of initiatives …" Dustin had told him, "Don't do that. You're kind of the short time guy. Right. Don't do that. Just let it go."

The senior pastor also told the church leadership that "You don't need an interim senior pastor. What you need to do is call the district and get yourself some names and start interviewing and you'll have a new senior pastor in nine months." From his own experience, Dustin thought, "That's dreaming. You're dreaming." Dustin also thought, "Okay we've got all kinds of conflict that's happening. We basically have a congregation who is antagonistic to you. And I'm thinking to myself, 'We need an (intentional) interim right.'"

Upon the departure of the senior pastor, a group of the church leadership approached Dustin and said, "… we are going to take our church back." The message from these leaders was "… we don't like the direction the senior pastor took and we're going to reclaim this. And everything that he said, everything that he said we're no longer

going to do." The leadership discarded the former senior pastor's vision document and these individuals "literally went rogue."

Dustin contacted one of the offices in the denomination's organizational leadership and said, "Look, I'm concerned about this." He went on to tell them, "We need to get an interim."

With Dustin working to assist the congregation during this time of transition, he did not receive any direction with regard to his role as the interim senior pastor. He said that "… the leadership has never been active in setting any kind of expectations … they don't have a clue what an interim senior pastor does." Instead, the mindset was more of, "… hey you're here. Great. Go." which, in turn, "… created all kinds of problems …"

A few months after the senior pastor had left, a call committee was established and people began to ask Dustin, "Why don't you just be the senior pastor?" Dustin explained further,

> I said, 'Well number one it doesn't work that way. It doesn't work that way to say well we kind of like you so you can do it. We've got to go through the process.' So, probably… I would say at least until the interim was here I was very much - I'm out. I'm totally out. I don't want any part of it okay. And the reason is because I think that that's just human nature. I think a lot of people think to themselves I just know what I see on Sunday morning. And I like the guy. He's done some good things and so let's just - let's not waste our time with a senior pastor search to only end up with Dustin and then we'll have to go through the whole thing again and get an associate if that happens and teaching him the role.

Therefore, Dustin felt like "… it does not serve the congregation well for me to just slide into that [senior] role." After a significant time of vacancy though, Dustin began to feel that he might be interested in the senior pastor position permanently if the church went through the correct process. He said,

> … I have always said that my desire is for the congregation to go through the process. If you go through the process and the Holy Spirit ends up with me then

> we need to talk. Then let's do that but if you don't go through the process then how am I or anybody else going to know whether or not God has worked through this body to bring that person here. I do not want to be the fall guy. I don't want that. I am perfectly happy and willing to serve as an associate pastor if the new senior pastor comes in I am more than happy to serve with him and any credibility or any kind of equity that I've built in the congregation I'm happy to say it now belongs to you.

Dustin did not call it a "change of heart," but he does say that his desire was to "force the congregation to embrace the process." Also, he was really encouraged by one of the denomination's organizational leaders who told him, "... your name will be nominated to the congregation and I just want you to know that I think that's a good thing." Dustin responded to this by saying, "… that's fair and … I think the Lord is leading me there to just allow my name to be part of the process."

Dustin felt that the time was right to let his name stand for consideration. He said that a year earlier he was "… trying to keep things together and I've got counsel and elders screaming, 'We're going to take our church back.' And so for me … that's where I need[ed] to be investing time. Not in should I be the senior pastor."

While serving as the interim senior pastor, Dustin felt like he had to "pump some leadership iron" because the former senior pastor never included him in "any kind of major conversation around spiritual direction of the congregation." Dustin never felt like he was a "part of that team" during that era of having the senior pastor. He even confided that the senior pastor shared with him before departing that, "You know I really haven't given you my best."

Another challenge that Dustin faced while serving in that interim role was one he "did not expect." He shared that when the congregation brought in an intentional interim

to assist during the vacancy period that he felt like he had to "babysit" this individual all the time. Dustin related,

> … it's been a real challenge because he's a bit of a bull in a china shop. And what happens is he doesn't have the relationship with the staff I do. So when he goes in and just spins everybody around they don't go talk to him they come talk to me. And so I don't just receive all of that … it's just wearing me out.

Looking at his relationship with the congregation and his co-workers during the time of vacancy, Dustin discussed a few items. He noted that his voice in the congregation as a spiritual leader went from being "significant" to gradually becoming "very significant." In addition, Dustin felt the authority in the congregation shifted and "swayed" towards him. He feels that people "… trust him in that position."

Dustin felt the whole experience had shown him "… how inadequate I am," as well as, to be careful "what you ask for." Also, he believed that his experiences helped him to "… handle things as they come in some different ways."

If he had to do it all over again he said he would because "… I have to." He continued,

> … I would rather not be in this position that I'm in. I would rather not be babysitting a (time frame) veteran pastor. I just rather would not but it is the role that God has given me and I believe it's for the benefit of his people that I step into that role. But the one thing that I think I would do different thinking back on it I would have worked tirelessly with the leadership … We determined we need an interim senior pastor. I would have tirelessly put down to set some expectations and objectives … Along with a timeline for kind of what is what are we thinking? How long do we think that this is going to take? And that was probably the biggest mistake. Because I just assumed. I just assumed … and I was wrong.

For other associate pastors who might be going through a similar process, Dustin had some advice to share,

> I would say number one do not even have a conversation with the congregation until they layout clear expectations … What are the expectations? How long am I

> going to be there? What are the outcomes that you're looking for? How will I know when those outcomes are accomplished or how far we are away from those outcomes? That's number one. I think number two and that depends on the … individual but I would say first and foremost understand that you are not the pastor. In other words it's not your role to come in and build relationships with people. It's not your role to come in and do anything other than kind of be the bad cop.

Dustin continued,

> You've got to understand this is what your role is and you don't have anything to prove …that you need to do is you need to come in and make some tough decisions. Put on your big boy pants. Get to work. Get your job done and exit.

Lastly he said, "Really be comfortable with your role." He wanted to remind other associate pastors that "… your role is to be the pastor. Nobody else is." You are the one who will be doing the "preaching, teaching, marrying and burying" during the vacancy. Also, "… distance yourself from the process of a senior pastor search. No matter whether you think you're the right guy or not the right guy or whatever."

For those serving in the higher leadership roles of the denomination's organizational structure, Dustin had some comments to share with them:

> … I believe that there is a weird phenomenon that is happening within our church body that says that the church is only valid when the pastor is present. And I think that we have over the years … elevated the role of … senior pastor … to that of CEO. And I believe that has been detrimental to congregations.

Dustin continued,

> We need a senior pastor because we're not fully church until we have a senior pastor. Like we're not full - like we can't move forward in the mission of the gospel until we have all of our ducks in a row … And I see that a lot of these interim times I believe challenges that the senior pastors especially have not done … that is to equip the saints for the work of ministry. So when the senior pastor leaves guess what happened. We don't know what's going to happen. What do we do now? Well I think that when you elevate the pastor to the point of saying well he's the only one that has good ideas. He's the only one that can make decisions he's the only one that can do anything right … it cripples congregations [and] … if we were to equip … not just pastors … [but] engage the body of Christ and to equip them for the work of ministry I look forward to a day where I leave

> … and they say, 'Who was that again?' I mean I really do. I think where my voice is just one of many at the table and it doesn't carry with it this like ultimatum. And I know it does. It's not because I've asked for it. It's not because I've demanded it. It's just because that's part of our culture I think … to me our [denomination], our church body really has to do a better job of helping pastors understand what is their role when it comes to word and sacrament ministry.

Chad

Chad grew up working in churches as a musician when he was in high school. He met his wife at one of the churches he was working at. Her grandfather was a pastor in a different protestant denomination and as Chad and his wife-to-be "started to talk about getting married" they began looking at being involved in a church within this protestant denomination. The church that they settled on was "looking for a music director" and so they hired Chad and this was the start of his journey within this denomination.

About 10 years later, Chad was serving at another congregation when "… one of the pastors asked me had I ever thought about being a pastor." Chad said, "Well I'd be lying if I said no …" but because of family issues "I can't go to [seminary] or whatever." The pastor suggested to him a new program within the denomination in which individuals such as Chad could do their study and training at their current congregation. Of that experience, Chad recalled that "… it really was a blessing that I got to stay and serve the congregation …"

Two years into the program, that church closed and so the denomination's organizational leadership "… looked for a place for me to go." Not too long after that, Chad got called to a church that was not too far away. The senior pastor of that congregation was going on "temporary disability" and they asked Chad if he would be "willing to substitute." Unbeknownst to Chad was that shortly after he began working at

that congregation, the senior pastor would have a psychological episode "in front of the entire church" which led to his eventual removal.

The actual removal of the senior pastor took several months because of the denomination's organizational process. Chad noted though that "… in the meantime [the senior pastor] had already moved out of the office. I mean essentially had abandoned post." The church really liked Chad and so their "immediate resolution" was to move him from being a "substitute" that was still in training to being their associate pastor.

Chad spoke very highly of this congregation. He said, "… this place is just phenomenal. I love the people here. Of the…different churches that I've served as a leader, head and shoulders this is the way a church should act."

The congregation, in general, has an "older group" with a "… number of people … who were here when the church began." The church also has a school which leads to a mix of congregants at "every age level." Chad said that the strength of the congregation was "… when people walk in the door you are extremely good about making them feel welcome, loving them, etcetera …" He added, "In a time where everything is so impersonal they're very personal."

Upon the removal of the senior pastor, Chad said he was given "full power" with regard to the senior pastor position though at the time he was still officially a pastor in training. The only area Chad felt like he was not given power "… was planning ahead because I didn't know for a year and a half what was going to happen." Eventually, Chad became a pastor and was called by the congregation at which point "… the elders were very clear that you are now the guy until we call [a senior pastor]."

As a consequence of the program that Chad went through to become a pastor, he was "… not allowed to be a senior pastor." He noted that, "… I was called essentially as an associate or I could be a sole pastor but not as a senior." There were members in his congregation that wanted him to be the senior pastor, but Chad said that he always thought of himself as "… Robin to whoever is going to be Batman."

As the call process began to unfold to bring in a senior pastor, there was a group within the congregation that said, "Hey we've got a great pastor … We've got a guy. Let's find somebody that can help him." There were suggestions to bring in someone else that was not a pastor so Chad could become the sole pastor of the congregation. Yet, Chad noted that "… the congregation had voted to go to two pastors. So that's where we're at at this time …"

During this process, Chad noted some of the challenges that he faced. He said,

> Originally I came in to do status quo, what was already here. Some of the status quo was poor and to make it better and as you start to … build relationships with people then they will garner that trust in order to make things better. Things like our website like a social presence on social media … Trying to be everything for everyone. They have been very understanding that I can't do it all because I'm just one person and with the school and with the older people and shut in's and stuff - and I'm doing what I can - some days are easier than others. I've definitely done more funerals than ever before that's just sort of - I think that's the nature of the beast anyway.

Chad also mentioned the challenge of some people pushing an agenda knowing that he will not be the senior pastor. He said,

> I think there are a couple people that want their agenda of and I'll use the term traditional versus contemporary. I love traditional. I'm also equipped to do contemporary. So we do a blend of everything which I think is really what a lot of the people want but some people just [prefer you] chant for two hours. Not that I'm against that … I have no issue with that but I think there's some people that want to go back to the early 70s which is not the way to go to bring new people in. But yeah I think there is some that look beyond me. A select few. I could probably put them on one hand.

Even amongst the challenges, Chad said, "… I think everything in one aspect or another has been rewarding where I have learned this or I have learned don't do this …" He added, "I know that I need some guidance with somebody who has been a pastor longer. That would be helpful to me."

Reflecting on not being able to receive the senior pastor call, Chad said, "I have mixed feelings on it because I don't know what I'm going to get but I know that I love the people here." Chad continued, "…it's what God decides…" Regardless of the decision, Chad confessed, "It's too much for one person. I know this. I'm living it. It's too much for one person. You can't be at all this stuff and have a family."

Chad felt that some of his "trepidation" of getting a senior pastor was based on an earlier experience he had with his senior pastor at another congregation. He said, "… they called the new senior pastor. And he started to slowly clear the old people away. The old staff. And then all of a sudden I got blindsided out of left field." Now that he felt like he was "back home" and "found a place to be" it was "unsettling not knowing what's coming in."

Going through this experience, Chad felt like the whole process "… put me where God wants me to be." Because of the different issues he had to deal with in the past, Chad was cautious of "the snake in the grass" in his current congregation. He believed that everything he went through prepared him to handle the situation with his senior pastor and "other kinds of conflict" that have emerged in conjunction with the senior pastor dilemma. Looking back Chad said, "…God's no fool … I am where I am supposed to be."

Knowing what he knows now about how the situation would unravel with his senior pastor, Chad said in a "heartbeat" he would do it all over again. His thought from the beginning of serving this congregation was "What can I do to help the congregation?" He said that "… whatever the case may be I'll help people when I can." He also mentioned that if he were serving another congregation and a similar situation ever presented itself where there is a period of transition in the senior pastor position that he would definitely step in to help. He said, "We are in this together … if that new congregation were to say, 'Hey we need you to step in until we find someone or whatever the case may be' … If you're with me I'm willing to try it."

When Chad considered the advice he would give to other associate pastors that might be facing these types of transition periods, he mentioned,

> Communicate first of all with your people, with your leaders because if you're communicating …then you're going to have a much better relationship so that when something is needed you can work together … some churches … think the pastor has to do it all. And that's not the case. The pastor is being called to equip the saints … The biggest thing is communication.

Chad then mentioned that the associate should "… always be in prayer. Always." He gave an example by saying, "God show me what you want me to do today. And help me to get done whatever needs to be done and help me to understand that the things that are left till tomorrow can keep till tomorrow."

Lastly, Chad went back to the idea of communication and making sure that the pastor did not forget the need for love with their words. He said,

> … I'm going to go back to the communication thing … my parents owned a business when I was growing up and one of the first things that they taught me was that the customer may not always be right but they're always the customer. So that mentality which no longer really exists very much in this world, that's part of loving someone. You may not like the person. You make think he's a total

> idiot but none the less you're called to love that person. You're called to deal with them in love."

Also, Chad related,

> There are times it's difficult. But communicating in love, and that's not sending emails, that's honest to God as much as you can get face to face, pick up a phone, whatever kind of communication. That's how Jesus did it. Go back to the basics and remember Jesus did it face to face in this world … Skype is cool but it's not the same thing as being able to hug somebody or shake their hand … And sometimes that's all you can do. When you've got a bunch of people who are coming home from the hospital or whatever and you can't see everybody you call them and check on them. Pick up the phone.... And, then have confidence that Christ is always going to equip you to do what you need to do. And don't try to do it like the other guy because you're not … honor the traditions … what the congregation is used to … Honor them but don't be exactly like them.

In conclusion, Chad commented on what he would share with the denomination's organizational leadership with regard to how they can assist pastors and congregations during these difficult times of transition. Chad said,

> Each congregation is different remember that. Each congregation is its own body. It has its own personality and that personality can change depending upon who is at the top …Whoever the pastor is. And get to know that personality. That personality will change if you think about any particular person … One of those people that have effected what they do is gone. That's going to happen with the congregation and be willing to listen. Be willing to flex with that. You have to be flexible … Find out where they are and love them … I don't think everybody does that. And I honestly don't think … there's not a cookie cutter approach that works.

Laurence

Laurence grew up in the protestant denomination in which he currently serves as a pastor. Both of his parents were professional church workers and so Laurence said that he had "… been around a lot of different congregations" during his life. As a pastor though, Laurence has only served in one congregation.

Laurence described the congregation in which he is serving as an "aging congregation." They are connected with the denomination's school association so they

have a "good segment" of those families involved. He feels that they "… are starting to reach out more to other younger families and younger individuals in the last couple years" but, overall Laurence feels that his congregation mirrors the "demographic" of many of the congregations within the denomination.

Shortly after his arrival to serve at this congregation, the senior pastor had Laurence and wife over for dinner. During their conversations, Laurence said "… one of the first things he told me was, 'Hey, [specific timeframe] I'm probably retiring here.'" Laurence went on to say,

> Yeah, he was at that age. He'd set himself a goal of [specific timeframe] in the ministry, and he made that pretty much on the dot … he enjoyed certain aspects of ministry still, but there were some aspects he was just getting tired of, and he made his goal … "I can retire, and I met my goal, so let's do it."

After the retirement of the senior pastor, Laurence noted that there was not a "formal conversation" with regard to what his new responsibilities would be at the church. He continued,

> I think it was just largely understood. There were probably some conversations at the elders level and perhaps the executive committee level, "Okay, what kinds of things that [former senior pastor] did still need to carry on, things like worship, schedule planning, things like that? What sorta things can be dropped?" But they largely left some of those decisions up to me in terms of what I felt comfortable taking on and working with them to – because they would have input, too, as to what needed to carry on, what didn't … there were some expectations and things that we realized still needed to be met, and ministry obviously needed to carry on the basics of preaching, teaching, visiting the sick and the shut-in, things like that.

Laurence continued,

> So yeah, we had just kind of finished a round of long-range planning, too, which I think helped give us a little bit of a vision for things that we could continue to do within there. And then it was always my hope, as you move forward, that it would be a time that congregational leadership would perhaps step forward a little more and be strengthened and encouraged, saying, "Yeah, it's not something the pastor has to do. Well, maybe it's something we can do, in terms of moving that

> vision and things forward." But there weren't any formal conversations or discussions that I remember.

Laurence also mentioned that no timeframe was given to him with regard to the length of time he would be filling this role except "… so far as understanding the timeframe of the call process." He did note that one benefit that the congregation had was a "jumpstart" on the call process because they knew the timeframe in which the senior pastor would retire.

The congregation realized they "… didn't wanna do things too quickly because … some sort of a gap there would be healthy and helpful for the congregation." Though there was an understanding that there would be "a gap," Laurence said that people still "… wanted to move forward, knowing that one way or the other we were gonna have to fill a pastoral position here, because the size and the congregation and just the ministry demands needed it."

With the call process beginning, Laurence noted that there were "a lot of conversations" about whether he would consider allowing his name to be up for consideration for the senior pastor position. He had received several positive comments from congregation members that were "encouraging and heartening."

Even with the support, Laurence said he "… felt most comfortable with the process being a congregational decision." He said, "I'm not gonna put my name in. If my name gets put in, I'll let it stand … I'm open to God's calling and leading wherever he leads." With that mindset, Laurence "… left a lot of it in the hands of the call committee."

Laurence noted that the congregation "… had a past history of this similar situation happening, where the associate pastor really wanted the senior pastor call and

didn't get it, so some feelings were hurt.…" He went on to say that this associate pastor soon after took a call elsewhere "And so I think there was some apprehension and tension and maybe fear on the congregation's part that the same thing would happen."

As a result of the previous scenario, Laurence was "up front with the call committee" and told them, "My feelings won't be hurt. This won't affect me one way or the other if you decide not to recommend my name for the call. I'm perfectly happy and content and feel God has more things for me to do in this position." He hoped to "allay" any fears that the call committee might have that the previous scenario could happen again.

At the prospect of possibly being the senior pastor, Laurence said, "I would've been honored and humbled that the congregation would've put such trust and faith in me at that time." He also confessed, "… I could've done an adequate job perhaps, but I didn't see my skill set and abilities fitting in with that position here at that time." He was not sure if those feelings were of "… inadequacy on my part or truly understanding the situation and assessing my own … skills and God-given abilities and desires for ministry at that point …" He realized that he "… had perhaps some growing to do." Laurence added, "I was actually more excited about the possibility of seeing a different perspective on the senior pastor role than taking over that myself at that point."

Eventually, the call committee came to the same point that Laurence was at in that they believed "… that my skills, my abilities, my ability to minister to people here as the associate pastor … would be more suited to that position within the congregation than the senior pastor." The call committee conducted several interviews and finally called an

individual to be the senior pastor to which he accepted the position. Laurence said of the process, "… we could just tell God's hand in the whole process."

Looking back over his time in the interim position, Laurence said there were challenges for some of the members with items he "… hadn't had to deal with before." The most notable challenge though was "… both trying to maintain the ministry we had, but also try to move the congregation forward … to keep some momentum going … so that we weren't a totally stagnant place when a new pastor arrived."

From the vantage point of the congregation, Laurence felt that he was not treated "any differently" during the transitional period. He believed that the congregation had a "high respect" for the pastoral office "… so there wasn't any real way that they could've, I don't think, increased their treatment of me." Laurence received "many encouraging words" during this period and members in the congregation told him "… they could see how [he] grew and just was able to step up … holding things together for them and … just growing as a preacher or teacher or just pastor in general …"

His relationship with the staff during this period was "more challenging." Laurence noted that it was difficult being the "go-to guy" when there was "… tension in the office or problems between other staff and other members of the congregation …" He also had to serve as the "staff liaison" with the call committee once his name was removed from consideration which he found to be a struggle attempting to keep the "… staff's interests in mind." There was especially some "fear and trepidation" from some of the staff because they were unsure of how their positions would be impacted with the arrival of the new senior pastor.

The whole transitional period gave Laurence an "… appreciation for the position and just the tensions and burdens that can be placed on an administrative pastor in a larger congregation …" He continued,

> So it was a very humbling experience, and I would say just the increased practice in preaching and teaching helped me grow in those aspects a lot more. And I think my sense of how the senior pastor can and does set the tone and the vision, as much as I like to see it and think of it as a servant leadership … the shepherd has to know how to go and know where to go and how to lead the flock after Jesus and be able to put that before people time and time again, and seeing that responsibility from that position, were some ways that I think I grew in that time.

Upon the arrival of the senior pastor, Laurence said he felt "comfortable" with the new pastor and it was a "relief" to be able to focus back on those areas of ministry that he enjoyed like "… developing some more of the family ministry type things that I had done." The congregation "embraced" the new senior pastor and "immediately began going to him" for their various needs. Laurence felt that his work with the congregation prior to the new senior pastor coming "prepared them" for this change.

Also, with the staff, Laurence felt that he had become more of a "confidant" now that he has returned to his former position. He said, "… there was an increased level of comfort and respect and just openness there, in some ways because of the transitional period."

Looking at how the experience impacted him personally, Laurence said it was a "humbling time," as well as, "a time of reflection." He said that his eyes were "more wide open" especially when considering "… the weight of responsibility that … a sole pastor or a senior pastor as someone people look to be able to help them deal with issues and help them solve problems and be able to reconcile relationships together."

He continued,

> … I probably was encouraged in myself that, okay, with God's help, I actually could maybe do this. I still see that I would need a lot of growth and forgiveness from the congregation as we kinda stumble forward together, but know, okay, I can do this in God's grace, and I feel like I learned a lot in that time … I think I did grow in just my sense of understanding of that unique office.

Laurence said that his experience was a "trial by fire." His former senior pastor could have done a better job of "progressively" teaching him how to do some of the required "administrative tasks." Laurence said that if it was going "to be on my plate anyway," having the opportunity to work with those tasks before the senior pastor retired would have been helpful.

Knowing what he knows now, Laurence said if the situation happened again he would not "run from it" but it would not be his "choice." He said, "I see God's hand at work in the whole process … it was a time of growth and eye-opening for me." It was not an "ideal situation" but he believed that he "gained valuable experience" from the process. Laurence noted that he would "feel more prepared, more capable" if he ever encountered a similar situation and "hopefully lead that congregation to an even healthier position than before."

When asked what advice he would give to other associate pastors that might be experiencing a period of transition within the senior pastor position, Laurence said, "… you can't do it all. You can be pastor, but you can't be two pastors." He added,

> I think there's always a segment of the congregation that kind of expects both roles to be filled completely by the one pastor, and all that was done will just continue to be done, and we'll work you to the ground, but how do we set manageable expectations for what we're asking this one man to do, and what are some ways we can rise up and assist with things? What are some ways we can get in some help? … don't be afraid to ask for help … Don't expect that you can do it all. Don't let your congregation expect you can do it all, but work to figure out together what you can do together. What can you do? What can you take on? What areas … might have to be on hold? And always look with that vision, … especially once you come to the point where you know that you aren't going to

> receive the call for senior pastor, how do you help the congregation prepare for the new person?

Laurence continued,

> How are we prepared to be flexible and, within our personalities as a staff and as a congregation, be open to this new type of servant leadership that we're calling? … how do we as a staff honor that and be prepared to work with that as best we can? And just tell the congregation, yeah, there's no guarantees that we necessarily gel and mesh. We can pray that that works together. We as a staff are committed to trying to help that work together, but let's not make decisions based on fear; let's make decisions based on trust in our Lord Jesus Christ, knowing that he's the Lord of the church.

When Laurence considered the advice he would give to the denomination's organizational leadership with regard to these transitional periods, his first suggestion was that they have "… more points of contact with the congregation …" throughout the process. Also, he noted the benefit of explaining the "transition time" better and assisting the congregation in how they "… can prepare and step up and be ready for the new pastor." He concluded with the need for the leadership to make "themselves available" to explain potential "challenges," as well as, "… opportunities and some expectations and maybe boundary-setting … exercises for the congregation to work through … to guard not only the pastor but also the congregation in their expectations of the pastor in that time."

Austin

Austin is serving as the pastor at a mid-size congregation within the protestant denomination which he is a member. The congregation is situated in an "urban setting" surrounded by a very rural area. The city in which he serves is "fast-growing" and the area has become a "major immigrant community." The congregation is very engaged within the immigrant community which has led to some "unique ministry" opportunities.

The congregation is also connected with two of the parochial schools in the area. All of this led Austin to say, "We're a midsize congregation, but sometimes it almost feels like we're bigger than that because of all the other factors."

A few years into his ministry at this congregation, the senior pastor took a position within the denomination's organizational leadership. The transition of the senior pastor was one that the congregation was "prepared for" as they had been anticipating the change "… for a long time before it happened."

Before his departure, the senior pastor was very pro-active in putting "things in writing," as well as, initiating "meetings and so forth" to assist the congregation leading up to the transition. During this period, Austin said that three of the congregational leaders took him out to lunch and asked him, "So what do you wanna be after this?" In addition, at one of the congregational voter's meetings the leadership laid out a timeframe that by their next voter's meeting there would be a plan in place for the transition. In other words, "… it was understood that we'd have to begin some sort of call process no matter what."

During the vacancy and in between the two voter's meeting, the congregation took a "self-study survey." The leaders of the congregation also added "… another page to the survey, specific to our situation …" This additional page was really focused on whether the congregation envisioned Austin "as senior pastor or associate pastor." Austin noted that the additional page "… boosted participation in the survey knowing that it gave people a chance to have a direct voice in that."

Austin thought that the leaders were "… expecting a pretty overwhelming, 'Yeah, Austin's gonna be the new senior pastor …'" The results of the survey though were

actually "pretty split." There was a "slight majority" that said they wanted Austin to be the senior pastor. With these results, Austin said it gave him a "… snapshot of where our members thought we should go."

Not long after the survey, Austin said he had a clear "Take me out of the senior pastor thing" moment. He called the head elder of the church and told him, "I want my name out of the running." Being a few months into the vacancy "opened" his eyes. He said that he "… had no idea what all went on …" and that time of serving solo "changed [his] mind."

Austin said he felt a pressure from some who said, "We really hope you're gonna do this." He believed a lot of that was due to the fact that he and the former senior pastor "… were pretty similar in a lot of ways in terms of personality and leadership style …" Austin continued,

> I think one of the reasons that the senior pastor thing was being pushed my direction was, "You're just like your predecessor," almost with the idea that "The congregation will just stay exactly the way it is if you're senior pastor." I didn't really like that either. I didn't mind being compared to him because he's a great pastor, but I didn't like that mindset that, "Well, if you're senior pastor, everything's gonna remain the same."

He continued,

> People didn't seem to understand that that would be a change … I mean, certainly calling from the field is a big change, but it would still be a change if I had become senior pastor. A lot of people didn't seem to realize that. So that concerned me because I kinda felt like I was being boxed into a, "You're just gonna do things exactly the way they have been, right?" And I had some – not serious concerns but just it gave me food for thought.

As he served in the vacancy period, Austin reflected on some of the opportunities and challenges that he encountered. He celebrated some of the "new mission projects" that those in his congregation started. Austin was especially thankful for a grant that his

church drafted an application for and received to impact their community. They utilized the grant money to support a "local homeless shelter," an "affordable housing project" for seniors, and then "meals and a medical clinic at the homeless shelter …" Austin stated, "… it's just been neat to see some of our lay people realize, 'Okay. We can't fall back on the pastor to do that stuff right now, so we're just gonna do it.' It's blossomed into some neat stuff."

Austin also highlighted the church's work with the "Christian refugees" in the area. These individuals have come from areas that are "dangerous" for Christians. Austin said his role was minimal, but he did give the individuals "permission" to utilize the church for worship "… in [their] own language" and the congregation has been "supportive of them in doing that." Austin commented that it has been "… a neat development this year, that I've just kinda gotten to be a part of something new with them that our previous pastor didn't get to be part of."

In a broad sense, Austin believed that the period of vacancy had "… been an opportunity for me to grow and grow through a lot of experiences …" He said he was able to "… gain a lot of confidence and experience of those things that I didn't have before."

As for challenges, Austin noted that the previous senior pastor was the "decision maker." He was the "point person for everything" and he just "… kept taking and taking and taking so many things on his plate." Austin said that he "… seemed to have so many plates spinning in the air at one time that – it was kind of a magic act …" He continued, "He didn't delegate a whole lot. He was kind of a, 'If I wanna get it done, I'll just do it

myself.'" Austin realized and yet did not realize how much the senior pastor truly handled until after he left.

With the leadership style of the former senior pastor, it impacted the "leadership structure" and "decision making" of the congregation. This proved a huge challenge for Austin and the congregation after he left because they began to realize that, "Wow, we've gotta change our bylaws. We gotta change our leadership structure. We've gotta look at elders or council, and all these kinda things, like what their responsibilities are."

Austin said it also challenged the congregation to look at their staffing structure because they are currently well "understaffed." The church has two "retired pastors" that help out as needed. Austin said they are "… what is standing between me and complete burnout … If I didn't have them, this would just not be possible. They've been a huge blessing."

Serving as the pastor during this vacancy period, Austin had noticed how members in the congregation are treating him differently. He said, "I've seen changes with some members … people asking me questions, coming to me for things that they never would've approached me for before. They would've gone up the ladder to the senior pastor, I guess." For the most part, he said that he is "… looked to as a senior pastor-type role right now …"

When he pondered if he regretted taking his name out of consideration for the senior pastor position, Austin mentioned that he liked "… to have a seat at the table when decisions are made.…" He said, "… I have a certain vision for the congregation going forward. There's part of me that would say, yeah, I'd like to be that guy, but under different circumstances, maybe." He continued,

> So, yeah, there's part of me that thinks about the senior pastor role, but I'm also very – I'm very much okay with another guy coming in, too. I'm not – that doesn't bother me. The guy that's currently considering the call, if he would accept it, my impression is we would have a really good relationship. He told me that he sees an associate and a senior pastor as being on equal footing. It's just that one guy has to kinda be the accountable party. And he said that's about it. So if a guy like that comes in, who's willing to listen and involve me, then I'm fine with that.

Austin does not feel that the process has had a "negative impact" on him. He felt like he had been "thrown into the ring" and he had to be ready to "face whatever" came his way. He felt that he had "grown a lot." Austin said that, "… I'm definitely at a different place now … it's given me a lot of new ideas and a lot of new perspectives."

The experience had also given Austin an opportunity "to see how the call processes work." In addition, he had to "make a lot of solo leadership kind of decisions and things." He felt like he was at a congregation where he and his family were "cared for and fairly compensated" so he was not too worried about future because he was in a place where was still "gaining experience."

One thing that Austin wished that he would have done better is at the beginning he would have pushed for was, "Let's get this senior pastor calling process moving." Austin believed there was a feeling in the congregation that, "Well, we're such a great congregation. We'll just get another pastor right away." They did not understand the "process" nor the "timeline."

Austin felt that if such a situation ever occurred again it would be a lot "more natural the second time around." He does prefer to "teach and preach every week" so he does not see himself in an associate role again. He sees himself more as a "sole pastor" in the future.

If he were to give advice to other associate pastors facing a similar situation, Austin had several issues to share,

> Don't put added pressure on yourself to live up to your predecessor's expectations. You'll feel enough of that pressure already from the congregation, potentially, if you're following a good pastor… Don't put all the pressure on yourself because that burden gets really heavy. And, along with that, don't try to be a hero and figure everything out, or solve everything, or get everything done … I think, looking back … I tried to do too much. I've said yes to too much, and it's worn me out.

Austin continued,

> … the tough thing is that I've taken on a lot. I guess because I felt like I had to, because I felt like the congregation needed me to. And looking back, I should've said no more. I should've made ways, found ways to delegate more, and if I got no for an answer, I should've kept pushing rather than just saying, "Well, no one else is gonna do it, so I'll do it myself," 'cause that's what my predecessor did, and I'm having to be careful with that … I guess if I put my advice in a nutshell, it would just be don't try to be a hero. Don't try to do it all yourself. Focus on the main things, but actually let some things slide.

If given the opportunity to influence the process at the higher leadership level of the denomination's organizational structure, Austin had several more insights to share. He said,

> I guess it would just come back to transitions matters … I don't think our call process and the [denomination's leadership] should prevent us from having smart transitions…What are just practical, wise ways of handling transition, whether it's pastoral, whether it's mission workers' … "Let's be smart about how we approach transitions."

Austin also stated that, "… it seems like our only succession plan for most congregations … is a guy takes a call, he cuts all ties, he leaves. And that's it." The problem with that is that "… when a guy who had been handling virtually everything cuts all ties and leaves, it just leaves a congregation just sort of dizzy …"The congregation is then left with the feeling of, "Wow. We had no idea who did all these things," or, "We've

never had to think about these things before because he always did it for us." Austin concluded, "… we don't think enough about transition."

Joey

Joey is a graduate from one of the universities affiliated with the protestant denomination in which he now serves as a pastor. He initially served in the capacity of a congregational outreach minister for a time and then as a teacher before eventually attending seminary to become a pastor.

The first church Joey served at he described as "… a fairly affluent congregation, middle class, upper middle class folks, mostly Caucasian professionals, higher income kind of folks." He also noted that the church had a school attached to it and was in the process of moving to a new building around the time of his arrival.

Joey was called by the congregation as the associate pastor but shortly after his arrival the senior pastor left to honor some commitments he had with (another organization). This temporary departure placed Joey in the role of "acting senior pastor" very early on in his ministry. He claimed that it was a "very challenging" time, as well as, an "educational time." He had to serve a "rather large congregation with a school, and we were transitioning from our facility. So I was there and oversaw the congregation as we moved from one location to the next and got worships started up."

The senior pastor eventually returned from his commitments, but then shared with the congregational leadership that he had had "an inappropriate relationship with a woman." As a consequence of this, "he had to resign his call" which he did "gracefully" and "without any sort of recalcitrance or any sort of resistance at all."

This placed Joey back into the role of "acting senior pastor" as the congregation

began the process of "looking for a new senior pastor." This was also a "complex and difficult" time as Joey worked with the congregation as they dealt with their "grief and the brokenness" of the situation. He said there were "a lot of challenging issues that had to be addressed after that all came out." He added, "we had to deal with just the resignation, sharing it with the congregation, and then rebuilding, and deciding what we wanted to do moving forward."

With Joey filling in again during this vacancy period, the congregational leadership asked him to "stick with the status quo." Joey said he knew some items that he wanted "… to do with the congregation in terms of healing, and reaching out, and just making things available to them." For the most part though, the congregational leadership just wanted "smooth sailing."

Moving forward to fill the senior pastor position permanently became "an issue of some disagreement." There were some who felt that "Okay well we need to find another pastor here. We need to find a senior pastor." Others, including some of the leadership from the denomination's organizational structure, said that "First of all we don't want to jump in to a new pastor; that just would not be healthy." Joey equated this to it being "… the same way as when you get divorced or break up with someone you're dating; you don't start a new relationship the next weekend."

Joey commented,

> You need time to process … before you can receive a new pastor in a God pleasing healthy fashion. That was my coaching; that was my encouragement … "Let's wait." Unfortunately the leadership did not agree with that philosophy … I think some of the leadership had in mind that it was going to be a number of months before we got a new pastor … I was saying, "No this is gonna take some time and it's good that it's going to take some time" … Like I said, there were differing opinions on that point.

With regard to Joey becoming the senior pastor, he did not recall "if anyone in leadership suggested it." He did have some of the members who asked him about it and suggested that he "might consider" the position. As far as the leadership of the congregation, Joey said, "… none of the leadership that I remember said, 'Hey we think you ought to be our new senior pastor.'"

When asked if he thought he could be the senior pastor, Joey responded, "Yeah I thought so." He believed that his experience as "a missionary, and a school teacher, and an outreach minister before coming in to the ministry" were fairly significant. He stated, "It wasn't as if I was 24 years old just coming out of the seminary." He had "other background and other experiences … Aside from the fact that I had guided the congregation through a move successfully … [and] had helped the congregation after [the senior pastor's] resignation. Joey felt like he "had demonstrated that I could do this kind of work." Therefore, when the first round of the call process began he did submit his name "as a candidate to be considered."

The call committee conducted several interviews and then narrowed down their recommendations to three candidates, one of them being Joey. The call committee brought the three names before the congregation to be voted on. One of the candidates, not Joey, fell just shy of the threshold needed to officially receive the call from the congregation.

Joey said he received "36 percent" of the vote and one of the other candidates received "64 percent." Joey added, "… it was just barely not enough for this other candidate to get a call from the church." Joey had "enough support and votes" to make it "impossible" for the other candidate to receive the call.

As a result of this vote, Joey recalled "… representatives of the Call Committee approached me and asked if I would consider withdrawing from the running so that another vote could be cast and a decision could be made in that regard." So Joey removed his name from consideration and "stepped away" from the process and was no longer "a part of the running anymore after that." The other candidate received the call but shortly after declined the offer.

The congregation eventually called three individuals for the senior pastor position before their call was accepted by a pastor. When Joey considered the fact that he was "passed over" three times for the position, he noted that it was a "complex experience." He said that he was "frustrated" initially, but he realized, "Okay this isn't what God wants." Joey did wonder, "'What exactly was it that they found so unpalatable or unsatisfactory?' I still don't really know. But I knew at that point that, 'Okay God is not calling me to do this.'"

Joey continued,

> God has something else in mind and I have to trust in that process. There was a point – let me put it this way; I think that I always had strong support in the congregation. In other words I felt like everyone always thought, "Joey is a solid pastor, and we like having him here, we don't want him to go." In addition to that there was always a group too that felt like, "We want him to be our senior pastor." Once we had two candidates who were given a call but then said, "No," then there were some folks in the congregation who said, "Hey maybe we ought to put Joey back on the docket. Maybe we ought to make him a candidate again."

Also,

> So the president of the congregation … asked me, he says, "You know Pastor, a number of people have asked that maybe we ought to put you in the running again. What do you think about that?" I said, "No I'm nobody's third choice," and my feeling on that was if they didn't see something that they liked the first time, I don't want to be somebody's third choice around. In other words, "Well if we can't find anybody better I guess we'll go with Joey." That quite honestly was a

> point of pride … I said, "No," and I honored that choice. I think that was the best choice …

Reflecting on that period of transition, Joey noted that he was "proud" that he was able to assist the congregation in moving "… from one ministry site to a new site, a whole brand new building, new structure, new layout, and getting ministry going again." Also, he was glad that after the senior pastor's resignation "… almost everyone stayed as part of the church, stayed in worship, stayed with what was going on."

Joey felt like "… the Lord used me in a good way to keep things together … I felt like that was an accomplishment, that the congregation was still cohesive; ministry went on … that was a great accomplishment to do that." He also highlighted "mission work," outreach," and some "other stuff" that he felt that the congregation was able to do well during that period of vacancy. He was able to deliver "… the congregation to a new senior pastor in a very healthy and strong condition."

As far as challenges, Joey noted that he "… bore the responsibility of being senior pastor without having the commensurate respect of being the senior pastor." He felt that he had to "… push and work at doing certain things without the natural sense of respect that a … normal senior pastor would enjoy." Joey added, "I was doing the work of a senior pastor; I had all the responsibility of a senior pastor … But then at the same time there was still this sense of, 'Oh well he's just Associate Pastor Joey.'"

Joey said that in many ways "there was no transition at all." People just assumed that, "You're our pastor now and we're comfortable with that." Other members though took out their "grieving" and feelings of "betrayal" on Joey since he was the only pastor remaining after the senior pastor resigned.

Joey's co-workers seem to accept the transition because they understood that "…

there was a difference now …" Whereas Joey used to be a "colleague" now he was in more of a "supervisory role." He strived to be "nurturing" and lead by "supporting" to which he felt the staff "responded well." He did not "sense any resistance" and he felt like they "accepted" the change that was happening.

Looking at how the experience impacted him personally, Joey noted there was a variety of "practical stuff" that came from that period of transition. Besides preaching "a lot," he found himself "working in God's Word all the time" which he considered very "beneficial," as well as, being engaged with "visits, shut-ins, and Bible study preparation." Joey also said he is more of a "reflective" personality and he likes to "… spend as much time as I can on making decisions." Yet, because of the breadth of items he needed to accomplish, he improved at "… trusting myself to just say, 'Okay here's what we're gonna do.'"

Joey also noted that there was a sense of "relief" when he was able to move back to his former role as the associate pastor. He felt that he could "… focus on other things now. I can step back a little bit." He was "happy being the acting senior pastor" but he was also "happy being the associate."

Moving from the "practical stuff" to something deeper, Joey shared how the experience impacted his perception of himself. He said,

> It really took a constant kind of reaffirmation and kind of reinforcing with myself that, 'Okay this congregation may not have seen what I thought they should have.' But you have to trust the process, and I thought, 'Okay clearly God has something else in mind here, and I need to respect that. I need to submit to what God is doing and to the plan that God has.' But there was definitely some frustration …

He continued,

> … I think on one hand I think it's difficult for people to accept someone in one role and then accept them in a new role; I think that's part of it. It may also be

> that emotionally and spiritually they associated me with the pastor that had to resign, and maybe just wanted to purge. I think a lot of it had to do … I think there was some degree of orchestration in the process. In other words I don't think the playing field was level when I was considered as a candidate.

Overall, Joey felt that his experience "was overwhelmingly positive." Yet, he acknowledged that "Part of our sinful nature is that we tend to ruminate on the negative as opposed to the positive." He believed that he had more "to be thankful for and to be joyous about," but he shared that "… my tendency honestly is to kind of dwell on some of the unfortunate stuff."

Joey eventually received offers from three different churches and accepted the senior pastor position at one of those churches. He felt that his time as an interim made things much easier "…in terms of dealing with people; the ups and downs of ministry; practicality just in terms of doing the work is much easier having had all those experiences." He said that "The reality is that wherever you're doing ministry you have the same challenges, the same joys, you have the same difficulties whatever those are."

Knowing what he knows now, Joey said he "would have stepped forward no matter what." The one thing he would have changed is to say "No" when considering putting his name in the mix for the senior pastor position. He reflected,

> I did that because I knew I could; because they needed me; because I wanted to help out. It was not with the expectation that I would be given the senior pastor role; that was not my expectation. But I knew I could do it and I knew I had done it. Part of the reason I was fine doing it when he resigned is because I did it successfully when he went [to another organization because of a job commitment] so I knew I could do it; I wasn't worried about it.

He added,

> There are pros and cons to being in a support role; there are pros and cons to being in a senior executive role, and I like both. Being in, I guess if you wanna call it the driver's seat, is good in the sense that you have liberty and you have the ability to be in a direction. To take things where you want them to go or the way

> you think they ought to go. But you also have an enormous responsibility, where as an associate pastor I had to sometimes submit to decisions I disagreed with. But I also went home every day knowing that the buck didn't stop with me and that's different. For other associate pastors who are facing a transition period with the departure of the senior pastor, Joey shared some advice. First, "No matter what happens serve, like the Bible says, 'Serve as if you are serving the Lord and not serving men.' In other words do your best work." When you do your "best work," you can walk away feeling positive about what you did.

Joey continued to say, "Don't do it jockeying for the senior pastor role. Don't do it to impress anybody. Just do your best work."

With regard to the new incoming senior pastor, Joey said "keep an open mind." He added, "Support him, pray for him, make every effort that you can to work with him … If you feel like the Lord is calling you to do something else then listen to that call and go in that direction."

Lastly, Joey also wanted to highlight supporting the importance of "balance in your life." Though being a pastor "is a calling," people must also understand that it is "also just a job." Too many pastors get into the habit of "… wrapping themselves up in being a church worker" which can be "devastating when things aren't good." Therefore, Joey said, "Make sure that you are giving time and attention to your spouse and your vocations, hobbies."

When asked what advice he would give to those in leadership roles within the denomination's organizational structure about these many times volatile transition periods, Joey said " … I don't know who it was, someone in authority … said, if it were up to him he would basically prohibit guys in my position from being a candidate for the senior pastor role." To that end, Joey said, "I would echo that; I would support that. I think it would simplify things in a great way because what I saw happened in the congregation …"

Joey added,

> … what it did is that I think it kind of – I wouldn't say it split the congregation but I think it divided the congregation's sentiment and I don't know that that was healthy. By, I think, prohibiting such an individual from even being considered you remove that possibility all together. By just saying, 'No we're not even gonna consider the associate pastor. We're going to start from scratch; we're going to avoid this issue all together.' I would encourage an adoption of some sort of rule like that; that would be my suggestion.

Dalton

Dalton began his career after seminary serving as a pastor in a relatively new church for the protestant denomination to which he belongs. At this church, his responsibilities included worship, technology, youth and "whatever you have to do you do." From there, he took a position at another congregation and has served in various capacities there as well.

Dalton described this second church as a "large congregation" that has this "real historic background and value." The area in which the church is located is "changing dramatically" and "growing by leaps and bounds." Because of these changes, the "historic generational, genealogical stuff is starting to fade away" thereby placing the congregation in a "weird position" as they try to "hold on to what they've loved from the past and yet recognizing if we're gonna continue to be effective in ministry we have to change …"

Dalton also noted that the congregation is "multigenerational" and has a "large school" which brings "a lot of young families" into the church. The congregation also has a "… large senior population because people have grown up there, they've lived here their whole lives, and they've stuck around." Dalton said these factors make for "… an interesting dynamic amongst the congregation …"

It was at this second church, that Dalton's senior pastor announced well "in advance" that he would be retiring. Dalton said that the senior pastor's thought process for announcing his retirement so far in advance was to "… give the church a chance to really begin to do that research and call process without having to rush it …"

The initial reaction from the congregation about the retirement notice was positive because the members thought "… now we can get ready and we can say this is what we need to do, we can make a plan." Later though, there seemed to be a "frustration" amongst the members because they felt like getting to the senior pastor's retirement "took such a long time." Dalton highlighted though, "… what it did was it allowed our leadership to move at a very slow pace which was good for them, they needed that initially to kind of … think through it and process it." Dalton also felt that it gave the members an opportunity to "grieve" as a congregation "before he left."

With the formation of the call committee for the next senior pastor, Dalton "… didn't indicate to the call committee one way or the other …" his actual interest in the position. He said he just "… allowed the process to happen …" He did eventually receive a phone call from the chair of the call committee and was invited to breakfast. Dalton said he "kind of figured" it had something to do with the call. At that breakfast he recalled,

> … basically he said you know we've looked at a lot of great candidates and your name has been nominated very heavily through the congregation for this position but the reality is you don't have the number of years in the ministry that's required for this position so we're not going to be able to consider you.

Dalton admitted that "… initially I was very disappointed just 'cause you're kind of like well, I've been here … and I love this place." He went on to say though that "… very quickly I saw that yeah this is the Lord's work and that's not my role and now I need

to make sure that I do my role as associate and the second chair the very best that I can."

Because he was no longer a candidate for the senior pastor position, Dalton started to serve as a liaison between the call committee and the staff. Dalton said the process was "really organic." He continued,

> … where my role really became critical was when the congregation was going through the call process they quickly eliminated me … I was nominated but I didn't fit the general requirements of the position. Our other associate on the other hand was considered and he was one of the top three candidates that they were looking at. What that meant was that the old senior pastor had said he wasn't going to be involved in the call process; he didn't feel like that was appropriate so he excluded himself from that, he took himself out of it. The other associate pastor being that he was one of the candidates being considered felt like it wasn't appropriate for him to be involved in any of it so he stepped out of it. And so what happened was I became kind of by default … it just happened, you're gonna be kind of our pastoral liaison or pastoral counselor for our congregation as we go through this.

Processing some of the unique challenges during this transition, Dalton said there was one that "affected me as a staff on a very personal level." He explained,

> … when our other associate pastor, he was one of our top three candidates and really top two and he was not the guy who got it. That process very quickly degraded so as soon as he kind of sensed that the congregation, the staff, the leadership was moving in a different direction than him, quite honestly he self-imploded and it became very, very messy. We even had the [denomination's organizational leadership] come in and intervene to do some conflict management among leadership because it was so bad. And in the end it resulted in his resignation from the congregation.

Dalton said of this other associate pastor that "… I was very close to him as a friend on a personal level, we worked a lot together on the staff level, and that was just a very challenging time for everybody." The biggest part of that affected Dalton was that "… it really became a situation where you almost had to choose sides, you weren't allowed to … stay out of it, as a leader you were forced to make hard decisions and I was part of that decision making."

Another initial challenge for Dalton was that the tenure of the new senior pastor began before the former senior pastor retired. The initial question for the congregation and staff was, "who's in charge?" Dalton noted that the two pastors "… actually got together and worked very hard on establishing who was in charge." The staff had a meeting and the pastors "… kind of explained what they were gonna do, what the handoff would be like …" Dalton said, "… Initially it was a little awkward … But it actually worked really well, it was overall very seamless."

Looking at some of the positives during the transition, Dalton highlighted how the new senior pastor took the staff "… through kind of a learning process about ourselves." Through this process, the staff discovered how little they "actually trusted each other" and it brought forth "… some major conflicts that the older senior pastor was not able to really overcome or resolve …" Because the new senior pastor came in with a "fresh, clean slate," he had the opportunity to "… deal with a lot of that conflict and resolve it very quickly."

Another positive from this period was that the new senior pastor began to "cast a new vision" for the Dalton and his co-workers. The vision casting and the process on instituting it "… built a lot of trust and gave our staff a chance to work out some hard things that we hadn't before and really put us on a great foundation to move ahead and be successful."

Some of the members who wanted Dalton to be the senior pastor "were a little disappointed" that he was not considered. Dalton said though that "… how you respond to that disappointment sets the tone for how you're gonna move forward." He did not feel

like it was "that big of a deal." He said, "… that's the way the Lord goes and this is where we're going and so a lot of people just went okay and we shushed it."

With regard to his co-workers, Dalton discussed how he "took on a different level of leadership" because of the situation where his "… old senior pastor wasn't there and our other associate pastor wasn't there I was the only pastor that anybody could reflect on, talk with about this process …" He said that "… staff people who would not normally come to me come in to me and reflect on what they're feeling, what they're thinking with me and so that created a different dynamic, it was positive though."

Through the whole process, Dalton felt that he "learned a lot about [himself]." He continued,

> You know a lot of people have told me you know you're a great preacher, you're this, you're that, you'd make a great senior pastor and I bought into it, I was like oh yeah, this is okay, I'm gonna do this, this is the next big step right, I mean it's the promotion that every pastor wants, become a senior pastor of a big congregation kind of thing. And I had that mentality and going through this I realized that's just ridiculous, that's not what we're to be about, that's not how we should be thinking especially in the church, we're servant leaders and we should go where the Lord leads us and how he's gifted us. And I think it challenged me to really look at what does God want me to do right here, right now, in this seat that I sit in, that he has called me to? And that's second chair and so from there it's actually made me a better second chair than I was before because it's forced me to really say this is where I'm at, God's got me here.

Dalton said the experience also gave him the opportunity to "… go into any process now with eyes wide open knowing what the congregation's going through, …to see how a congregation transitions and grieves, adopts and adapts to the new senior pastor and the changes that come with it." It was a "benefit" for him to "watch this first hand."

In addition, Dalton added that he earned "… a lot of chips with staff and with congregational leaders because we had some really hard times and I was the only guy in

the pastorate available in one sense…" He felt like he "grew up" in the process and also garnered "… a lot of respect from congregational leaders that had never seen or viewed me on that level of leadership."

When considering advice he would give to other associates who are facing a period of transition in the senior pastor position, Dalton noted,

> First and foremost recognize that you are second chair, even when there is nobody sitting in the first chair, you are second chair and as such your role and your responsibility stays the same. Even if you end up having to take on certain aspects of that first chair recognize that it is temporary and that the Lord has called you to sit in this seat not that one … just recognize that dude, you've got a role that you're called to, just keep being faithful to that and let this other stuff you know work itself out.

Dalton also emphasized the need to "know your gifts and skills." He said, "… do the hard work of self-discovery…understand who God has made you to be and what your gifts and skills truly are." He encouraged these pastors to "… go to people who can be really honest with you and say I don't think you've got this but you have that." By understanding your position and who you are, "… you can be prepared if that call comes."

For those within the denomination's organizational leadership, Dalton felt like many people put "… blinders on when it comes to the call process …" His concern is that we put everything on the leading of "the Holy Spirit" that "hard conversations" do not happen and "… the reality is it's just stupid …" He continued,

> It's stupid because all of a sudden you throw this guy into a situation where he's gotta work with people day-to-day and there might be some serious personality conflicts …You know if you've got a multi-pastor staff or even just a multi-staff in general … Can they get on board with each other, is that something that's gonna work? And so we go in sometimes with these blinders like oh yeah the Holy Spirit will just take care of it and we even ignore what scripture says, I mean you know when the apostles are working through stuff and the counselors are working through it, here's this comment in Acts, 'It seems good to us and to the

> Holy Spirit.' Well that shows that they worked through it, they wrestled with it and so my hope will be that our [protestant denomination] … would really start to adopt an approach that recognizes that calling a pastor is as much about the right hand kingdom as it is about the left hand kingdom. We want him to come and fulfill the right hand kingdom in proclaiming the good news of Jesus Christ and shepherding the people. But as a senior pastor … 60 percent of your responsibilities are left hand kingdom, you know you gotta manage staff, you gotta make sure that the budget's on task and all this stuff is happening. And the larger the organization the greater the pressure in the left hand kingdom … so if we don't do a good left hand kingdom work in looking for a good senior pastor we're just setting ourselves up for failure or a lot of heartache and struggle.

Case

Case is currently serving as a pastor at a congregation that is part of the protestant denomination to which he is a member. This particular congregation that he is now serving in is one in which after his interview, Case told his wife "there is a church I'll never hear from again." Before this congregation though, Case was serving as the associate pastor at another congregation when the senior pastor position became vacant.

Describing this congregation where the senior pastor vacancy occurred, Case noted that things that used to work for the church with regard to "attractional ministry" over the past few decades were not working anymore. He said there were "outside influences" such as the bursting of the "mortgage bubble" that played a part in this change.

The congregation in general had an "older" membership as the church was located in the midst of a "retirement area." The church also had a preschool which was started as a way to "engage the younger generations."

Case also called the church a "place of extremes." He noted that there was great wealth within the congregation, as well as, those "… had nothing or barely scraping by."

Because of the wealth, there was a "heavy country club mentality" and it led to members going to the "default mode" of choosing "buildings and grass instead of people."

There were instances though within the congregation where some of the members were "… very excited about the Gospel proclamation into the community …" so instead of spending money on themselves they "… sponsored a habitat for humanity house in a struggling community near us …" There was also a group who made "flood buckets" for a team trained for disaster relief. Lastly, the church set aside "tens of thousands of dollars" to plant another church. So, there were a host of challenges, as well as, "… some really great things happening."

During the midst of all of this, the senior pastor position became vacant after the senior pastor took "early retirement." The retirement of the senior pastor came about due to some issues between whether the congregation truly had a "policy based governance" or was run by "a committee." Because of the struggle with how the church was actually run, a consultant came in and "… met with some people and then the senior pastor." Case called that meeting "the big line in the sand" for the senior pastor.

The executive board said they wanted to go forward with the "policy based governance." The senior pastor, though, said that he had been trying to do that "for a decade." Case further explained,

> So he got to the point of saying, "Guys I have been trying this for ten years I think I would rather retire than do another round in this rodeo." He felt like if everyone closed their eyes and pointed to the problem that all of the fingers would be pointing at him … he said, "Guys I would like to retire."

After the senior pastor retired, the congregation got an intentional interim to fill the role of the senior pastor as a call committee prepared to find someone permanently. People in the congregation were telling Case "… we need to make you senior pastor."

Case said through his "… own self-awareness, as well as an awareness of the congregation," that he was not ready to be the senior pastor so he told everyone in a "loving and gracious" way, "no thank you."

After a year though, the intentional interim left and the congregation is still in the process of calling a senior pastor. At this point, Case said that "… there are two very different conversations that happened." The first conversation came from the staff and they were very supportive of Case. Case said, "They are saying … you are our pastor. There are things that you need to do. There are ways you need to lead. We will be behind you whatever you need. Let us know."

The other conversation that took place with the executive board "was very different." Case was told "… you're the one who is going to lead them. Report for the staff in the meeting." Case "tried to be proactive" in this area and with the assistance of a retired pastor wrote out all of the responsibilities he had as an associate pastor. He divided this list of responsibilities into three categories; "… what I have to do … I can partially delegate … I can completely delegate." He added to this list the responsibilities of the senior pastor position as well. In doing this, Case attempted to head "them off at the pass" with regard to his conversations about moving forward during this interim period.

Case stated that ideally they would have said, "Look you're our pastor, we don't have a senior pastor, you're the closest thing." He went on to say, "That conversation never happened in the context of the executive board like it did with the staff."

As far as the call for the senior pastor position, Case said that he was still "wanting to stay out of it." During a two year period though, the congregation "extended

five calls, four returned." This rejection led people to come to Case and ask, "Are you sure you don't want to be senior pastor." Eventually the fifth person offered the position accepted, but that individual would not begin serving the congregation as the senior pastor until several weeks after Case had already left.

During the time of transition, Case noted several opportunities and challenges that he experienced serving in the interim position. One of those opportunities was the congregation's "paradigm shift" to more of a focus on family ministry. This change was showcased the summer after the intentional interim had left that instead of a vacation bible school the congregation hosted a "family model" program. Case shared,

> It was a great opportunity in terms of our team coming together and really supporting each other, getting each other's back. It was a great opportunity in terms of … our team really came together and tried to really creatively problem solve some of the challenges that the congregation was facing. That was really neat.

Case highlighted another great opportunity that arose within the congregation's parish nursing ministry. The congregation's parish nurse retired and Case had to decide whether to let the "parish nursing ministry die" or "make a staffing decision" which could possibly limit the new senior pastor's "opportunity to revision what parish nursing could be." Case further shared,

> What we came up with was neither … we recognized that there were a group of about half a dozen retired nurses … we called them the health team … And the health team did the essential functions of the parish nurse ministry so the ministry wasn't totally dropped… they have the congregation aware of the whole mind, body, spirit health but without placing a different staff person in that place and taking that opportunity from them. So then, the senior pastor has kind of a golden platter if you will.

As far as challenges, Case shared some of his struggles with the "human resource ministry." He said that when items came up that were "normal functioning" they were

very supportive of his role, but "anything beyond normal functioning" they did not assist him or adequately prepare him to "deal with situations." One of those instances revolved around a bookkeeper hired right before his departure. Case said,

> Only God knows her heart whether she was just really mistake prone or what, but I was dealing every week with something. A bill not being paid … I had one Sunday where I about went through the roof because the power went out. And what unfortunately went through my mind was "Oh great, did she not pay the electric bill and now our power is being turned off. Isn't this fantastic? Maybe this is what it is going to take."

Case continued,

> I thought that when she took money from the church that would kind of be a big deal …I documented. I wrote a letter. And I tried to follow the policy manual but the human resource ministry did not help me to understand that the letter had to be signed by both people in order to…anyways, they let her get off. As a pastor, called, tenured if you will, because of the policy manual if I did the same thing they had every right to say "Bye. Hand me the key right now. Get everything out of your office." But the bookkeeper … that's between God and them. It was very hard though because they chose not to deal with the situation. And she kept doing things … that was hard.

Another challenge Case encountered during the interim period revolved around when he decided to begin considering positions at other congregations and officially doing interviews. When he "… got to the point where some of the interviews were getting more and more serious," he felt that it was important that he discussed the future with the leadership of his congregation. He shared with those individuals,

> … as I look at my gifts, as I look at the direction of the congregation, here is where I see these things coming together and I would like to suggest that we work on revisioning my role … and I also had done some self-study in terms of … I like to see my role here being this. If this isn't the direction of the congregation, and if my gifts really don't help this congregation, maybe I should be open to a call. And they said nothing. And they said …'okay, the next item on the agenda is' … That was another one of those moments where you go 'really?'

Lastly, Case noted how the interim period presented him challenges on a personal level. His wife told him that "… if things don't get better I think I'm just going to have to

move back with my parents …" Case ashamedly confessed that he responded in an "entirely unloving" way by spouting some "pious platitude" such as "… God called me here and until God calls me somewhere else."

He also admitted that there were things he refused to do like talking with his direct denominational organizational leader. He needed to say, "Look, my marriage is suffering, my kids are suffering, and the ministry is suffering," but he "never had that conversation" with his direct denominational organizational leader.

Case concluded that "… there was some bright shining moments and there were some moments where you just hang your head and pray." He believed that "God was getting me to a place where … He was in the process of getting me to a point where I would take my relationship with him more seriously …" He went on to say that God "… was planting seeds in that point of my life that have come to fruit now."

Through that growth, Case believed that he has a "stronger marriage now" because he has a "stronger relationship with God." He said, "… I'm taking more seriously my spiritual leadership role that God has entrusted my care. Praying everyday with my wife." All of this "… came out of that crucible …" and "… God really used that to make me a stronger, a better child of God. A better husband, a better father, and oh yeah, tack it on, a better pastor."

The whole experience serving in the interim capacity was one in which Case said it was "both affirming and revealing." He shared,

> There were ways that I did not see myself able to lead in that capacity and to that level. Some ways where I was more prepared to lead than others were ready for me to lead. I would rather be that than the other way. And were also some ways I thought I was prepared to lead that God showed me, particularly in respect to my family and marriage, that God showed me very clearly you gotta follow me before you can ask for your wife and children to follow. Some very good things came

> out of that time … My heart still goes out to the people … They're some amazing people. There are some people I'm looking forward to seeing in heaven but not before then. But, by in large, some amazing people.

When considering what other associate pastors could learn from his experience, as well as, what the denomination's organizational leadership could garner, Case highlighted the need for "a personal mentor." He said, "… if it were not for them that whole situation would have been so much worse." He continued,

> I wish, and to this day, I'm taking ownership of it now, I wish earlier in my ministry I had someone who challenged me in a very loving way on my spiritual leadership with my wife, on our marriage, with my own relationship with God. My relationship with God is so much stronger than it was in my own awareness of him and me being in prayer and daily in his word … And now that I am more mindful of God … So thankful I had a mentor.

Mitchell

Mitchell grew up in the protestant denomination in which he would eventually become a pastor. He said that he was "baptized … blessed by a very mission minded, Christ loving pastor …" along with other ministry leaders over the years. These individuals "… were part of the congregation I grew up with … and they just showed the joy of serving the Lord and of faith and being those kind of shepherds."

He went on to say that "… God kind of captured my heart early and … was kind of calling me to pastoral ministry …" Mitchell completed all of his undergraduate coursework to go onto seminary to be a pastor, and though he was accepted at the seminary he noted that "… it just didn't seem the right time." Eventually, God "grabbed" Mitchell and after several years of being out of college he "ended up at the seminary."

With approximately two decades of pastoral experience under his belt and having served in multiple congregations, Mitchell said, "… I love what I do. Love my Lord. Blessed to serve in partnership with and alongside many amazing people and see some

great kingdom work and fruit …" He also felt especially "blessed" to be able to serve at the congregation where he is currently at the past several years.

When Mitchell reflected back on the congregation in which he was serving when the senior pastor position became vacant, he noted that they were a "… healthy … a very mission minded church when I came there as associate." They were a small to mid-sized church and it was their "wisdom" to grow the staff and add a "… diversity of gifts that don't always present themselves with one person."

The church had a "mission heart" and Mitchell felt he arrived to "a healthy situation." Mitchell served with a senior pastor for a few years before that gentleman's retirement. He described that relationship with the senior pastor as a "… very healthy, joyful partnership in ministry …"

With the retirement of the senior pastor, Mitchell as the associate pastor "pretty much assumed everything." He continued his own "responsibilities," as well as, "developing their mission ministry internationally and locally …" The church also "added a school from nothing" and grew in attendance. The church was "Healthy in many ways and a great place to do ministry."

During the vacancy, Mitchell noted that there were no written directions for him with regard to his new role. He did say though that there were some "honest conversations" between himself and the church leadership. The leadership wanted him to continue with items that defined the congregation such as "… loving and faithfully ministering to, disciplining current members, as well as, effective and faithful in reaching out and connecting to the community …" As far as "administrative" items, Mitchell

noted that he pretty much "absorbed all of it." There was no "intentional interim" or any other "additional staff" added to the church. Mitchell said, "I assumed all of that."

After more than a year of the senior pastor position being vacant, Mitchell believed that the leadership of the church "respected and appreciated" his ministry in the congregation, as well as, the "… new vision and things I helped to develop with the school, the mission's ministry, [and] enhancing and growing the youth ministry." With all of the positives though, Mitchell felt one thing the church leadership never did was examine "what their staffing need was … they never really defined the staffing model that they needed." Therefore, the call committee began the process of searching for a senior pastor because "they had had one."

Mitchell "didn't want to assume the role," but instead "… wanted the Holy Spirit to have the opportunity …" to lead the church as he has done "in the past." The church did a "self-study" and other things "… that can be helpful and can be essential in ultimately finding that right person." Yet within that period, Mitchell felt the challenge was that the congregation was not really addressing whether they needed a "second pastor" and "… clearly defining what is the role of the pastor?"

In the midst of those challenges, Mitchell made it clear to the leadership of the congregation that he "… would not allow myself to become a vessel that Satan would use to tear down what God had built up there." He acknowledged that he was "… a very different leader than the pastor …" that had retired. Whereas he described the senior pastor as "Amiable, faithful, shepherd, pastoral care, wonderful," Mitchell considered himself "… more of a banner carrier, casting a vision, and certainly engaging the people and helping to cast and lead towards a vision of where we are going."

Therefore, when the congregation had a voter's meeting to call a new senior pastor that lasted "4 ½ hours" and they still had not selected someone, Mitchell said to his wife, "I need to talk to the (leader in the denomination's organizational structure)." He added, "Maybe God is saying it's time and we need to take our gifts and serve him elsewhere because we can't allow for this to be torn down."

Mitchell continued,

> It was major … this is not how we thought it would be and so that is when I ultimately in about a month removed my name from the call list and basically said in my letter that at this time I do not believe that it is best in the interest of the church and for its wellbeing in the mission and ministry that God has called it to do.

The congregation eventually issued a call to a senior pastor, but that call was declined. During that time, Mitchell received two calls and accepted one of them. Within six months of the 4 ½ hour voter's meeting, Mitchell had left the congregation for another church. He said that "timing wise it worked well" because it gave him the opportunity get the congregation through the holiday season before he left. He reflected back positively on the congregation that he "loved dearly" and in which he had some "phenomenal relationships."

Reflecting back on the period of vacancy, Mitchell highlighted some of the challenges and the opportunities that he experienced. First, he noted that though he "… had some very gifted leaders, servant leaders that were a blessing to work with …," there were other leaders "… who had a different model in their minds of how the church operated." Mitchell continued,

> They saw themselves as the ultimate authority and supervisor rather than the pastor as truly the shepherd/leader and so, literally I had my vice president tell me, "You preach and teach and we will take care of the rest." And he was the primary source of some of the tension, as well as, some of the brokenness that

> was being generated rather than let's focus on the mission and ministry instead focused on personal agendas or personality issues. So it was primarily the people that had a different mindset and didn't understand the pastoral office and that it is more than preach and teach. It is the overall mission and vision and direction of the church.

Looking at the positives, Mitchell noted that there were some things that "were solidified." One highlight was moving the congregation from being "loving, nurturing, discipling," to taking those gifts and being "hands on" in the community. This was achieved through the "rehab of homes," working with "habitat," doing "random, tangible acts of love," and introducing the congregation to mission trips where they built an "orphanage … a hospital … [and] a church." He concluded, "That was a real joy that those things that we had begun continued to be reaffirmed and happen. That was healthy."

Another positive was the beginning and growth of the church's school. Mitchell said it was "vibrant and impacting lives." He said that "… we together had made the decision that God called us to do, they continued on and they continued healthy. And people really respect it … I have many of those I can be thankful for."

Considering how the experience impacted him personally, Mitchell had several things he shared. He shared,

> … when you get a call one of the things you do is am I being called to something or from something. You probably know that phrase but there is real truth to that … it really forced me to personally trust Christ to be my Lord. To rule, to reign over everything. As I said, my wife and I, things were so wonderful. We loved the community, we loved the people, we saw fruit being born, we were enjoying adult and children's baptisms … We thought we would be there forever. And yet suddenly it's like this isn't how it is going to be. There was hurt. The question is, 'what are you going to with it.' Try to learn through it. And I can say that I probably carried that for a couple of years. Wrestling with that. Maybe wishing that it hadn't been. What it did do is remind me that I'm going to be faithful to the mission and that is of growing the kingdom. So that was reaffirmed. And now I can see how God used that to strengthen my leadership gifts, my communication

> skills … what it did was get further in my belly missions, outreach, making disciples, and leading people in that both in my own life, as well as, modeling it and teaching it … All that to be said, hindsight says, 'God uses every one of those situations for glory while I was there and also for preparing me for what I have been doing here …'

For those within the denomination's organizational leadership, Mitchell had some suggestions for how they can improve the transition period for both the congregation and the associate pastor filling the interim role. First, he suggested that the denomination's (area supervisors) have a "real presence" and "significant leadership" in the congregation during the vacancy. Secondly, these denominational (area supervisors) need to assist the congregation in understanding the call process and helping them to "celebrate who they are and what God has done but also to point them to where maybe he is leading them next and how they will get there." Mitchell concludes that the denomination's (area supervisors) "… need to take a very active role because it is a critical time of transition in churches and they need the presence … to help them through that."

To the associate pastor, Mitchell said, "… be true to who you are and what God has called you to be rather than trying to be what that church wants you to be." He adds, "There is real value to being true to who you are and what God has placed in your heart and called you to be." He believed that if a pastor did that they would "bear more fruit" and their "longevity" would be "extended tremendously."

Reid

Reid was "born and raised in the church." His dad was a pastor in the same protestant denomination that Reid now serves as a pastor. He said that he was a "second career" pastor, but he did have "a lot of experience" serving in different capacities within the church before he went to seminary.

Reid currently serves as the pastor for two different congregations. He said he started at one church but another church that was "geographically" close "opened up" and so now he is "serving at both congregations." Before serving at these two churches, Reid served at another congregation in which he had the opportunity to serve during the vacancy period of the senior pastor.

This prior church had a senior pastor that had been serving in the congregation for a fairly long tenure. The senior pastor had started as the associate pastor in this church but "… he had kind of moved up to that position of senior pastor." The senior pastor eventually took a call to another congregation. Reid stated, "… when God called, he answered."

Reid was one of two associate pastors at this congregation. The other pastor had been at the congregation several more years than Reid had. Before his departure, the senior pastor sat both of the associate pastors down and he "… talked about the gifting that he saw in the both of us and he believed that the other associate didn't have the skills necessary in order to take on that position in the interim." The senior pastor felt that "There was going to be too many things added to the job and he didn't feel like [the other associate] would be ready to take that on and he felt that I was."

From that point, the senior pastor said he was "… going to recommend to the governing board that I take that position." Reid said he was never named "interim," but "… they gave me all of the duties of an interim except for not calling me an interim. So, it was kind of weird." Upon the recommendation of the senior pastor, the governing board "okayed it and kind of moved forward with that plan."

After "a good nine months," the call committee "… started pursuing candidates and there were a lot of people within the church who were trying to basically say 'we already have a senior pastor let's just move him into the position.'" The call committee though wanted to "… go through the proper channel kind of way …" Through that, "Both of the associate pastors were nominated by the congregation to be candidates for the senior pastor position."

The other associate pastor was "pretty easily dismissed" because the call committee "… didn't think that he could do the job …" Reid said that they "had a lot of conversations" about him and "… there were people on the call committee willing to put me forward …" The chairman of the call committee felt though that Reid was "… too young and doesn't have enough years in the ministry." Reid noted that "… even though he agreed that I was doing a good job, and that I was leading well, and everything was good …," the chairman still said, "… you still need to be old enough and you have to have the experience to take over that position."

Reid continued,

> … the chairman of the call committee and two elders who were sitting on the call committee were supposed to have a conversation with each pastor. They sat me down and they just said, 'you're doing a really good job and we just want to keep you in on the loop of what's happening moving forward' … it was a quick meeting, it was only like 15 minutes long and that's all they said. And I walked away confused why we had to have that meeting and the executive director who was present said, 'do you know what they were trying to tell you?' And I said, 'I have no idea what this meeting was for or why it was necessary.' He said, 'they were telling you that you weren't going to be considered.'

Reid did not understand "why didn't they just tell me?" He felt they should have said, "… we are just going to go through the process and you're not going to be a part of it." If that would have happened, he would have been able to ask questions like, "why

aren't you even trying to consider [me]?" Unfortunately from Reid's vantage point, "that process never happened."

With regard to whether Reid wanted the senior pastor position, he noted, "… there was a struggle for me … with what God was doing in me." Though it was a "tough deliberation" Reid did put his name up for consideration because congregation members asked him, "can we nominate you?" Reid felt that "… God calls through his people, through the congregation, and … I said 'I want to do that.'" He felt that God was "doing stuff" within him with regard to "is this the right place?" He said he "loved that church" and "… would have been happy to serve there in that capacity."

After a year of vacancy, the church called their next senior pastor. It would be about half a year after that when Reid would take a call to another congregation and leave that church. Reid described that period after the new senior pastor arrived as "really difficult."

One of Reid's jobs was to get everyone "on board" with the "new vision" that the congregation was engaging in. During this process Reid had "difficult conversations with staff" because he had to say, "hey, you need to figure out is this a vision you can get behind, that you can say 'yes, this is important.'" He felt that some of the staff "were pushing back" and they kind of said, "so now are you in authority over me."

Reid continued,

> … some people had to look at me differently because before I was just the associate pastor … That was a difficult part and then trying to transition when the new pastor came on was both helping him understand the vision that was laid out and helping him understand governing boards and policy based governance. And at the same time trying … to go back to doing what I was doing. It was really hard trying to figure all of those things out at once.

Looking back on the vacancy, Reid said it was a time where he "grew by leaps and bounds" in both his "communication" and in his "preaching." Also, he felt that he grew in his "… dependency on God because it was rough, not many days off, trying to work two positions."

As he processed the experience, Reid reflected on a few things;

> … looking back I say, "what was God teaching me" and I feel like God was preparing me for something different all along but it was also the disappointment of all of this verification from God's people that this was a position that was supposed, that they felt like [I] should have been in and then all of a sudden it's kind of taken away by a handful of people who then said, 'we already talked to him and he understands' and it just wasn't true. They didn't have the conversation with me. And so like there is the going back and saying 'what could have been and what should have been even.' I don't know.

Reid continued,

> My wife gets a little more upset about it sometimes more than me because she didn't have a place to process. So she couldn't necessarily process that out loud with the people of the congregation because a lot of it was like behind closed doors. And because a lot of it was done in secret so there is nothing really to confront. And I think that sometimes she thinks back and is like 'they didn't treat you right' and she is always trying to protect me. And so, for the most part I don't look back on it with any regrets with any more what could have been but sometimes it still stings with the lies, 'yeah, we talked to him,' but I feel like I've forgiven and put things where it needs to be. Sometimes it comes back around.

When he thought about the advice he would offer to other associate pastors facing a similar situation, as well as, some of the leadership within the organizational structure of this denomination, Reid noted a few things. First, he said that a congregation should start "… ask questions outside of themselves." He felt that congregations sometimes "… already feel like they know what they want and that's what they are going to go after and yet I think it leads them with a blindside to what they don't know." Utilizing an "outside party" might help to congregation to understand what it is "… that they are longing for."

One of those areas that Reid felt was critical for congregations to begin processing was "… who's coming up next and how can we prepare for that even though right now we aren't planning for it." Though he knew at the time he was not planning on retiring or taking a call, he asked, "… God forbid what happens if I die and this position is left open …" He said, "… let's create a plan upfront and [be] intentional to be able to put into place." To do that though, Reid noted that the congregation needed that "outside party" that had been trained "… to ask those question[s] and to lead them in a good manner towards Godly things."

Lastly, Reid noted the need for communication between the associate pastor and the leadership of the church. He believed it was extremely important "… to at least have had that conversation." For him personally, he felt that he could have learned a lot if the leadership had said, "you're not a good leader here's where you need some growth." Communication would have given him the "… opportunity to know what it is I need to learn instead of figuring out what I needed to learn …" He concluded with, "… great communication, that's what's needed it's sometimes what's avoided though."

Chapter Summary

In this chapter, rich and descriptive portraits were presented for the 15 participants which highlighted their experiences serving in the internal interim positions during the vacancy of the senior pastor positions. This chapter also presented an abbreviated background of these participants, their roles prior to serving as internal interims, their reflections about serving as internal interims, and how they processed their experiences. In the next chapter, an analysis of the data gathered from the findings of all the participants is provided.

Chapter 5 – Findings

This chapter presents the findings derived from the cross case analysis of data gathered from the 15 associate pastor participants who were interviewed for this study to share their experiences of having served as internal interims in their respective congregations. The following question guided the study: *How do internal interims perceive and process their interim experiences both during and after serving in a transitional period within their respective organizations*?

For the purpose of this study, sensemaking was defined as "… a sequence in which people concerned with identity in the social context of other actors engage ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less order into those ongoing circumstances" (Weick, Sutcliffe, & Obstfeld, 2005, p. 409). The participants in this study engaged in a reflective process of making sense of their experiences as associate pastors who served as internal interims when the senior pastor positions became vacant. While some of the associate pastors may have been considered for the senior pastor positions when the call committees convened in their respective congregations, none of the associate pastors in this study were selected to be the new incoming senior pastors.

Interpretative Phenomenological Analysis (IPA) was utilized to allow for a deeper exploration of the various perceptions and experiences of the individuals who participated in the research (Finlay & Ballinger, 2006; Pringle, Drummond, McLafferty, & Hendry, 2011). Within IPA, the participant's perspective is central to the research, yet the interpretation of the text on the part of the researcher is also critical as it lays forth a coherent investigation into what is being studied (Biggerstaff & Thompson, 2008). The

process of IPA is to analyze data on a case-by-case basis and then later make comparisons across all of the cases (Arroll & Senior, 2008).

The four themes and their respective sub-themes that emerged from the interview data in this study will be subsequently presented in Table 2 following an articulation of three important aspects leading up to the transitional periods for the associate pastors.

Background Setting for the Associate Pastors' Sensemaking

Before elaborating on these four themes and their respective sub-themes, it is important to situate and describe three important aspects that provide insight about the associate pastors' context for their sensemaking. These include: the reason behind the senior pastors' departures, the relationship and perception that the associate pastors had of their senior pastors, and the associate pastors' desire to obtain the senior pastor positions on a permanent basis.

The Senior Pastors' Departure

The departures of the senior pastors occurred for a multitude of reasons and there were various dynamics that surrounded their departures. Out of the 15 associate pastors interviewed, 4 associate pastors indicated that their senior pastors accepted positions at other congregations, while another 2 associate pastors noted that their senior pastors accepted appointments in the denomination's organizational leadership. Six associate pastors acknowledged that the senior pastors retired. Of the remaining 3 associate pastors, one indicated that the senior pastor resigned due to health issues, another indicated that the senior pastor resigned due to moral failure, and regrettably, an associate pastor acknowledged that 1 of the senior pastors died while serving his congregation. Internal pressure and conflict with the congregations' leadership was mentioned as the reason for

two of the senior pastors taking positions at other congregations and for one of the senior pastors retiring.

The departure of the senior pastors, or in one circumstance the death of the senior pastor, served as the beginning of the transition period for the congregations and specifically the associate pastors given that the senior pastor positions were now vacant. These vacancies of the senior pastor positions and the reasons behind the vacancies had a direct impact on the associate pastors, their congregations, and the process of moving forward. As Jim noted, "… he (senior pastor) shortly thereafter took a call … So he left … And it really just started us down a path of a lot of transitions. A lot of difficulties."

Similarly, Mason discussed some of these realized difficulties by stating, "… there was also quite a bit of conflict. He (senior pastor) was strongly encouraged … to take the call … by the leadership. There was some discontent, discord over the direction things were or were not going …". Mason said that, "… it was a highly conflicted situation." Dustin also highlighted a similar scenario by saying, "The congregation here made life almost miserable for him (senior pastor). And I would say they didn't run him out but they made life pretty miserable for him."

Joey shared that the moral failure of the senior pastor led to the vacancy at his congregation. He said, "… he (senior pastor) was involved in an inappropriate relationship. So obviously he had to resign his call, and he did very gracefully, and without any sort of recalcitrance or any sort of resistance at all." Joey indicated that he was "… dealing and helping the congregation through the grief, and the brokenness, and to understand how to process this, and how do we continue as a congregation. It was very complex and difficult …"

In contrast to these other departures, Mitchell indicated that his situation was a "healthy situation" and that "… it was retirement that led to the senior pastor office vacancy." Mitchell noted that the congregation was "Healthy in many ways and a great place to do ministry." Yet, with the seemingly healthy church and noneventful retirement on the senior pastor, Mitchell still experienced a congregation that was "manipulating" the process and others that were "being torn" by the transition.

Relationship with the Senior Pastors

Another critical element leading up to the departure of the senior pastors was the relationship that the associate pastors had with their senior pastors and their view of the senior pastors in retrospect. Four of the associate pastors spoke highly of their former senior pastors using words like "mentor," "dynamic," and "gifted." Five of the associate pastors were critical of the former senior pastors and had poor views of them. They used words such as "betrayal," "puppet," and "frustration" to describe their relationships with these individuals. The remaining 6 associate pastors had either a neutral view of the senior pastors or really did not mention them at all during the interviews.

Gene, Jim, and Mitchell were three of the associate pastors that spoke highly of their former senior pastors. Gene stated that, "He (senior pastor) was a great parish pastor … he is definitely all things to all men kind of a person." Jim said, "… a dynamic leader just very, very gifted in his kind of visions, strategic thinking, all of those kinds of things." Lastly, Mitchell succinctly described his former senior pastor as "Amiable, faithful, shepherd, pastoral care, wonderful."

Bobby had a very different experience with his former senior pastor. Bobby said, "I had asked (senior pastor) some point blank questions, and later on I found out he point

blank lied to me." Bobby said the reason for the dishonesty was "… he just didn't tell me the whole truth because basically he relied a lot on (Bobby's wife) and myself and he didn't wanna go into his last year of ministry without us being here."

With regard to his former senior pastor, Cole had some harsh words to share as well. He said, "He (senior pastor) didn't have the ability to put his two feet firmly planted in the ground … he didn't have that ability so I did a lot of leading in the background."

From Austin's vantage point, he described his former senior pastor in a very neutral sense. He stated, "He was the kinda guy that just … he seemed to have so many plates spinning in the air at one time that – it was kind of a magic act, though, how he did it all."

The Associate Pastors' Desire for the Senior Pastor Positions

Lastly, the desires of the associate pastors to obtain the senior pastors positions on a permanent basis was an interesting dynamic when exploring the themes that emerged throughout the interviews. Out of the 15 pastors interviewed, 12 of them were either actively desiring the position or were at least interested in obtaining the position through the call process. There were 2 associate pastors who did not want the senior pastor positions and a third associate pastor who was unable to become the senior pastor due to the denomination's organizational polity.

Some of the associate pastors wanted the senior pastor positions and felt like they had the gifts and abilities to be successful in that role. Gene honestly stated, "… I really want the call yeah, I wanted to have this and I would be disappointed if I don't get it …" When asked if he wanted the position Michael said, "Yeah it was a neat place. I work well with the principal, and with the worship leaders, and directors that I did a lot of the

legwork already …"

Many of the pastors, however, interested in the position and who felt that they had the ability to serve in that capacity wanted the call process to take its course. Joey stated, "I wanted to help out. It was not with the expectation that I would be given the senior pastor role; that was not my expectation. But I knew I could do it and I knew I had done it." Cole added, "… I wouldn't stump for that. I would never do that … I think that I have the skills and ability to do it." For Dustin, he stated, "I think that there was a desire in my mind to I guess force the congregation to embrace the process" and if that decision led back to him he noted "then we need to talk."

Two of the other associate pastors that were interviewed seemed to either not want the senior pastor position permanently because of a lack of experience or because of a realization of specific unhealthy dynamics that existed in the congregation. Case shared, "… in terms of my own self-awareness, as well as an awareness of the congregation … I wasn't ready to be senior pastor in that congregation at that time." He said, "I mean God obviously sent me but what I said to everyone is a loving and gracious 'no thank you.'"

Other pastors were content with their current roles and at the same time would take into consideration the possibility of being the senior pastors permanently if they were asked. Laurence echoed this by saying, "My feelings won't be hurt. This won't affect me one way or the other if you decide not to recommend my name for the call. I'm perfectly happy and content and feel God has more things for me to do …"

In summary, the reasons for the senior pastors' departures, the associate pastors' relationships with the senior pastors leading up to the vacancies, the associate pastors'

desires to obtain the senior pastors' positions provide a clearer understanding of the dynamics surrounding the associate pastors and the transition periods that they experienced. Table 2 presents the four themes and respective sub-themes that emerged in this study.

Table 2

Emergent Themes and Their Respective Sub-Themes

Lack of Direction • Lack of Role Clarity • Lack of Leadership Preparation
The Contentious Call Process • The Political Nature of the Call Process • The Lack of Transparency of the Call Process • The Emotional Upheaval Attributed to the Call Process
Making Sense of the Interim Experience • Growth and Learning • Trust in God

(continued)

Recommendations and Advice

- Communication
- Preparation
- Change the Call Process

Emergent Themes

The first theme was the lack of direction that the associate pastors experienced going into the transitional periods within their congregation. Lack of role clarity and leadership preparation reflected sub-themes. The second theme was reflective of the contentious call process and how this process was handled during the time of the vacancies. The political nature of the call process, the lack of transparency of the call process, and the emotional upheaval attributed to the call process reflected sub-themes. The third theme related to how the associate pastors made sense of their interim experiences. The two respective sub-themes associated with this broader them included growth and learning and trust in God. Lastly, the fourth theme represented the recommendations and advice that the associate pastors shared for fellow associate pastors and the denomination's organizational leadership. The respective sub-themes were: communications, preparation, and change the call process.

Lack of Direction

The first theme that is noted consistently throughout the interviews is the lack of direction that associate pastors received going into to the internal interim positions and what was required of them during this transitional period. When asked about the direction that was given to the associate pastors from the congregations after the

departure of the senior pastors and their assuming the positions on an interim basis, only one of the associate pastors acknowledged having had anything written down for him with regard to expectations and specific duties. The other 14 associate pastors interviewed acknowledged that there were conversations to varying degrees, but nothing formal had been written down. Two of the 14 associate pastors felt like they were already performing the role of the senior pastor while a third associate pastor experienced no lapse in the senior pastor position so his role was altered very little.

Discussing the lack of direction, Michael felt that honest and open conversation would have been helpful for him and the church leadership early on in the vacancy to determine the direction moving forward for the church. He said, "… we were ready for the new chapter … So I think … hindsight it would've been really healthy that we all sat down and just kind of put our cards on the table …"

In the case of Gene, he noted that "…. there was never a defined job description saying this is what we expect of you … I wish we'd had a little more direction on that but lesson learned." When reflecting on his experience, Case simply stated, "no." with regard to any direction that he may have received.

Bobby shared his frustration by stating, "… there wasn't much direction given, to be honest. It was basically, 'Keep things running; keep us moving.'" Though he felt like he was "leading already," Cole faced a similar frustration by not receiving any clear guidance from the leadership of the church during the time of transition.

For Joey, nothing was written down. He was told by the church leadership that they wanted him to "stick with the status quo" and stay with a plan of "smooth sailing" as

the church moved forward. Outside of that, Joey mentioned "… there wasn't a whole lot of direction …"

Lastly, Mitchell discussed that he had some "honest conversation[s]" between himself and the church leadership, but as far as anything formally being written down, he stated for the most part, the answer was "no." Without anything written down and without any additional staff, Mitchell epitomized the struggle with no formal direction as he found himself quickly having to assume all of the responsibilities of his role, plus that of the senior pastor. He lamented, "… I absorbed all of it … They did not add any additional staff. I assumed all of that."

Lack of role clarity. The associate pastors acknowledged that, although there was nothing written down for them, there were definitely expectations, both voiced and implied by the church with regard to what the pastor needed to be doing during the transition period. These expectations varied from very ambiguous directives, such as not allowing the ministry to "shut down," to just maintaining more "traditional duties" such as preaching, hospital visits, and leading bible study which, in turn, led to a lack of clarity on the part of the associate pastors.

Jim highlighted this by saying, "… though nothing was written … the expectations were that you're going to be kind of the glue that holds us all together and we're going to expect that you'll kind of step up." For Mason, even though nothing was written down he noted, "Verbally it was, 'Get us through this time until we can get a senior pastor.'" For Laurence, "There wasn't a formal conversation … I think it was just largely understood … But they largely left some of those decisions up to me in terms of what I felt comfortable taking on …"

Joey, for his part, knew what he wanted to do within the congregation during the transition. He really wanted to focus on "… healing, and reaching out, and just making things available to them (the congregation)." Yet, he felt like there was very little direction with regard to those matters from the church leadership.

The lack of clarity experienced by most of the associate pastors was compounded by the perceived uncertainty that the church leadership had with regard to what specifically the senior pastors did. Dustin highlighted this by saying, "… the leadership has never been active in setting any kind of expectations. The leadership … don't have a clue what an interim senior pastor does." Dustin continued, "They didn't set any kind of … deadline or we want you to do these three things … There was none of that. It was hey you're here. Great. Go. And it created all these … problems ..."

In Mitchell's situation, the congregation did a "self-study" and "… all of those things that can be helpful and can be essential in ultimately finding that right person." The challenge for Mitchell's congregation though, and later for Mitchell personally, was because the congregation never "fully and clearly define[d] 'what is the role of the pastor.'"

Bobby delved into this issue as well by stating, "… I would say there was some of the leadership [that] … had this sense that (the former senior pastor) did everything … we're gonna just go kablooey once he leaves." He went on to say that some people believed that "… nobody's gonna be running the show … since there's not somebody sitting at the desk at the door that says 'Senior Pastor.'" Bobby indicated that most of the problem revolved around the lack of clarity that the congregation had with regard to the senior pastor position and once they realized that "… worship services are still

happening; we're still getting new members; there's new member requests; their school's doing okay; and this is doing okay …" then some of the uncertainty "kind of eased up."

In the end, some of the issues that presented themselves were because the congregation did not understand what the senior pastor did and therefore it impacted their perceptions of what they needed from Bobby during the transition. From Bobby's vantage point though, it did not bother him as much because from a "staff standpoint" because he already knew the reality.

Lack of leadership preparation. In addition to the lack of clarity for the associate pastors serving in the interim positions, another issue that emerged was the consistent lack of preparation on the part of most of the congregations to enact a well thought out succession plan at the departure of the senior pastors. The associate pastors had nothing written down, except for one of the 15 pastors. The church leadership at the associate pastors' congregations seemed unsure of their next steps during the transitions. It was not clear if they should contact an intentional interim, which is a distinct position from the associate pastors expected to serve as internal interims, whether they should form a call committee immediately to identify potential new senior pastor candidates, or, if they wanted to restructure their staff during this period of vacancies. Furthermore, the lack of leadership preparation for the associate pastors as another significant shortcoming.

Laurence highlighted this idea by noting that he wished that more would have been "put on his plate," especially "administrative tasks," before the senior pastor retired so he would have had a better understanding of everything that the position involved. Because there were no formal directions for him by the church leadership, he said of that

period, "… I think a lot of what I experienced just had to be trial by fire." Gene noted that he wished he was given more administrative tasks too, as well as, being trained more broadly so he would know "how to do different things."

Even Austin, who had a more positive experience with regard to preparation on the part of the pastoral staff and the church leadership leading up to the vacancy, chided the denomination's organizational leadership as a whole noting that "… we don't think enough about transition …" He said,

> You know, it seems like our only succession plan for most congregations and (denomination's organizational structure) is a guy takes a call, he cuts all ties, he leaves. And that's it. And when a guy who had been handling virtually everything cuts all ties and leaves, it just leaves a congregation just sort of dizzy with, "Wow. We had no idea who did all these things," or, "We've never had to think about these things before because he always did it for us."

Dustin had the opportunity to talk to his former senior pastor at the time of his departure about preparation for the transitional period. The senior pastor confessed to Dustin, "You know I really haven't given you my best." Dustin continued, "And he's right. He did not." This forced Dustin into a position where he had to "pump some leadership iron."

For Chad, his senior pastor was unable to prepare him as a leader within the congregation due to a mental health issue that he suffered. In addition, Chad noted that his [area supervisor] "… never even saw me preach live. I mean I got nothing from him. He got a check for having me under him and that was about it."

Lastly, for Cole he referred to the transitional period and the lack of preparation as a period where he was "swimming most of the time" and "trying to figure out what the pastor is supposed to do." Cole spoke poorly of his former senior pastor calling him a "puppet" and someone who did not "… have the ability to put his two feet firmly planted

in the ground …" which led to his only preparation coming from learning "what not to do." In the end, he told the church leadership that he "needed some help" as he was "… just trying to keep things from sinking."

The Contentious Call Process

The next theme that emerged from the interviews was the definitive feelings that the associate pastors had about the call process. The process by which a call committee, a group of lay leaders within the church, established the criteria for the selection of the next senior pastor and then went about conducting the search and eventual selection of that individual, was a source of varied and emotional responses on the part of the associate pastors who were currently filling the senior pastor positions on an interim basis. All 15 associate pastors interviewed had something to say about the call process. Eight of the associate pastors expressed a negative experience with the process and used words and phrases such as "lied to," "hurt," "unfair," "lack of support," and "frustrated." Five of the associate pastors viewed the process as a positive experience and used words such as "smooth" and "healthy" to describe their experience with the call process. The remaining two associate pastors had mixed feelings about the process with one of them saying that it was "the best and worst of times."

The call process has many facets within this particular protestant denomination. From gathering names of potential pastors to fill the vacated positions from the denomination's organizational leadership, to conducting interviews, all the way to extending a divine call to an individual to serve as the new incoming senior pastor for that particular congregation. In all of this, as Dalton noted, it is a process that the protestant denomination believes is "led by the Holy Spirit." The issue becomes, as

Dalton stated, that call committees put "blinders on" and believes that if the God is leading this process "… you don't have to think about it …" and "… don't have hard conversations …" From these dynamics, various aspects of the call process began to appear based on the specific congregations, its leaders, and the situations surrounding their vacant positions.

For Mason, because he excluded himself from being called as the senior pastor, the call committee invited Mason to be a part of the process. The call committee said to Mason, "We'd like you to be involved in this process … you're gonna be working with this gentleman, so it's important you have some type of input, say, direction, and focus as we work on this together." Mason was not asked to "make the decision," but he was able to assist the call committee in formulating "a list of questions" and helping them in thinking about their "… most critical match needs for [the] congregation and its ministry."

Dustin's experience was unique because he served on a call committee at his former congregation before he became a pastor. He said that he was the one who had to tell a pastor, "… I need to let you know that the call committee does not believe that you are the right candidate at this time." He said, "That was a tough conversation and I didn't like it … but I had to deliver that." From that experience, Dustin believed it has given him some "wisdom" and allowed him to avoid some "mistakes" when it comes to how properly the transition period is handled.

Bobby shared some insights into the call process. He said,

> I think sometimes our doctrine of the call gets in the way because – not the actual doctrine but the way we interpret the doctrine of the call gets in the way. Because we take it in this theoretical realm or we take it in this theological realm, and we forget the incarnation realm, what it really is about. That there's real human

> beings with flesh and blood with both strengths and weaknesses, and there's a lot of that going on.

Political nature of the call process. Despite the denomination's organizational structure having many established guidelines for the process of calling a new senior pastor, the actual process seemed to showcase an extensive lack of uniformity across the associate pastors' experiences in this study. Multiple associate pastors shared their concerns, frustrations, and outright feelings of disgust with the way the call process was handled by those in leadership positions.

For Jim, his particular situation dealing with the political nature of the call committee was a negative experience. He would receive the call from the congregation as a whole to be the next senior pastor but realized that he did not have the support of the call committee. He said, "I had the popular vote but not the leadership vote." Due to this, Jim decided not to accept the position.

In Joey's situation, he attempted to guide the church and the call committee early on in the call process. He told them, "You need time to process … before you can receive a new pastor in a God pleasing healthy fashion. That was my coaching; that was my encouragement … 'Let's wait.' Unfortunately the leadership did not agree with that philosophy …". Eventually, the call committee brought forward three names for the congregation to vote on for the senior pastor position, one of which was Joey. However, an interesting event unfolded. Joey shared,

> … the Call Committee came up with three individuals to be brought before the congregation, three recommendations … there was one candidate, not myself, who got almost enough to be voted as the candidate elect. However, I had enough support and votes to make that impossible … it was something like 64 percent and 36 percent … where I had 36 percent. In other words it was just barely not enough for this other candidate to get a call from the church. So basically what happened is the Call Committee, or representatives of the Call Committee,

> approached me and asked if I would consider withdrawing from the running so that another vote could be cast and a decision could be made in that regard. So I did and I stepped away from it at that point, and then I was not a part of the running anymore after that.

Joey said that he believed there was a concerted effort on the part of the call committee to eliminate him from consideration. He said, "… I think there was some degree of orchestration in the process. In other words I don't think the playing field was level when I was considered as a candidate."

Michael was one of three candidates under consideration for the senior pastor position, but was told that he was not the top choice of the church leadership. He was encouraged to consider removing his name from consideration and, though it hurt, to avoid disunity within the church as a whole he said, "… I'll take my name off."

The political nature that Mitchell experienced was situated around wrestling with the vice president of his congregation. He stated that this gentleman was the source of a lot of the "tension" and "brokenness" happening within the congregation. Mitchell said this individual and others saw themselves as the "ultimate authority" in the church instead of the pastor and it caused the congregation to lose sight of their "mission and ministry" because they were "focused on personal agendas or personality issues."

In sharing his experience, Bobby explained that the call committee at his congregation "… operated differently … they ran amok, and they just kind of ran rogue." He continued by saying, "It was supposed to be a subsidiary of the Board of Directors … and the Board appointed them, and they quickly told the Board that they would not report back to them." The call committee emphasized that the congregation would support their "recommendation" to which Bobby noted "Well crap, that's not gonna be good. This is gonna be very political …"

Reid also experienced a situation where the call committee did not want him as the senior pastor though he felt the congregation as a whole did want him in that position. To that end, the call committee lied to the congregation at the voter's meeting when discussing the possibility of Reid being the next senior pastor. He spoke at length saying,

> … they had a lot of conversation about me and when it came down to it, even though there were people on the call committee willing to put me forward, it was the chairman of the call committee that said, 'he's too young and doesn't have enough years in the ministry.' And even though he agreed that I was doing a good job, and that I was leading well, and everything was good … he still said 'you still need to be old enough and you have to have the experience to take over that position.

Reid continued,

> … the disappointment of all of this verification from God's people that this was a position that was supposed, that they felt like [I] should have been in and then all of a sudden it's kind of taken away by a handful of people who then said, 'we already talked to him and he understands' and it just wasn't true. They didn't have the conversation with me. And so like there is the going back and saying "what could have been and what should have been even.

Lack of transparency in the call process. Along with the political nature of the call process that was expressed, several of the associate pastors that were interviewed shared their concerns about the secrecy of the call committees and church leadership during the transition process. Without anything formally written down and the lack of uniformity in the way the process was handled, several of the associate pastors felt maligned by the way they were treated during the process.

Bobby described his experience with the call committee by sharing that, "They got a guy to guide them, but he was used to corporate; he had really no expertise in the church realm. He'd always done … transitions in corporate America, and so that's the way they ran it." Bobby shared that the call committee met with him and told him that he

"… would not be sought after as senior pastor." He continued, "I asked, 'Why?' and they said, 'We're not gonna give you any reasons why.' To this day I have no idea why I was passed over or what it was, and so that's kind of how it went." Being removed from consideration for the senior pastor position without explanation and led Bobby to state, "… you're then realizing, 'Well this decision was made.'"

Gene noted that he started "sensing" something from the call committee and the church leadership with regard to their struggle on whether to call him as the senior pastor or not. Gene then was subjected to a voter's meeting where the call committee was untruthful about their conversations with Gene. He said,

> … nobody gave me any feedback … nobody said to me we're not going to call you, nobody said anything, I didn't find out anything until the voter's meeting … when they put … two or three different candidates forward for the church to vote on. And then one of the elders made the comment and said I know many of you are wondering about Gene, well we've talked to Gene and we've come to an agreement that he is … to remain as his current role would be the best for him and for the congregation, and that was the first I had heard of that . Now looking back I was mad, I was hurt, and I was just like I'm done…I am not the leader they want.

The situation for Reid was one in which some of the leaders of the call committee sat him down and said, "… 'you're doing a really good job and we just want to keep you in on the loop of what's happening moving forward.'" Reid continued,

> … it was a quick meeting, it was only like 15 minutes long and that's all they said … I walked away confused why we had to have that meeting and the executive director who was present said, 'do you know what they were trying to tell you?' … He said, 'they were telling you that you weren't going to be considered.' And I said, 'why didn't they just tell me?' … Then I would have been able to ask questions like, 'why aren't you even trying to consider?' And they could explain those things about why I'm not considered. But that process never happened.

Because "… a lot of it was done in secret," Reid was frustrated because there was nothing tangible "to confront" which made the lack of transparency very difficult for him to handle.

The situation in which Joey found himself was challenging due to the fact that the senior pastor's departure from the church was because of an inappropriate relationship. Joey believed that situation had an impact on the way people perceived him. He felt that he had "strong support within the congregation" to be the next senior pastor, but the call committee asked him to withdraw his name from consideration to allow for the individual they were recommending to be selected.

Joey spoke about that period by saying,

> … once I was out of the process, I thought, 'Okay this isn't what God wants.' I was frustrated because in the sense that I felt like, 'What exactly was it that they found so unpalatable or unsatisfactory?' I still don't really know.

Emotional upheaval attributed to the call process. Emotions, and the consequences that resulted from them, consistently appeared when the associate pastors interviewed discussed the call process that they had each experienced.

Bobby shared his experience after receiving news that he would not be selected as the senior pastor. He said, "… the call committee began "parading guys in" as potential candidates for the position." Bobby said that these candidates "… had no qualifications hardly whatsoever. Certainly not more qualified and had the kind of experience that I had, and it was really a more hurtful thing …" He said that he wrestled with the situation because he felt like he was betrayed by a "rogue" call committee while at the same time serving a congregation that he really cared for and they seemed to really care for him in return. Reflecting on the experience he asked, "… you loved me as an associate; what is

the deal that you don't see me as a senior?"

For Michael, he had removed his name from consideration due to the direct urging of the church leadership. This decision, though, brought about the ire of the congregation as a whole. Michael noted, "Then my groupies, my fan club got really upset. They go wait a second. Don't we get a choice? You're just going to bring one name to the table, and we don't get a chance to vote." Michael then felt compelled to put his name back into consideration, but eventually lost the vote for the senior pastor position which was a difficult period for him.

He continued,

> … I think that was doomsday … that was early in the summer, and so that was just hard to swallow… knowing that they wanted me to take my name off or to make it easy for everyone I think was a bummer. Now the day, that Sunday afternoon I got a call from the elder afterwards saying we're going to go with (senior pastor candidate), then I kind of knew what to do. So I went to work the next morning, called (senior pastor candidate), and one of the leaders even called the secretary, hey did Michael show up today? Yeah he's here.

Jim's experience was extremely difficult as well. He noted that he "… had the popular vote but not the leadership vote." He described the whole process as one that gave him "gray hair" and was "tension" filled. A period that he would call "the worst time of my life." Jim stated, "I've had to go through very difficult times. I don't know if I would do that again though. The easier option would have been to leave. It was a very, very painful time for my family …"

Dalton's experience was unique in how it impacted him. He was quickly ruled out of consideration for the senior pastor position because he did not meet the requirements of the church's job description. His co-worker and friend, the other associate pastor, was

in contention for the vacated position but was not selected. Dalton discussed this emotional period and said,

> We had a really unique challenge for our congregation and it affected me as a staff on a very personal level when our other associate pastor, he was one of our top three candidates and … and he was not the guy who got it. That process very quickly degraded so as soon as he kind of sensed that the congregation, the staff, the leadership was moving in a different direction than him, quite honestly he self-imploded and it became very, very messy. We even had the [denominational organizational leadership] come in and intervene to do some conflict management among leadership because it was so bad. And in the end it resulted in his resignation from the congregation.

Gene really struggled after the call process because the call committee lied to the congregation about Gene's desire to become the senior pastor. He was so distraught by the deception that he even considered "… stepping out for a while from ministry …" He said, "… I had just kind of figured out … I'm not long for this place …"

Lastly, both Reid and Mason shared some of their painful experiences. Reid said that he was lied to by the church leadership and that experience still "stings." He believes that he has "forgiven" others and moved on, but sometimes the pain and the frustration "comes back around." Mason summed up his volatile experience by saying it was a "… pretty conflicted situation, and I was the only one … that survived it."

Making Sense of the Experiences

The time serving in the interim positions, coping with the various dynamics of the call process, and then eventually not being selected as the senior pastors, led to a wide variety of reflections from the 15 associate pastors interviewed. As the associate pastors reflected on, processed, and made sense of their interim experiences, two sub-themes emerged: growth and learning and trust in God. The associate pastors felt that there was

considerable learning, both personally and professionally, as well as a renewal and strengthening of their trust in God.

Growth and learning. In making sense of their interim experiences, many of the associate pastors acknowledged how the time of transition and in serving as internal interims was one of growth and learning for them, even though it came in midst of a lot of hurt and struggle. For example, in Michael's situation, he was asked to remove his name for consideration of the senior pastor position. Though the situation was initially difficult, Michael eventually came to a place of peace. He said, "I was like okay … I think the healthiest … was to support whoever they support, but be ready to be open to move on so he (the new senior pastor) has a healthy new team that he can put together."

For Cole, reflecting on his interim experience, he said, "… it's been baptism by fire … one of the things that I've learned … is to think on your feet … Be as well prepared as you can be going in to the situation …" Austin concurred and indicated, , "I think by and large, because I've just sorta been thrown into the ring, I kinda have to come out ready to face whatever it is. So I've grown a lot this year."

Jim shared that the interim experience was "… a very, very tough time." Yet, reflecting on that experience he said, "For me personally I really learned a lot about leadership. It's like being pushed into the deep end of the pool and start swimming."

Mason's experience seemed to be more positive. He said, "… I really think as I look back now, it really prepared me for … some of the really oddball situations I've ended up in. So it was a time of incredible growth."

Joey reflected on how the experience impacted him spiritually, as well as, practically. He said,

> Working in God's Word all the time … was very beneficial for me spiritually and … vocationally … I think for myself personally I got a lot more comfortable with just dropping the hammer on stuff, and what I mean by that is because of my personality and the way that God has … designed me, I tend to be very reflective . So it's in my nature, when I have a decision to make, that I wanna spend as much time as I can on making decisions. I think that I grew in the sense of being able to just say, "Okay here's what we're gonna do," and trusting myself … In retrospect I might find that I'm wrong, but for right [now] here we go, this is what we're gonna do.

Lastly, Dalton spoke at length about his personal growth from the call process and the transitional period. He said,

> Yeah I learned a lot about myself. You know a lot of people have told me you know you're a great preacher, you're this, you're that, you'd make a great senior pastor and I bought into it, I was like oh yeah, this is okay, I'm gonna do this, this is the next big step right, I mean it's the promotion that every pastor wants, become a senior pastor of a big congregation kind of thing. And I had that mentality and going through this I realized that's just ridiculous, that's not what we're to be about, that's not how we should be thinking especially in the church, we're servant leaders and we should go where the Lord leads us and how he's gifted us. And I think it challenged me to really look at what does God want me to do right here, right now, in this seat that I sit in, that he has called me to.

Trust in God. Another sub-theme that emerged during the course of the associate pastors making sense of their interim experiences was the idea of trusting in God. Many of the associate pastors, despite the positives and negatives associated with their interim experiences, were able to look back and see how God was at work both during and after their time serving in their interim roles.

Jim had a unique scenario in which the congregation called two intentional interims to assist in the transition period with their individual tenures each spanning several months. Eventually the congregation decided to call Jim for the position of senior pastor to which he declined. As he stated, "They called me but the interesting thing with this was I had the … popular vote but not the leadership vote." Wrestling with the various dynamics of serving during the transitional period and knowing he did not have

the leadership support, Jim commented that it was "… a very tough, tough time." He said, "… I've told people … 'I wouldn't wish it upon anybody. But I wouldn't trade it for the world at this point because of what I see God doing and what he did in the midst of it.'" He concluded by saying, "God had to work through a lot of these transitions to get us ready … I learned a lot and … God did amazing things and I believe we're here today in a good place. "

Dalton viewed his internal interim experience in this way. He said,

> … I think it challenged me to really look at what does God want me to do right here, right now, in this seat that I sit in, that he has called me to? And that's second chair and so from there it's actually made me a better second chair than I was before because it's forced me to really say this is where I'm at, God's got me here.

Joey, speaking about the experience as an internal interim and not receiving the senior pastor position permanently, said, "Okay God is not calling me to do this. God has something else in mind and I have to trust in that process.'"

Dustin was very introspective of his experience by noting,

> … I felt like God has prepared me … to one day be a senior pastor and all that. It has definitely shown me that - be careful what you ask for. And it's really shown me especially in the context of where I am with some challenges that we have … how inadequate I am.

Laurence shared his thoughts by saying,

> It certainly was a humbling time and a time of reflection … I think my eyes are more wide open to the weight of responsibility that is on whether it's a sole pastor or a senior pastor as someone people look to be able to help them deal with issues and help them solve problems and be able to reconcile relationships together … I probably was encouraged in myself that, okay, with God's help, I actually could maybe do this. I still see that I would need a lot of growth and forgiveness from the congregation as we kinda stumble forward together, but know, okay, I can do this in God's grace.

Case remarked, "I see now that God was getting me to a place where … He was

in the process of getting me to a point where I would take my relationship with him more seriously …" and Mitchell shared at length,

> … it really forced me to personally trust Christ to be my Lord. To rule, to reign over everything. As I said, my wife and I, things were so wonderful … We thought we would be there forever. And yet suddenly it's like this isn't how it is going to be. There was hurt. The question is, 'what are you going to with it.' Try to learn through it. And I can say that I probably carried that for a couple of years. Wrestling with that. Maybe wishing that it hadn't been. What it did do is remind me that I'm going to be faithful to the mission and that is of growing the kingdom.

Chad concluded these thoughts by saying, "…God's no fool … I am where I am supposed to be."

Recommendations and Advice for the Future

All 15 associate pastors shared advice based on their experiences serving within the unique role of internal interims at the departure of the senior pastors and not receiving the call to fill those positions permanently. Most of their advice was directed at other associate pastors who might be going through a similar process or may have such situations arise in their futures. The advice really revolved around how the associate pastors should handle themselves personally, professionally, and even deeper on a spiritual level. Some of the associate pastors also shared suggestions and concerns for the denomination's organizational leadership. These suggestions and concerns revolved around the actual call process and ways to improve it along with better ways to train and prepare associate pastors who might experience such scenarios.

Communication. Communication from all vantage points was a prevalent among the associate pastors and emerged in their advice. For example, Gene was adamant that associate pastors get expectations "written down." In this way, the congregation is specifically communicating to the associate pastor what is expected of

them during the interim period. Dustin concurred with this direction of getting everything written down by saying "… do not even have a conversation with the congregation until they layout clear expectations …"

Michael and Chad also emphasized the importance of communication. Chad believed that the associate pastors should "Communicate first of all with your people, with your leaders … communicate in love obviously but if you communicate then you're going to have a much better relationship so that when something is needed you can work together." Michael delved into how effective communication promotes a better understanding of others. He said,

> I realized that you know it's communicating with people, with leaders in a heart to heart, getting inside what they're thinking, because no one is thinking what you're thinking. You think that just because you're in this role that everybody is going to, but when they go home they're talking about it. So, really humble yourself. Get more people involved, and really kind of listen to their point of view.

Communication was a key issue for Reid as well. From his vantage point, he wished that the leadership of the church would have communicated with him more with regard to their expectations and concerns. He said, "I can learn a lot if someone is saying, 'you're not a good leader here's where you need some growth'" Reid said, , "… to have the opportunity to know what it is I need to learn instead of figuring out what I needed to learn … great communication that's what's needed …"

One issue that Jim noted was how the pastoral position many times gets placed on a "pedestal." Because of this, he believed that things "… go unsaid that are very difficult because they (the congregation) want to be supportive of their pastor." Jim said, "… I would love to see … somebody to be trained in family systems or whatever that would say I could help …" with better communication during the sensitive time of transition.

Lastly, Mason mentioned how critical it was for all those involved during the transitional period to, "listen, listen, listen." He went on to share from his experiences that those in the denomination's organizational hierarchy need to maintain "… a very open line of communication with the congregation and its leadership" as it is critically important during these potentially turbulent times for both congregations and associate pastors.

Preparation. Congregations were consistently unprepared for the transition periods and all that it entailed as were the associate pastors in most cases. Gene broached this topic from the vantage point of associate pastors' desiring the senior pastor positions permanently. He advised associate pastors to take the time to "pray" about the senior pastor positions and make sure that they are "prepared for it" if the decide to put their name into consideration. Jim added to the prayer and preparation idea by noting, "… you have to really, really be confident of what you feel God is calling you to do because this will test every part of that."

Laurence looked at preparation from the vantage point of the associate pastors preparing the congregations for the new senior pastors that would be coming into those positions. He said, "… once you come to the point where you know that you aren't going to receive the call for senior pastor, how do you help the congregation prepare for the new person?" Joey added to that healthy mindset by stating, "… do your best work. No matter what happens do your best work. So however it ends up that you can walk away feeling positive about what you did."

Mitchell acknowledged that his congregation had no "significant leadership" from the denomination's organizational leadership during this time of transition which led to

many issues. He believes that these times of transition are "critical" and the denomination's organizational leadership needs to be "present" and "give guidance" to congregations so that they are "equipped to do it and enabled to do it" when it comes to the transitional periods that are experienced when senior pastor positions become vacant.

Reid also shared his concerns especially noting some potential issues that organizations faced thereby needing a well thought out succession plan. He said,

> … who's coming up next and how can we prepare for that even though right now we aren't planning for it. You know I'm not planning to take a call. I'm not planning to retire. But God forbid what happens if I die and this position is left open let's create a plan upfront and [be] intentional … to put into place … even [if] it's … where it needs to be an intentional interim … that's been trained to ask those question and to lead them in a good manner towards Godly things.

Dalton examined the role the associate pastor can take in personal preparation especially with the inevitability of transitions. He said,

> … know your gifts and skills … do the hard work of self -discovery, do the different personality tests and do the gifts and spiritual gifts tests, do some … life-coaching or something like that to where you start to understand who God has made you to be and what your gifts and skills truly are. And go to people who … can be really honest with you and say I don't think you've got this but you have that … [know] how the Lord's gifted you so that you can be prepared if that call comes.

Change the call process. Most of the associate pastors interviewed really wanted to share their advice to assist other associate pastors who were either going through a transition period or would be potentially in their futures. However, some of the pastors directed their concerns and advice to the denomination's organizational leadership. Within these comments, there was a sense of frustration at the perceived lack of direction and involvement of those higher up in the organization, the slowness of the process, and what was seen as an outdated structure.

Laurence believed that more "points of contact" with the different congregations throughout the process would be of great benefit for those congregations. Mitchell went further with this issue of lack of presence on the part of the denomination's organizational leadership. He said,

> I know we are congregational in structure or polity, but we do have some hierarchy. And we have great servant leaders in many of our districts. And when there is a vacancy we need to really have well trained (denominational organizational leader) who you can count on to be present, not someone who says call me if you need something, because there was a lack of real presence and significant leadership given there …

Austin continued addressing the deficits within the structure of the denomination's current call process. He noted,

> You know, it seems like our only succession plan for most congregations and (denomination's organizational structure) is a guy takes a call, he cuts all ties, he leaves. And that's it. And when a guy who had been handling virtually everything cuts all ties and leaves, it just leaves a congregation just sort of dizzy with, "Wow. We had no idea who did all these things," or, "We've never had to think about these things before because he always did it for us."

A lack of timeliness on the part of the denomination's organizational leadership was a concern for Mason. He said, "… beginning the call process, the paperwork, don't hang onto it … I know they're busy … they wanna make sure there's adequate time for issues to be worked through … but, work with expediency."

Bobby noted that the denomination's organizational leaders from the different geographical regions had varying methods in which they handled the process. Bobby believed that "more guidance" is needed throughout the regions. Jim touched on this as well by saying, "… I don't see any consistency in how they're (denomination's organizational leadership) helping the church go through their transitioning."

Lastly, Dalton spoke at length about his dissatisfaction with the call process. He said,

> I think that the (protestant denomination) … puts blinders on when it comes to the call process and one of the biggest things that I heard was you had a group of people who said this is all led by the Holy Spirit so don't worry about it, you don't have to think about it, don't have hard conversations … the Lord will simply lead … And the reality is it's just stupid … It's stupid because all of a sudden you throw this guy into a situation where he's gotta work with people day-to-day and there might be some serious personality conflicts … so my hope will be that our (denominational leadership) and our church body … would really start to adopt an approach that recognizes that calling a pastor is as much about the right hand kingdom as it is about the left hand kingdom. We want him to come and fulfill the right hand kingdom in proclaiming the good news of Jesus Christ and shepherding the people. But as a senior pastor … 60 percent of your responsibilities are left hand kingdom … you gotta manage staff, you gotta make sure that the budget's on task … And the larger the organization the greater the pressure in the left hand kingdom there is. And so if we don't do a good left hand kingdom work in looking for a good senior pastor we're just setting ourselves up for failure or a lot of heartache and struggle.

Summary of the Chapter

This chapter presented the cross case analysis of the 15 associate pastors participating in this study. The study examined how these pastors, while serving as internal interims, perceived and processed their interim experiences, both during and after serving in the transitional periods within their respective congregations.

According to Daft and Weick (1984), perceptions, interpretations, and actions make up the core of sensemaking. Therefore, it was initially important to establish the background setting for the associate pastors' sensemaking for the 15 associate pastors. Next, the four themes that emerged that significantly impacted the way the pastors perceived and processed their time as an internal interim were presented along with their respective sub-themes These four themes were: the lack of direction given to the associate pastors during the transition periods, the contentious call process, how the

associate pastors made sense of their experiences, and the recommendations and advice that the associate pastors shared for other associate pastors, as well as, the denomination's organizational leadership.

Most of the associate pastors reflected back on their interim experiences with a great deal of disappointment and hurt due to the way they were treated throughout the process. There was also a great deal of frustration with the lack of communication or miscommunication that took place during the transition period. Out of the 15 pastors interviewed, 8 of them had already taken a call to another congregation or were in the process of taking a call.

Yet, though the experiences were negative overall for most of the pastors, all of the pastors seemed to feel that in many ways they grew both personally and professionally through their experiences. Most of all, a renewed reliance and trust in God emerged as a critical sub-theme associated with how they made sense of their experiences which guided each of the pastors as they processed their internal interim experiences during the transitional periods and moved forward in their careers.

The next chapter will discuss the findings relative to the existing literature on succession planning and internal interims. It will also provide conclusions and implications for practice and address pathways for future research.

Chapter 6 – Discussion, Conclusions, and Implications for Practice, and Future Research

Introduction

This chapter begins by providing a brief summary of the study. It then discusses the findings that were derived from the data analysis, as presented in Chapters 4 and 5, and situates the findings within the existing literature. Next, conclusions are then presented followed by an articulation of the implications for practice. Limitations and recommendations for future research are then discussed and the chapter concludes with a summary.

Summary of the Study

The purpose of this study was to explore how associate pastors serving as internal interims perceived and processed their interim experiences both during and after serving in those transitional capacities within their respective congregations. Steinke acknowledged that "transitions disrupt patterns" (Nicholson, 1998, Foreword). Since transitional periods are associated with change, employees tend to be more sensitive on personal levels to the possible negative impacts that the change will have on their employment relationships (Chaudry et al., 2009). If employees perceive these employment relationships in a negative manner, then they are increasingly likely to engage in sensemaking which is a systematic cognitive processing of the situation (Chaudhry et al., 2009; Louis & Sutton, 1991).

Drawing upon sensemaking as the theoretical grounding for this research study about internal interims and how these associate pastors not only perceived their roles as interims, but also how they further enacted their roles based on these perceptions was

explored (Browning & McNamee, 2012). Along with personal characteristics such as prior experiences and previous decisions, sensemaking shapes the subsequent actions that employees take at the conclusion of their temporary tenures (Browning & McNamee, 2012). Therefore, this study also examined how serving as internal interims influenced these associate pastors' future career decisions following their interim experiences.

The study was guided by the following research question:

How do internal interims perceive and process their interim experiences both during and after serving in a transitional period within their respective organizations?

The design of the study was a qualitative phenomenological multiple-case embedded case study approach (Creswell, 2013, 2014) as this allowed the study to more fully understand the essence of the lived experiences of the phenomenon (Creswell, 2007). In addition, the utilization of a case study approach allowed for the "exploration of a phenomenon within its context using a variety of data sources" thereby ensuring "that the issue is not explored through one lens, but rather a variety of lenses which allows for multiple facets of the phenomenon to be revealed and understood" (Baxter & Jack, 2008, p. 544).

The study used a purposeful criterion sampling strategy of associate pastors serving within a particular protestant denomination. These pastors were identified to have served in multi-pastor congregations in the capacity of associate pastors at the time in which the senior pastor positions within their congregations became vacant. Upon the vacancy of the senior pastor positions, the associate pastors served as internal interims to fill the roles and responsibilities of the senior pastor positions until a permanent replacement was found for the senior pastor positions. The associate pastors were not

initially selected to fill those senior pastor positions. Additional criteria for participation included that a maximum 8 year timeframe had elapsed from serving as internal interims, thus ensuring that the associate pastors had sufficient time to process their experiences during and after the transition of having served as internal interims. Lastly, these associate pastors had to be geographically distributed throughout the United States to ensure maximum coverage of congregations within this denomination.

Semi-structured interviews were the primary method of data collection. Interviews are increasingly being used in qualitative research as the principal technique for data collection (Aborisade, 2013; Cooper & Schindler, 2006). The use of the semi-structured interview format allowed for the interviewees to have a degree of leeway in how they responded (Bryman & Bell, 2011) and allowed them the possibility to more fully share their stories (Feldman et al., 2004). Fifteen pastors representing various geographical regions across the United States were interviewed using Skype. All 11 of the interviews were recorded and transcribed verbatim with the permissions of the associate pastors. Field notes were taken during and following the interviews. The researcher was also able to perform some observations through the use of Skype and such observations were also recorded during and following the interviews by the researcher.

Interpretative phenomenological analysis (IPA) (Smith, 2004; Smith & Osborn, 2003) was used to analyze the data and allowed for a fuller portrayal of the interims' experiences. Interpretative phenomenological analysis strives to make sense of the personal experiences of the participants within a research study through the analyst (Pringle et al., 2011; Smith, 2004). To ensure validity and reliability from a qualitative

tradition, the researcher used member checking, peer and colleague examination, and an audit trail.

Discussion of the Findings with the Existing Relevant Literature

This section discusses the results of the data analysis and relates these findings to the existing relevant, but limited, literature. The findings are then used to interpret the conclusions presented in the study.

As Table 2 illustrates, the researcher discovered four major themes and their respective sub-themes that were consistent throughout the data. The themes that emerged were: lack of direction that the associate pastors experienced when serving as internal interims during the transitional periods within their congregations, the contentious call process and how this process was handled during the time of the vacancies, how the associate pastors made sense of their interim experiences, and the recommendations and advice that the associate pastors shared for fellow associate pastors and the denomination's organizational leadership.

Table 2

Emergent Themes and Their Respective Sub-Themes

Lack of Direction • Lack of Role Clarity • Lack of Leadership Preparation
The Contentious Call Process • The Political Nature of the Call Process

(continued)

- The Lack of Transparency of the Call Process
- The Emotional Upheaval Attributed to the Call Process

Making Sense of the Interim Experience

- Growth and Learning
- Trust in God

Recommendations and Advice

- Communication
- Preparation
- Change the Call Process

The concept of succession planning is not a new concept for organizations (Mastowski, 2013). The reality is that all organizations will face the potential loss of key personnel at some point and will need to replace them (Friedman, 1986; Russell & Sabina, 2014; Schweizer & Patzelt, 2012). Organizational leaders and other key personnel often depart unexpectedly for both voluntary and involuntary reasons including retirement, termination, or death (Santora & Sarros, 2012). When such departures occur, periods of transition are inevitable and are major events within the life of organizations and they have an impact on the entire organization (Santora, Caro, & Sarros, 2007; Watson & Fansler, 2009). Therefore, succession planning, which establishes a deliberate and systematic process with the intent to identify, develop, and retain those individuals who are able to implement the current and future goals of the organization through the

use of their array of leadership competencies is of critical importance (Lacey, 2003; Rothwell, 2011).

Yet there seems to be a historical disconnect between how organizations view the importance of having a succession plan and the actual actions that organizations have taken toward the development and implementation of a well thought out succession plan (Froelich, McKee, & Rathge; 2011). Most organizations do not have a plan in place to address the loss of key personnel when these unexpected changes occur (Garg & Weele, 2012). Such lack of succession planning can have dire consequences for organizations given the accelerated changes within the global economy that are demanding more highly skilled labor (Galagan, 2010), and the potential of a large segment of the labor force retiring (Froelich, McKee, & Rathge, 2011; McDonald, 2008). Therefore, it has been acknowledged that "Finding qualified, motivated leaders to fill all the vital executive positions vacated by this generation is going to present pressing challenges for many organizations, nonprofit and for-profit alike" (Froelich, McKee, & Rathge, 2011, p. 4).

For non-profit organizations, the challenges of effectively managing times of transitions are even more difficult due to the unique nature and focus of these institutions (Balser & Carmin, 2009), the relentless and changing demands of society (McKee & Driscoll, 2008) and the increasing needs of people for the services of the non-profit sector (Allison & Kaye, 2015; Newman & Wallender, 1978; Smith & Lipsky, 2009). Typically, non-profits in general often do not have the resources, structure and sophistication of many for-profit organizations. Therefore, the installation of sound processes and procedures can serve to assist these institutions in avoiding the crises that arise from management transitions (Santora & Sarros, 2012). While most non-profit organizations

seem to be aware of this information, they still largely fail in developing an organizational structure that prepares future successors for the position (Santora, Caro, & Sarros; 2007).

Succession planning and the use of internal interims to serve as temporary replacements, have very unique dynamics when framed within the context of religious organizations, specifically churches. Religious institutions are considered some of the longest-living organizations in the world. However, they are still beset by a multitude of challenges and limitations in today's global economic environment (Ershova & Hermelink, 2012; Fritz & Ibrahim, 2010). One of those unique challenges is that during transitional periods when key personnel depart, interims are not simply filling vacated positions, they are likely stepping into positions of spiritual leadership in which they might be called upon to serve as a confidant, officiant, counselor, mentor, or some other role that plays an important part in the lives of others (Dollhopf, 2013). Therefore, the utilization of interims poses important considerations to the deliberation process of congregations (Jethani, 2005).

The lack of attention to succession planning and the challenges associated with using the temporary replacement strategy of using internal interims are evidenced in the findings of this study. In the protestant denomination studied, the associate pastors acknowledged that the reasons for the vacancies of the senior pastor positions were both expected and unexpected. These reasons included retirements, reappointments/promotions, death, and termination. All of these reasons for vacancies of key personnel have been previously articulated in the succession planning literature (Gothard & Austin, 2013; Rothwell, 2011; Santora & Sarros, 2012). However, given

that, in general, the average tenure of pastors in protestant denominations at any given congregation tends to be less than 4 years (Rainer, 2005, 2014), the need to more adequately plan for such potential vacancies is critical but appears to be overlooked in this denomination

In addition, as was found in this study, not only were there not succession plans established in the congregations, the replacement strategy of using internal interims was also problematic. Research has shown that the utilization of interims to fill vacated positions is becoming more of an accepted practice by industry experts during transitional periods of key personnel within organizations (Ballinger & Marcel, 2010; Mooney, Semadeni, & Kesner; 2012). It is thought that the use of interims is reasonable because those who fill such positions should have the basic knowledge and skills to effectively perform the tasks of the positions they are working in (Rothwell, 2011; Ryan 2015).

However, the majority of the associate pastors acknowledged a lack of direction, which was manifest in terms of a lack of role clarity and lack of leadership preparation leading up to and during the time of the senior pastors' vacancies. The associate pastors indicated that, in 14 of 15 instances, little information was written down or conveyed that might provide associate pastors with any insight about the required responsibilities associated with the senior pastor role. Therefore, not only was there a lack of succession planning within these congregations, there was also a lack of detailed descriptions about the senior pastor role, expectations, and responsibilities that might guide those associate pastors expected to serve as temporary replacements.

Research has also shown that most employees who assume or are appointed the role of internal interims may anticipate and therefore have strong hopes and desires that

the roles will segue into permanent positions (Brophy, 2006; Browning & McNamee, 2012; Gossett, 2001; Rogers, 1995). Aspirations on the part of internal interims to obtain the positions that they are filling on a permanent basis has been cited often in temporary and leadership literatures as a significant motivating factor (Browning & McNamee, 2012). Interims tend to have their own perceptions of their career progression prospects based on their serving as an interim within an organization (Seymour, 2008). Consistent with the literature, the findings from this study established that 13 of the 15 pastors interviewed either actively wanted the position of senior pastor or were open to the possibility of being called to the position.

In the protestant denomination studied, the search process is referred to as the call process which is used to identify permanent replacements. All 13 of the associate pastors who indicated a desire to be contenders for the senior pastor positions, at a minimum, believed that they would be given serious consideration for the positions through the actual call process. Yet, the findings from this study suggested that there was an inconsistent approach used across all of the congregations where the associate pastors were serving as internal interims, along with limited direction from the denomination's organizational leadership regarding the call process which articulates how future replacements are determined.

The findings from this study revealed a contentious call process that was political, lacked transparency, and created emotional upheaval that was detrimental to those serving in the interim roles. The study found that out of those 13 associate pastors who were engaged in the call process, 7 of them had terrible experiences, 4 of them had neutral to negative experiences, and only 2 of them considered it to be a positive

experience. Of the pastors who had terrible experiences, phrases like "was lied to," "lack of support," "frustration," "the process was unfair," and "a lot of politics" were used to describe how the associate pastors perceived the call process. In addition, 6 out of the 7 pastors who had terrible experiences eventually took calls to other congregations, all for the senior pastor positions.

Furthermore, for 11 out of the 15 associate pastors interviewed, their exposure to the call process resulted in a degree of emotional upheaval that resulted in many of the associate pastors feeling tremendous disappointment, hurt, and distrust in others. As a consequence, such contentious processes impacted the desire of the associate pastors to remain in their congregations and to return to their former associate pastor positions. In this study, 8 of the associate pastors actually left their congregations, creating the need for more replacements, thus further exacerbating the lack of succession planning in the congregations and by the overall denomination.

Research on internal interims within the non-profit sector is currently limited, particularly with regard to the sensemaking experiences of such interims. Therefore, examining the experiences of internal interims in a religious context through the lens of sensemaking offered fruitful contribution to the currently limited literature on interims in the non-profit sector. With regard to sensemaking, in general, existing literature tends to be lacking with regard to the various negative relational experiences that internal interims encounter during their tenures as interims (Browning & McNamee, 2012). In addition, because "… internal interims are still largely neglected in scholarly and trade publications …" the question becomes how do these individuals perceive the circumstance they are working in, how does it impact their perception of themselves, and

what role does it play in determining their ensuing actions (Browning & McNamee, 2012, p. 730)? The findings from this study add insights to the limited literature about how the associate pastors perceived their experiences and the actions that they subsequently took regarding their career paths.

The associate pastors interviewed did a lot of reflection on their experiences of serving in their interim roles. Most of what they shared was how they perceived the experiences impacting them from a growth and learning perspective, despite some of their negative experiences. Upon reflecting on and making sense of their experiences, all of the associate pastors shared how they grew professionally during their transitional experiences as serving as interims from becoming better speakers, to having more confidence in leading, to having a better understanding of the various skills and talents needed to be a senior pastor, and becoming aware of the talents that they possessed, or areas in need of improvement. From a personal growth standpoint, the associate pastors discussed how they addressed the hurt and disappointment they felt with the way the call process transpired, the way they handled their own shortcomings, and how the experiences helped them to be better leaders into the future. Considering growth from a relational aspect, some of the associate pastors shared how their experiences impacted them both positively and negatively as husbands, fathers, and as leaders in their churches and communities. Lastly, all of the associate pastors engaged in conversations about spiritual growth through a greater trust and reliance on God and how the process challenged them on many levels when it came to their beliefs that God was in control of their situations.

Dollhopf (2013) stated that, "Times of leadership transition for organizations, including congregations, are not only disruptive but are crucial moments for establishing organizational direction, roles, and identities for both the organization and the new leader" (p. 676). Mead also (2012) believed that these periods of key personnel transition in religious organizations are an opportunity for these organizations to grow and develop if the appropriate time and commitment is given to the succession. He contended that, "The period between pastors is a time of growth and development that can lead to a much stronger congregation – if the time is taken to do the work well" (Mead, 2012, p. 22). Lastly, Jethani (2005) concurred stating, "Planning ahead for succession matters … How well a church plans for leadership transition may determine its long-term health" (p. 51). As the findings from this study suggest, critical attention was not given to succession planning or the replacement strategy of using internal interims, resulting in considerable emotional distress, thus making the transitional periods more challenging, not only for the associate pastors, but also for the congregations themselves.

As a consequence of the experiences of the 15 associate pastors they had a wealth of advice to share for others who are or might be experiencing some of the scenarios within their respective congregation. Consistently, these associate pastors espoused the need for better communication and to have directions written down regarding the expectations of the senior pastor roles and responsibilities. There was also a strong directive for associate pastors to be upfront and honest regarding their future intentions for the vacated positions and how to anticipate reacting and responding should they be denied the positions on a permanent basis. Lastly, the associate pastors continually

brought the focus back to the spiritual realm by stating that associate pastors need to be to be faithful to their calling, constantly in prayer, and trusting in God.

With regard to aspects of the succession planning process of the denominations, the call process, the associate pastors discussed the need for greater communication, direction, and teaching from the denomination's organizational leadership with both the individuals serving as interims and the congregations as a whole. Also, there were several associate pastors who addressed the relevancy of the call process in the way it is being utilized in today's society. They recommended reassessing the call process to better determine how an archaic system can be updated but yet still encompass its foundational reliance on the Holy Spirit's direction. As one associate pastor noted, "Transitions matter … Let's be smart."

Conclusions and Implications for Practice

The loss of key personnel and the need to replace them are challenges and opportunities that all organizations must contend with (Friedman, 1986; Russell & Sabina, 2014; Schweizer & Patzelt, 2012). Due to this reality, organizations need to prioritize succession planning so they are better prepared to meet both the expected and unexpected changes that are present in the global economy (McDonald, 2008). These realities were witnessed in the 15 interviews conducted with the associate pastors that participated in this study given that each of the associate pastors were serving in congregations when the senior pastor positions became vacant. Yet, 14 out of the 15 associate pastors highlighted a lack of any type of succession preparation established thereby leading to uncertainty of the associate pastors and their respective congregations with regard to the next steps to be taken.

Not only do organizations need to be cognizant of the eventual loss of key personnel and be prepared by having succession planning processes and procedures in place for these periods of transition, they also need to be prepared for how they will utilize the individuals who will temporarily fill the vacated positions, the interims. Hall (1995) stated that there is a "… need for greater clarity about roles and terms of office" (p. 88) when it comes to using interims. Yet, the associate pastors that were interviewed for this study consistently noted that they received little if any guidance or direction with regard to what was required of them as they assumed the role and responsibilities of the senior pastor positions. In addition, 8 of the associate pastors felt like the former senior pastors and the congregational leadership did not adequately prepare them for the senior pastor positions.

Ahmadi, Ahmadi, and Abbaspalangi (2012) indicated that a failure to establish the processes and procedures of a well thought out succession plan can lead to various difficulties such as the departure of active leaders within the organization. This study revealed that the process for determining permanent replacements, used by this protestant denomination, the call process, was not well thought out nor effective. Out of the 13 associate pastors engaged in the call process, 11 of them had a negative or, at best, a neutral experience with the process. Out of the 7 associate pastors that had negative experiences, 6 of them moved on to other congregations. For the 4 pastors that had neutral experiences, two of them moved on to other congregations. The reality that 8 of the associate pastors interviewed had already left their congregations for other churches was substantial. The associate pastors' former congregations were faced with addressing vacancies, as well as, dealing with the loss of knowledge, skills, and relational

connections that the former associate pastors had established while serving in their respective congregations.

In summary transition periods are going to take place in all organizations and these periods are going to have a direct impact on the lives of the people who are called upon to fill the vacated positions. Well thought out succession plans allow for organizations to do a better job of making the transitions a healthier experience for all of those involved.

The associate pastors in this study agreed upon these points and shared that the current call process of their protestant denomination, though grounded in God's Word, was missing functionality and relevance within the "left hand kingdom" which refers to the role of Christians in the world. They believed that addressing the structure of the call process, adding better communication between the denomination's organizational leadership and the congregation, and better leadership development and preparation for associate pastors who might experience these periods of transitions would be beneficial to both the associate pastors and the congregations as a whole.

As Mead (2005) noted, “When transitions happen, life changes. We can help some of those transitions have saving power rather than damning power” (p. 92).

Implications for Practice

The following section describes the practical implications of this study for a variety of stakeholders: associate pastors, senior pastors, the congregations within the denomination, the leadership of the denomination, and for those who may be tasked with human resource development responsibilities within the congregations or denomination.

Associate Pastors

In most cases, associate pastors will assume the roles and responsibilities of the senior pastor positions upon their vacancies. Therefore, it is imperative that associate pastors better prepare themselves for the temporary replacement positions both before and during these periods of transition.

In general, associate pastors should be constantly learning what the role of the senior pastor entails and how to go about effectively serving in those various capacities. Since most learning in the context of work occurs informally and on the job, open conversations with the senior pastors, requests for mentoring, observation, potential sharing of tasks and job duties, and consistent feedback may help associate pastors to develop a deeper level of trust with their senior pastors and allow for greater periods of learning. These periods of gaining new skills and insights into the dynamics of the senior pastor positions would help the associate pastors to become more prepared to fill the positions if they become vacant.

In the instances of a senior pastor vacancy, the tendency is for the associate pastors to automatically assume the role and responsibilities of the position. Associate pastors need to have honest conversations with the congregational leadership in advance of taking over the roles of interims. Good communication and having clearly articulated guidelines regarding the roles and responsibilities and expectations will assist both the associate pastors and the churches' leadership on what needs to be done and by whom thereby allowing greater accountability and a clear understanding of responsibilities so that such periods of transition can avoid becoming disruptive and potentially detrimental to the congregations.

Additionally, the associate pastors need to have honest conversations with themselves, as well as trusted individuals with regard to their desires to be included in the call process to be the next senior pastors. If the desires are such that the associate pastors wish to be considered, honest and direct conversations need to take place between the associate pastors and the churches' leadership. Associate pastors also need to process in advance how they will handle the possible rejection by the call committee or the congregation at large for another individual to be the senior pastor. Careful reflection in advance removes some of the potential hurt and frustrations that may occur later on as evidenced in this study.

Senior Pastors

Although there is mixed research on the role leaders should have in selecting their successors (Austin & Salkowitz, 2009; Cingoranellí, 2009; Greer & Virick, 2008; Groves, 2007; Valentine, 2012), there are still many ways in which senior pastors can be of great service to both the associate pastors who will more than likely fill their positions as interims during such vacancies, as well as, to the congregations as a collective.

The majority of the associate pastors interviewed acknowledged that they received little to no training, coaching, mentoring or leadership preparation from their senior pastors, which reflects poorly on the process of succession planning. Senior pastors have an obligation to invest in those placed under them with the realization that these individuals may one day be called upon to fill their positions.

Senior pastors should serve as mentors for the associate pastors. There should be a focus on letting them be involved in the different roles that senior pastors are engaged in and then allowing them to experience these various tasks under the guidance of the

senior pastors. In doing this, the associate pastors may learn and grow from being involved in these opportunities and thereby become more prepared in the case of vacancies in the senior pastor positions. This serves to benefit not only the associate pastors, but the congregations as well. In this way, the senior pastors still continue to impact the life of their congregations in positive ways even after they are no longer with their respective congregations.

Congregations

The development of effective succession planning processes and procedures is critical in the rapidly changing environment in which organizations find themselves in. The potential opportunities that are made possible when a well thought out succession plan is established are evident by those organizations that are using such a process. Yet, outside of engaging an antiquated search process referred to as the call process, and using associate pastors as temporary replacements, most congregations in the protestant denomination studied do not have any form of succession plan established when senior pastor vacancies occur.

Congregations can become more proactive in preparing themselves for the eventual vacancies of the senior pastor positions. First, congregations should be informed on how the call process works and have a transparent and clearly communicated step by step process they will institute when the position becomes vacant. Having individuals from the denomination's organizational leadership present to teach the congregations how to transparently implement a call process and to share information of the various alternative opportunities available should it be determined that associate

pastors not serve as internal interims (Intentional Interims, Vacancy Pastors, etc.) during periods of vacancy are great first steps in being prepared.

Next, the congregational leaders should have expectations and requirements written down in the event that the associate pastors have to fill the roles and responsibilities of the senior pastors during times of transition. Trying to process what needs to be done on the spur of the moment, especially in the case of an unexpected vacancy, is not effective. Congregations need to think and plan ahead accordingly.

Congregational leaders also need to be proactive in working with the senior pastors in preparing the associate pastors for the potential of vacancies. Establishing expectations and feedback helps the senior pastors in their engagement with the associate pastors with learning opportunities.

Lastly, the congregation can be of great assistance to those associate pastors filling the role and responsibilities of the senior pastor positions during a period of vacancy by remembering that this is a traumatic, high stress period. By fostering open and consistent conversations, providing genuine encouragement, and thoughtful understanding, the congregations can assist the associate pastors to help them perform effectively in healthy environments during such transitions.

Denominational Organizational Leadership

The denomination's organizational leadership can play an instrumental role in assisting associate pastors and congregations during this time of transition.

From the vantage point of associate pastors, those interviewed wanted the leadership to remember that these are real people who are placed in difficult situations and they need the support of those in the denomination's leadership positions. There has

to be better and more consistent communication, as well as, a system of consistency in how interims are handled so the associate pastors know what to expect and who to go to for information and assistance. In addition, more needs to be done for associate pastors in seminary and during their fieldwork to help prepare them for potential times of transitions.

With regard to congregations, the denomination's organizational leadership needs more points of contact to be established to ensure that questions are answered, information is effectively disseminated, and the transitions are proceeding in a healthy manner. Many of the associate pastors interviewed in this study felt that there was a real lack of presence from the denomination’s organizational leadership during these periods.

Next, the denomination's organizational leadership should consider a form of exit counseling for those associate pastors who leave their congregations for another church after serving as interims but who did not receive the senior pastor positions on a permanent basis. A deeper understanding of the of the experiences that the associate pastors went through leading up to, during, and after the interim period will assist the denomination's organizational leadership in providing better direction and support for the associate pastors and the congregations.

Lastly, with regard to the actual call process, many of the associate pastors interviewed were adamant that the denomination's organizational leadership needs to really assess the utilization of the perceived antiquated call process as part of succession planning processes. Some believed the process is "stupid" because it does not consider all the different dynamics that happen in filling vacated senior pastor positions. Also, it was mentioned that the way the call is interpreted gets in the way and people suffer

because of it. The organizational leadership within the denomination needs to more thoughtfully examine the call process and how replacements are determined to foster a fair, transparent, effective, and healthy process.

Organizations would do well to understand that transitions are truly traumatic periods and the impact on those interims based on the decisions the organization make has a far reaching and potentially long lasting effect. Organizations that do succession planning well understand the value of these interims and therefore, the impact of transitions are less volatile to all of those involved because everyone understands the processes and procedures and how to address the transitional period purposefully.

Human Resource Development Professionals

Many of the associate pastors spoke about how their professors in seminary could have better prepared them for the reality of serving in congregations and the various dynamics that they might encounter. Though each pastor does "fieldwork" at a congregation during their time in seminary and then serve a year internship at another congregation, the associate pastors felt that these experiences were inconsistent based on which pastor served where for their "fieldwork" and internship. With an inconsistency in the practical experiences that associate pastors were being exposed to made it difficult to determine how effective these periods of training actually were for the associate pastors before graduating and accepting their first calls.

The next area that professors can assist future pastors is being better prepared in the realm of "left hand kingdom" responsibilities. Though pastors focus a lot of their attention on the spiritual aspects of their profession, they also have many business related responsibilities they have to perform. These can include: managing staff and preparing

budgets to recruiting and training volunteers. When pastors are not trained to succeed in these areas as well, it tends to present various difficulties for them as they attempt to perform "right hand kingdom" work. Therefore, teaching pastors to perform various leadership and management tasks that are present in non-profit organizations will help them to succeed in both "kingdoms."

Lastly, professors at the seminaries are encouraged to help future pastors have an unwavering focus on what their actual roles are within the church. Too many times pastors lose sight of who they are and what they are about. They find themselves caught up in the title, history, and tradition of the positions, but miss the primary focus of their positions which are to preach the good news of Jesus Christ and administer the sacraments. Professors have the opportunity to inspire, teach, and mentor pastors before they graduate, but they need to challenge the pastors to consider what being a shepherd of God's people truly means.

Serving in ministry is a difficult profession. Yet, seminary professors have the perfect opportunity to create a powerful learning environment that allows future pastors to be more successful in all aspects of their profession. In addition, when pastors are doing their job well it then has the ability to positively impact the life of their congregation as well.

Limitations and Recommendations for Future Research

This study, as with all research studies, has several limitations that should be acknowledged. The experiences of a modest purposefully selected sample of all-male associate pastors within a very specific religious protestant denomination were solicited. Thus, it is not possible to claim that their experiences reflect other similar individuals

within other religious denominations. Also, due to the specific biblical understanding of this protestant denomination, all pastors are male, whereas other denominations may involve females in pastoral roles. Therefore, this may limit the generalizability of the findings due to other religious non-profits utilizing both males and females in the pastoral role. However, although qualitative research is not intended to be generalizable, it is possible that, with thick, rich description, readers of this study can determine the extent of user generalizability.

In addition, all interviews were conducted via Skype. This approach enabled the researcher to interview individuals from various geographical regions within the United States, thus allowing the researcher to benefit from cost efficiencies as well as provided ease of access and also allowed the researcher to be able to see and hear the participants interviewed. However, it is possible that here was some degree of observation that was lost by not having the ability to interview participants face-to-face. Face-to-face interviews would have been optimal if possible.

Next, it is also possible that the type of experience the associate pastors went through during their time as interims impacted their desire to participate in the research. It is possible that those associate pastors that had negative experiences were more likely to agree to participate as opposed to those pastors who had positive experiences.

Lastly, the role of the researcher may have introduced some potential biases given his familiarity with the denomination. Member checks with the participants were utilized to ensure that the accuracy of the associate pastors' experiences were accurately captured and interpreted. The researcher also engaged in peer and colleague examinations to minimize the potential of such bias.

With regard to pathways for future research, the purpose of this study was to explore how internal interims perceived and processed their interim experiences both during and after serving in a transitional period within their respective organizations. Since the study was based on associate pastors that did not obtain the positions of senior pastor on a permanent basis, future research should study associate pastors that did become appointed to the senior pastor positions and how they perceived and processed their experiences as internal interims.

Secondly, due to a variety of different reasons for the senior pastor positions becoming vacant (retirement, death, moral failure, etc.), further research into the reason behind the senior pastors' departures should be conducted to examine the impact these departures had upon the associate pastors, as well as, the way the congregations moved forward to fill the vacated positions. It would also be insightful to better understand the relationship dynamics between the associate pastors and senior pastors given the relatively poor relationships that were articulated in this study.

Additionally, further research should be conducted to examine how the emotional turmoil of the interim experiences impacted those associate pastors who left their congregations for other congregations. Specifically, research should delve into how these associate pastors, if they are now senior pastors, conduct their relationships with associate pastors that may be present in their current congregation. In addition, a further examination into whether any of these associate pastors left the ministry due to the hurt they experienced during the interim period would be a topic for additional research along with what role resiliency plays in the lives of these pastors.

Next, being that only one protestant denomination was utilized for this research an exploration into other protestant and non-protestant denominations would add more insight into the experiences of internal interims. This would especially be of interest as other denominations have differing polity with regard to how they fill vacated positions, as well as, the addition of possible females being considered in some of these protestant denominations.

Further, a deeper exploration of how internal interims perceive and process their experiences in other non-profit organizations that are not religious based would be of great benefit. This is suggested because, in this study, most of the associate pastors interviewed delved into their relationships with God as one of the major themes that presented itself in their processing of their interim experiences. Outside of a religious organizational context, are there different areas that these individuals gravitate toward to assist them in their processing of their experiences and how does that impact them long-term regarding their careers. Lastly, exploring the experiences of other types of interims (i.e. intentional interims) is recommended.

Summary of the Chapter

This chapter began with a summary of the study which included the purpose of the study, the research question that guided the study, the data collection approaches, and the procedures that were used to analyze the data. Next, the chapter discussed the findings in relation to the existing, but relatively limited, relevant literature. Conclusions of the study were then stated in conjunction with the findings that have implications for practice for a variety of stakeholders. Limitations were then discussed. Lastly, the chapter concluded with recommendations for future research.

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Appendix A: The University of Texas at Tyler IRB Pilot Study Application

THE UNIVERSITY OF TEXAS AT TYLER

INSTITUTIONAL REVIEW BOARD

EXPEDITED RESEARCH APPLICATION

IRB: Sp2016-90
Approved by: G Duke
Date: March 29, 2016

To qualify for expedited review research must present no more than minimal risk to human subjects and cannot explore sensitive topics. In addition the research must fit the categories of expedited research, per OHRP regulations.

Attach (electronically) with this application:

- Written consent form using the UT Tyler Consent Template unless a waiver of written informed consent is requested
- Signature page of Thesis or Dissertation Committee members showing proposal approval
- Brief research proposal that outlines background and significance, research design, research questions/hypotheses, data collection instruments and related information, data collection procedures, data analysis procedures. **Most of this can be copied and pasted to relevant parts of the application but please keep B & S brief for the application.**
- Human Subject Education Certification for PI, co-investigators, and research assistants participating in recruitment, data collection, data analysis, or, if they have any exposure to identifiable data (if training has not been completed at UT Tyler within a 3 year period of time)
- Tool/instrument/survey; if copyright or other issues prohibit electronic form, submit one hard copy

DATE: March 24, 2016

Principal Investigator	Chapman Darius M. (Last) (First) (MI)
PI Title and Credentials	☐Assistant Professor ☐Associate Professor ☐Professor ☒ Student ☐Other

Faculty Sponsor Name and Email if PI is Student	*Dr. Andrea Ellinger* Andrea_Ellinger@uttyler.edu *[Dissertation Chair] Dr. Rochell McWhorter* RMcWhorter@uttyler.edu *[Committee Member and Methodologist]*
PI Phone PI Email	*586-925-9599* *bochapman@juno.com*
Co-Investigator(s)	*Click here to enter text.*
Co-Investigator(s) Email and Telephone	*Click here to enter text.* *Click here to enter text.*
Secondary Contact Person in Absence of PI	*Click here to enter text.*
Secondary Contact Person's Telephone and Email	Phone: *Click here to enter text.* Email: *Click here to enter text.*
Title of Proposed Research	*Click here to enter text.* *SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING ASSOCIATE PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIMS*
Source of Funding	☐NIH ☐Local ☐ Industry ☐ Other Federal (Specify) ☐Other (Specify) *Click here to enter text.*

COMPLETE ALL ITEMS TO AVOID DELAY IN IRB APPROVAL

1. **Designate the category that qualifies this proposal for expedited review** (see UT Tyler Expedited Categories at the end of this application) and justify this designation by responding to the statements below each category

Category # *7*

Information Required for Justification (See specific information under each category)

This research project represents a pilot study that will be conducted in advance of the dissertation proposal. The data gathered during this pilot study will be obtained through the use of semi-structured interviews which will be audiotaped, transcribed verbatim, and analyzed with the permission of pilot study participants. Participation in this pilot study represents no more than minimal, if any risks.

2. For proposals involving Personal Health Information (PHI) data: If this is a retrospective chart review (Category 5) (health records research), or, data involves review of PHI, refer to the IRB's HIPAA policies and procedures in the IRB Handbook and complete any appropriate forms. All can be located on the UT Tyler IRB site: http://www.uttyler.edu/research/compliance/irb/

2a. Does this protocol include the use of PHI? ☐ Yes ☒ No

***NOTE**: If the protocol includes the use of PHI, refer to the IRB Handbook on HIPAA policies and relevant forms that must be completed before IRB approval can be obtained.*

3. Purpose Of Study: *The purpose of this pilot study will be to explore how internal interims perceive and process their interim experience both during and after serving in the capacity as internal interims.*

4. Research Questions: Click here to enter text. The overarching research question guiding this study is: *How do internal interims perceive and process their interim experience both during and after serving in a transitional period within their respective organization?*

5. Brief Background and Significance of Study: *This study is compelling, appropriate, and relevant to the field of Human Resource Development because the topic of succession planning, while considered critical, has been underdeveloped when considering research related to how internal interims make sense of their tenure as an interim once they have returned to their former position without having had the opportunity to obtain the interim position on a permanent basis. Literature has also shown that the individuals who fill these periods of vacancy are often overlooked and this is especially important when discussing how their time serving as an interim affects their personal understanding of their role as an employee within the organization for the longer term. This study will add to and extend the limited base of empirical literature on internal interims by exploring the impact that periods of transition have on those who fill these roles. In addition, this study will address several implications for practice in regards to the unique setting that succession planning and internal interims face within the context of religious non-profit organizations, and specifically within a unique denomination, (denomination name). Non-profit organizations in general, and those in the religious sector typically experience many challenges with succession planning as they frequently have a smaller talent pool compared to for-profit*

organizations, struggle with the ability to cultivate future leaders, an impending leadership deficit, and their apparent lack of consistently developing successful succession plans. Therefore, findings from this study (insights drawn from the pilot and then from the implementation of the main dissertation study) should provide insights about the experiences of internal interims and how such interims can be appointed for succession planning purposes and how efforts can be made to help such interims readjust to their original positions.

6. <u>Population To Be Studied</u>:

a. Ages: *The age range of participants for this study will be approximately 25-75 years of age. The participants will include pastors in the (denomination name) who recently served as an internal interim within a congregation.*

b. Gender: *Only males will be included in this research.*

Explain below if either gender is to be excluded.

Due to the bylaws of the (denomination name), only males may be pastors thereby limiting this research to only men.

c. Are all racial and ethnic groups included? ☐ Yes ☒ No

Explain below if a racial or ethnic group is to be excluded.

It is possible that some racial or ethnic groups may not be represented in this study due to the existing composition of pastors within the (denomination name). It is not the intent of this researcher to exclude any racial or ethnic group but the researcher recognizes that the composition of the sample will largely be contingent upon the racial and ethnic composition of the existing pastors who meet the criteria for

participating in this study, and who ultimately agree to be interviewed as part of the research process.

d. Number of Anticipated Subjects: *2 for the initial pilot study (a minimum of 10 for the main study implementation)*

e. Inclusion Criteria for Sample Eligibility: *This pilot study (along with the main study implementation) will use a purposeful criterion based sampling strategy. All participants must be pastors within the (denomination name) and they must have previously served as internal interims in a congregation for which they were affiliated. In their respective congregations, a vacancy for a senior pastor became available and the associated pastors were asked to serve in the capacity of an interim for the senior pastor position. The pastors selected for participation in this study must meet these stated criteria as well as represent congregations from different geographical locations across the United States. Further, a maximum timeframe of 5 years from the time the associate pastor served in the interim capacity and then transitioned into his former position will be required thereby allowing ample time to process the interim experience. .*

Note: *Any study involving **prisoners** requires a full board review, and may not be approved under expedited review.*

7. Explain the locations or settings for sample recruitment and data collection:

The recruitment of all participants for this pilot study will be from (denomination name) congregations located throughout the United States. These potential participants will be identified by the researcher contacting the district presidents of the (identifying number) districts that comprise the (denomination name) due to the fact that these district presidents will have knowledge of the individuals who would meet the requirements for participating in this research. From those names gathered, the pastors will be contacted by the researcher via email with regard to the purpose of the study. Based on availability and the willingness to participate in the study, 2 individuals will be interviewed for this pilot study. The interviews will be tape and/or video recorded and transcribed verbatim with the participant's permission. Field notes and observations will also be used that will, coupled with the interview transcripts, comprise the dataset for this research project. All videotaped interviews will only be used to capture observations and field notes and no visuals or any identifying information from the videos will be used. The researcher will schedule the interviews which ideally will represent personal-face-to-face interviews. However, given the potential geographical distribution of the participants, the use of technology-mediated approaches for conducting the interviews may be necessary. Such potential technology mediated approaches could include: video chat programs such as Skype, Zoom, or GoToMeeting where both the interviewer and interviewee and can see and hear each other and where recording the interview is possible.

8. Explain from whom permission has or will be obtained from the settings in which sample recruitment and/or data collection will take place:

The researcher will personally obtain permission from those pastors who elect to participate in the study. These eligible pastors will have been previously identified by the (identifying number) District Presidents that comprise the (denomination name) given the President's knowledge of those pastors who have served as internal interims during the vacancy of a senior pastor position.

9. Explain in detail who will be recruiting participants and the sample will be recruited:

The researcher will personally be contacting the pastors who meet the criteria of the research via email. All individuals who consent to being interviewed will be pastors within the (denomination name) and will have previously served as an internal interim in one of the (denomination name) congregations.

10. Copy and paste text below from any flyers, ads, letters etc. that are used for recruitment of participants. In addition, attach any recruitment materials if there are *graphics* or other figures used other than text.

The following information will appear in an email that will be sent to prospective pastors who meet the criteria for the research. Dear _____: My name is Darius Chapman and I am a doctoral candidate in the Department of Human Resource Development in the College of Business and Technology at The University of Texas at Tyler. I am currently conducting research to fulfill the requirements for my doctoral degree. The focus of my research explores how pastors in the (denomination name) process their experiences both during and after serving as an internal interim when the senior pastor position became vacant and the associate pastor became the internal interim during the transitional period. I would like to conduct an interview with you to garner a fuller understanding of some of the different experiences that you may have experienced and processed during your time serving in the capacity as an internal interim and afterwards once you returned to your former position within the organization. The interview is expected to be

approximately 45 to 60 minutes in length and will be conducted via a video chat program (such as Skype or Zoom) or via a personal face-to-face interview. I will have a prepared list of questions relating to the topics previously mentioned and will seek your perspectives about them. I will take notes during the interview process and will seek your permission to record the interview as appropriate and necessary. Collection of your data in this manner will enable me to engage in the interview process as well as to qualitatively analyze the data afterwards. The recorded interview will be kept on a password protected and encrypted computer and any hard copies of materials will be kept securely in a locked file cabinet and will be accessible only to myself, my dissertation chair and methodologist. My dissertation committee is being chaired by and overseen by Dr. Andrea D. Ellinger, Professor in the Department of Human Resource Development at The University of Texas at Tyler and Dr. Rochell McWhorter, also a faculty member at the University who is serving as my methodologist. . Your participation in this research endeavor is completely voluntary, and you are free to withdraw at any time and for any reason without penalty. Your choice to participate or not participate will not impact your role or status at your organizational setting. You are also free to refuse to answer any questions you do not wish to answer. If you have any questions about this research project, please contact either myself, Darius "Bo" Chapman, at 586-925-955 or by email at bochapman@juno.com, Dr. Andrea D. Ellinger

at 903-566-7260 or by email AndreaEllinger@uttyler.edu, or Dr. Gloria Duke, Chair, Institutional Review Board Committee, The University of Texas at Tyler by email Gloria_Duke@uttyler.edu .

Informed Consent

. **Prospective research ordinarily requires written informed consent. If any special classes are eligible to participate, discuss how the consent process will differ. Inclusion of children (under 18 years) requires permission of at least one parent AND the assent of the child (refer to UT Tyler's Policy on Informed Consent of Children)**.

If written consent is to be used, terminology must be about the 8th grade level, or as appropriate for the accurate understanding of the participant or guardian.

If there are questions about the literacy or cognitive level of potential participants, there must be evidence that the participant is able to verbalize basic information about the research, their role, time commitment, risks, and the voluntary nature of participating and/or ceasing participation with no adverse consequences.

Please use the template posted under the IRB forms as a guide, and attach as a separate document with the application submission.

11. This section only for those requesting a waiver or alteration of written informed consent:

Justify the waiver or alteration in accordance with the following four criteria established under 45CFR46.116(d)(1-4).

All four criteria must be met in order to have signed written informed consents. In other words, you must answer "yes" to all four of the criteria below in order to NOT have written and signed informed consents.

If you are requesting a waiver of written and signed informed consent, Indicate "yes" if the statement is true about your proposed research:

1. The research involves no more than minimal risk to the subjects ☐ Yes ☐ No

2. The waiver or alteration will not adversely affect the rights and welfare of the subjects
☐ Yes ☐ No

3. The research could not practicably be carried out without the waiver or alteration,
☐ Yes ☐ No **AND**

4. Whenever appropriate, the subjects will be provided with additional pertinent information after participation ☐ Yes ☐ No.

12. When prospective informed consent is waived, explain how you will obtain permission to use participant's data. If no permission is planned, please explain your rationale.

Click here to enter text.

13. Detailed Data Collection Procedures ATTENTION: Be very specific for this item.

Specify **who, what, when, where, how,** duration type of information for your procedures.
Write this section as if you were giving instructions to another person not familiar with your study.

The individuals who agree to participate in this interview process may be interviewed in person or via video chat technology (such as Skype or Zoom). Initial contact will be made by the researcher, as well as, all arrangements for the scheduling of the interviews. The interviews will be approximately 45-60 minutes in length, and with the participant's permission, will be tape and/or video recorded with field notes and observations being documented as well. It is anticipated that one interview appointment will be necessary but should not exceed three points of contact. It is possible that the researcher may need to obtain clarification of data contained in the interview transcript, which may require additional email or personal exchange. The participants will also be asked to review

their transcripts and to examine preliminary findings as a form of member checking. The data gathered, once analyzed, will be utilized in the researcher's dissertation, as well as, disseminated at conferences or in scholarly refereed publications. It is anticipated that 2 – 4 years will be sufficient to analyze the data, as well as, develop scholarly deliverables that can be disseminated about the findings from this research. Participants will be asked to not identify anyone by name or other manner that could be identifiable.

14. <u>Data Analysis Procedures:</u>

The primary concern of qualitative data analysis is focused on the specific codes, themes, and patterns appearing in the data (Miles & Huberman, 1994). Therefore, each of the interviews will be tape and or video recorded and transcribed verbatim. To maintain a higher level of rigor and robustness, the transcription of each of the interviews will occur within a relatively short time following the interview. In addition, field notes and observations will be taken by the researcher during the interview. Interpretative Phenomenological Analysis (IPA) will be used as the approach for data analysis. The process of IPA is to analyze data on a case by case basis and then later make comparison across all of the cases.

15. <u>Risks and benefits of this research to the subjects and/or society</u>

<u>Risks</u>: *It is not anticipated that participants will incur any side effects or risks associated with this research. The data will be treated confidentially and a pseudonym will be used to mask all identities. No institutional or organizational affiliations will be disclosed. Participants will be asked to never identify another person by name or other way that could be identified*

<u>Benefits</u>: *The researcher anticipates that the insights collected from the interviews will be of interest to the pastors participating in the study, along with the leadership of the congregations, as it is anticipated that the processing the experiences of serving as internal interims can help promote understanding of serving in this capacity along with any adjustments that need to be considered when the interims return to their original positions within the congregation. In addition, the findings of this study will add to the existing sparse literature base on internal interims, and will also add to and extend insights about such roles within the under-studied religious non-profit sector, and specifically the (denomination name) denomination.*

16. **Confidentiality of Data:** Specify how confidentiality will be secured and maintained for research data and/or specimens.

Individuals who consent to be interviewed will be assigned pseudonyms and their identities will be completely masked in terms of their names and organizational affiliations. All recordings, subsequent transcriptions, field notes, and any other respective data will be secured on a password protected and encrypted computer and any hard copies of materials will be secured in a locked file cabinet to which only the researcher has access to. No voice, photos, video recordings will be used in presentations, publications or other public disseminations.

17. **Identifiability of data or specimens**: Will the specimens or data be identifiable?

(NOTE: Any time code numbers are used, or signed consent forms are used, there is ALWAYS potential identifiability of data).

☒ Yes ☐ No If yes, complete item 17a

17a. State the type of identification, direct or indirect, on any specimens or data when they are made available to your study team: *The only potential identifier will be the participant's name and signature on the signed consent form. This form will only be used for internal purposes in support of the IRB process. Once the researcher has received the signed consent forms, they will be locked away in a file cabinet at the home of the researcher. All participants will be identified by pseudonyms only.*

Direct Identifiers include subject name, address, social security, etc.

Indirect Identifiers include any number that could be used by the investigator or the source providing the data/specimens to identify a subject, e.g., pathology tracking number, medical record number, sequential or random code number)

18. **Access to Data**: Specify faculty and staff (members of the study team) permitted to have access to the study data.

At present, only the researcher will have access to the data collected. It is possible that the researcher's dissertation chair, Dr. Andrea Ellinger, and methodologist, Dr. Rochell McWhorter, will have access to the data for analysis purposes. Both committee members have completed the IRB training and is familiar with the IRB process.

19. **Have all individuals who have access to data been educated about human subject ethics and confidentiality measures?** (NOTE: This is responsibility of PI)

☒ Yes ☐ No

20. **Protection of Data:** **State** how data will be protected, e.g., located filing cabinet in investigator's office, on password protected computer, location(s) of computer, etc.

The data will be stored on a computer that is password protected and encrypted and that is located in the researcher's home office. Also, any written data will be stored in a locked filing cabinet also located in the researcher's home office.

21. **If data is on a laptop, acknowledge that the laptop will never be in an insecure location where theft is possible (e.g., in a locked car)**

Data contained on the laptop will never be left in an insecure location.

SIGNATURE OF PRINCIPAL INVESTIGATOR: Signature indicates agreement by the PI to abide by UT Tyler IRB policies and procedures in the UT Tyler Handbook and the Federal Wide Assurance, to the obligations as stated in the "Responsibilities of the Principal Investigator" and to use universal precautions with potential exposure to specimens.

Darius Mason Chapman
3/24/2016

Principal Investigator Signature Date
Please print name or affix electronic signature.
Electronic submission of this
form by PI indicates signature

Categories for Expedited Research

The following describes research activities and categories for expedited reviews:

(A) Research activities that: (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the following categories, as authorized by 45 CFR 46.110 and 21 CFR 56.110. The activities listed should not be deemed to be of minimal risk simply because they are included on this list. Inclusion on this list merely means that the activity is eligible for review through the expedited review procedure when the specific circumstances of the proposed research involve no more than minimal risk to human subjects.

(B) The categories in this list apply regardless of the age of subjects, except as noted.

(C) The expedited review procedure may not be used where identification of the subjects and/or their responses would reasonably place them at risk of criminal or civil liability or be damaging to the subjects in terms of financial standing, employability, insurability, reputation, or be stigmatizing, unless reasonable and appropriate protections will be implemented so that risks related to invasion of privacy and breach of confidentiality are no greater than minimal.

(D) The expedited review procedure may not be used for classified research involving human subjects.

(E) The standard requirements for informed consent (or its waiver, alteration, or exception) apply regardless of the type of review--expedited or convened--utilized by the IRB.

(F) Categories one (1) through seven (7) pertain to both initial and continuing IRB review.

The following categories for Expedited Research is in compliance with 45 CFR 46.110 and 21 CFR 56.110 of the Federal Policy for the Protection of Human Subjects, located at:
http://www.hhs.gov/ohrp/humansubjects/guidance/expedited98.htm

RESEARCH CATEGORIES

CATEGORY #1 Clinical studies of drugs and medical devices only when condition (a) or (b) is met.

(a) Research on drugs for which an investigational new drug application (21 CFR Part 312) is not required. (Note: Research on marketed drugs that significantly increases the risks or decreases the acceptability of the risks associated with the use of the product is not eligible for expedited review.)

(b) Research on medical devices for which (i) an investigational device exemption application (21 CFR Part 812) is not required; or (ii) the medical device is cleared/approved for marketing and the medical device is being used in accordance with its cleared/approved labeling.

CATEGORY #2 **Collection of blood samples by finger stick, heel stick, ear stick, or venipuncture as follows**:

(a) from healthy, nonpregnant adults who weigh at least 110 pounds. For these subjects, the amounts drawn may not exceed 550 ml in an 8 week period and collection may not occur more frequently than 2 times per week; or

(b) from other adults and children [children are defined in the HHS regulations as "persons who have not attained the legal age for consent to treatments or procedures involved in the research, under the applicable law of the jurisdiction in which the research will be conducted." 45 CFR 46.402(a)]., considering the age, weight, and health of the subjects, the collection procedure, the amount of blood to be collected, and the frequency with which it will be collected. For these subjects, the amount drawn may not exceed the lesser of 50 ml or 3 ml per kg in an 8 week period and collection may not occur more frequently than 2 times per week.

CATEGORY #3 **Prospective collection of biological specimens for research purposes by noninvasive means.**

Examples: (a) hair and nail clippings in a nondisfiguring manner; (b) deciduous teeth at time of exfoliation or if routine patient care indicates a need for extraction; (c) permanent teeth if routine patient care indicates a need for extraction; (d) excreta and external secretions (including sweat); (e) uncannulated saliva collected either in an unstimulated fashion or stimulated by chewing gumbase or wax or by applying a dilute citric solution to the tongue; (f) placenta

removed at delivery; (g) amniotic fluid obtained at the time of rupture of the membrane prior to or during labor; (h) supra- and subgingival dental plaque and calculus, provided the collection procedure is not more invasive than routine prophylactic scaling of the teeth and the process is accomplished in accordance with accepted prophylactic techniques; (i) mucosal and skin cells collected by buccal scraping or swab, skin swab, or mouth washings; (j) sputum collected after saline mist nebulization.

CATEGORY #4 **Collection of data through noninvasive procedures (not involving general anesthesia or sedation) routinely employed in clinical practice, excluding procedures involving x-rays or microwaves.**

Where medical devices are employed, they must be cleared/approved for marketing. (Studies intended to evaluate the safety and effectiveness of the medical device are not generally eligible for expedited review, including studies of cleared medical devices for new indications.)

Examples: (a) physical sensors that are applied either to the surface of the body or at a distance and do not involve input of significant amounts of energy into the subject or an invasion of the subject's privacy; (b) weighing or testing sensory acuity; (c) magnetic resonance imaging; (d) electrocardiography, electroencephalography, thermography, detection of naturally occurring radioactivity, electroretinography, ultrasound, diagnostic infrared imaging, doppler blood flow, and echocardiography; (e) moderate exercise, muscular strength testing, body composition assessment, and flexibility testing where appropriate given the age, weight, and health of the individual.

CATEGORY #5 **Research involving materials (data, documents, records, or specimens) that have been collected, or will be collected solely for nonresearch purposes (such as medical treatment or diagnosis).**

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(4). This listing refers only to research that is not exempt.)

CATEGORY #6 **Collection of data from voice, video, digital, or image recordings made for research purposes**.

CATEGORY #7 **Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.**

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(2) and (b)(3). This listing refers only to research that is not exempt.)

CATEGORY #8 **Continuing review of research previously approved by the convened IRB as follows:**

(a) where (i) the research is permanently closed to the enrollment of new subjects; (ii) all subjects have completed all research-related interventions; and (iii) the research remains active only for long-term follow-up of subjects; or

(b) where no subjects have been enrolled and no additional risks have been identified; or

(c) where the remaining research activities are limited to data analysis.

CATEGORY #9 **Continuing review of research, not conducted under an investigational new drug application or investigational device exemption where categories two (2) through eight (8) do not apply but the IRB has determined and documented at a convened meeting that the research involves no greater than minimal risk and no additional risks have been identified**.

Appendix B: Informed Consent to Participate in Research Pilot Study

THE UNIVERSITY OF TEXAS AT TYLER

Informed Consent to Participate in Research
Institutional Review Board # Sp2016-90

Approval Date: March 29, 2016

1. **Project Title**: SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING ASSOCIATE PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIMS

2. **Principal Investigator:** Darius Mason Chapman

3. **Participant's Name:**

To the Participant:

You are being asked to take part in this study at The University of Texas at Tyler (UT Tyler). This permission form explains:

- Why this research study is being done.
- What you will be doing if you take part in the study.
- Any risks and benefits you can expect if you take part in this study.

After talking with the person who asks you to take part in the study, you should be able to:

- Understand what the study is about.
- Choose to take part in this study because you understand what will happen

4. Description of Project

As part of the fulfilling my dissertation research as the final requirement for obtaining my doctoral degree in Human Resource Development at The University of Texas at Tyler, I am interested in studying how pastors in the (denomination name) process their experiences both during and after serving as internal interims during the vacancy period of the senior pastor position.

5. Research Procedures

If you agree to be in this study, we will ask you to do the following things:

You will be asked to sign this consent form which will enable me to conduct an interview with you. After we initially connect by phone or email to schedule the interview at your convenience, the interview can be conducted in person or via video chat technology (such as Skype or Zoom).

The interview will be tape and or video recorded with your permission and then will be transcribed verbatim along with any observations and field notes taken during the interview. The interview will be approximately 45-60 minutes in length.

At most, there is the likelihood of three contact points (including the interview) as you may be asked to provide additional clarifications of content related to your interview. You will also be asked to review your transcript for comprehensiveness and clarity, or to engage in a form of member checking when, the data collected from all of the interviews conducted is analyzed.

Your name, organizational affiliation, and contact details will not appear in any articles, conference presentations, or other refereed scholarly forums. A pseudonym will be used and all data provided will be aggregated if disseminated in any public forums.

You will be asked to not identify anyone by name or other identifiable manner.

6. Side Effects/Risks

It is not anticipated that you will incur any side effects or risks associated with consenting to be interviewed. The insights that you provide will be aggregated with other interviews for data analysis purposes. Your data will be treated confidentially and a pseudonym will be used to mask your identity and no organizational affiliations will be disclosed.

7. Potential Benefits

I anticipate that the perspectives and insights obtained from the various interviews conducted will serve to add to the limited literature and knowledge base when it comes to the experiences of pastors that have served as internal interims within a (denomination name) congregation during a period of vacancy in the senior pastor position.

Understanding of Participants

8. I have been given a chance to ask any questions about this research study. The researcher has answered my questions.

9. If I sign this consent form I know it means that:

- I am taking part in this study because I want to. I chose to take part in this study after having been told about the study and how it will affect me.

- I know that I am free to not be in this study. If I choose to not take part in the study, then nothing will happen to me as a result of my choice.

- I know that I have been told that if I choose to be in the study, then I can stop at any time. I know that if I do stop being a part of the study, then nothing will happen to me.

- I will be told about any new information that may affect my wanting to continue to be part of this study.

- The study may be changed or stopped at any time by the researcher or by The University of Texas at Tyler.

- The researcher will get my written permission for any changes that may affect me.

10. I have been promised that that my name will not be in any reports about this study unless I give my permission.

11. I also understand that any information collected during this study may be shared <u>as long as no identifying information such as my name, address, or other contact information is provided</u>). This information can include health information. Information may be shared with:

- Organization giving money to be able to conduct this study
- Other researchers interested in putting together your information with information from other studies
- Information shared through presentations or publications

12. I understand The UT Tyler Institutional Review Board (the group that makes sure that research is done correctly and that procedures are in place to protect the safety of research participants) may look at the research documents. These documents may have information that identifies me on them. This is a part of their monitoring procedure. I also understand that my personal information will not be shared with anyone.

13. I have been told about any possible risks that can happen with my taking part in this research project.

14. I also understand that I will not be given money for any patents or discoveries that may result from my taking part in this research.

15. If I have any questions concerning my participation in this project, I will contact the principal researcher: *Darius Mason Chapman* at *586-925-9599* or email *bochapman@juno.com*.

16. If I have any questions concerning my rights as a research subject, I will contact Dr. Gloria Duke, Chair of the IRB, at (903) 566-7023, gduke@uttyler.edu,
or the University's Office of Sponsored Research:

The University of Texas at Tyler
c/o Office of Sponsored Research
3900 University Blvd
Tyler, TX 75799

I understand that I may contact Dr. Duke with questions about research-related injuries.

17. CONSENT/PERMISSION FOR PARTICIPATION IN THIS RESEARCH STUDY

I have read and understood what has been explained to me. I give my permission to take part in this study as it is explained to me. I give the study researcher permission to register me in this study. I have received a signed copy of this consent form.

_____ _____

Signature of Participant Date

_____ _____

Signature of Person Responsible (e.g., legal guardian) Relationship to Participant

_____

Witness to Signature

18. I have discussed this project with the participant, using language that is understandable and appropriate. I believe that I have fully informed this participant of the nature of this study and its possible benefits and risks. I believe the participant understood this explanation.

_____ _____

Researcher/Principal Investigator Date

Appendix C: The University of Texas at Tyler IRB Main Study Application

THE UNIVERSITY OF TEXAS AT TYLER
INSTITUTIONAL REVIEW BOARD

EXPEDITED and EXEMPT RESEARCH APPLICATION

IRB: SUM2016-111

Approved by: G Duke

Date: *May 20, 2016*

DATE: *May 20, 2016*

Principal Investigator	*Chapman* *Darius M.* (Last) (First) (MI)
PI Title and Credentials	☐Assistant Professor ☐Associate Professor ☐Professor ☒ Student ☐Other
Faculty Sponsor Name and Email if PI is Student	*Dr. Andrea D. Ellinger* *Andrea_Ellinger@uttyler.edu [Dissertation Chair] and Dr. Rochell McWhorter RMcWhorter@uttyler.edu [Committee Member and Methodologist]*
PI Phone PI Email	*586-925-9599* *bochapman@gmail.com or dchapman4@patriots.uttyler.edu*
Co-Investigator(s)	*Click here to enter text.*
Co-Investigator(s) Email and Telephone	*Click here to enter text.* *Click here to enter text.*
Secondary Contact Person in Absence of PI	*Click here to enter text.*
Secondary Contact Person's Telephone and Email	Phone: *Click here to enter text.* Email: *Click here to enter text.*
Title of Proposed Research	*SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIM*

Source of Funding	☐NIH ☐Local ☐ Industry ☐ Other Federal (Specify) ☐Other (Specify) *Click here to enter text.*

Attach (electronically) to gduke@uttyler.edu with this application, the following:

- Written consent form using the UT Tyler Consent Template unless a waiver of written informed consent is requested
- Signature page of Thesis or Dissertation Committee members showing proposal approval for graduate students
- Brief research proposal that outlines background and significance, research design, research questions/hypotheses, data collection instruments and related information, data collection procedures, data analysis procedures. **Most of this can be copied and pasted to relevant parts of the application but please keep Background & Significance brief for the application.**
- Human Subject Education Certification for PI, co-investigators, and research assistants participating in recruitment, data collection, data analysis, or, if they have any exposure to identifiable data (if training has not been completed at UT Tyler within a 3 year period of time)
- Tool/instrument/survey; if copyright or other issues prohibit electronic form, submit one hard copy

COMPLETE ALL ITEMS TO AVOID DELAY IN IRB APPROVAL

3. **Designate the category that qualifies this proposal for what you believe will be either exempt or expedited review** (see UT Tyler Exempt (page 8) and Expedited Categories (page 9) at the end of this application) and justify this designation by responding to the statements below each category

Category # *7*

Information Required for Justification (See specific information under each category)

This research study represents the main study that will be conducted in fulfillment of my doctoral degree requirements. The data gathered during this study will be obtained through the use of semi-structured interviews which will be audio and video (when available) recorded, transcribed verbatim, and analyzed with the permission of the study's participants. Participation in this study represents no more than minimal, if any risks.

4. For proposals involving Personal Health Information (PHI) data: If this is a retrospective chart review (Category 5) (health records research), or, data involves review of PHI, refer to the IRB's HIPAA policies and procedures in the IRB Handbook and complete any appropriate forms. All can be located on the UT Tyler IRB site: http://www.uttyler.edu/research/compliance/irb/

2a. Does this protocol include the use of PHI? ☐ Yes ☒ No

***NOTE**: If the protocol includes the use of PHI, refer to the IRB Handbook on HIPAA policies and relevant forms that must be completed before IRB approval can be obtained.*

3. **Purpose Of Study:** *The purpose of this study will be to explore how internal interims perceive and process their interim experiences both during and after serving in the capacity as internal interims.*

4. **Research Questions:** *The overarching research question guiding this study is: How do internal interims perceive and process their interim experiences both during and after serving in a transitional period within their respective organization?*

5. **Brief Background and Significance of Study** (include enough to indicate literature gaps and why it is important to do this study)**:**

This study is compelling, appropriate, and relevant to the field of Human Resource Development because the topic of succession planning, while considered critical, has been underdeveloped when considering research related to how internal interims make sense of their tenure as an interim once they have returned to their former position without having had the opportunity to obtain the interim position on a permanent basis. Literature has also shown that the individuals who fill these periods of vacancy are often overlooked and this is especially important when discussing how their time serving as an interim affects their personal understanding of their role as an employee within the organization for the longer term. This study will add to and extend the limited base of empirical literature on internal interims by exploring the impact that periods of transition have on those who fill these roles. In addition, this study will address several implications for practice in regards to the

unique setting that succession planning and internal interims face within the context of religious non-profit organizations, and specifically within a unique denomination, (specific Christian denomination). Non-profit organizations in general, and those in the religious sector typically experience many challenges with succession planning as they frequently have a smaller talent pool compared to for-profit organizations, struggle with the ability to cultivate future leaders, an impending leadership deficit, and their apparent lack of consistently developing successful succession plans. Therefore, findings from this study should provide insights about the experiences of internal interims and how such interims can be appointed for succession planning purposes and how efforts can be made to help such interims readjust to their original positions.

6. <u>Target Population To Be Studied</u>:

c. Ages: *The age range of participants for this study will be approximately 25-75 years of age. The participants will include pastors in (specific Christian denomination) who recently served as an internal interim within a congregation.*

d. Gender: *Only males will be included in this research.*

Explain below if either gender is to be purposely excluded.

Due to the bylaws of (specific Christian denomination), only males may be pastors thereby limiting this research to only men.

c. Are all racial and ethnic groups included in general recruitment? ☐ Yes ☒ No

Explain below if a racial or ethnic group is to be purposely excluded.

It is possible that some racial or ethnic groups may not be

represented in this study due to the existing composition of pastors within (specific Christian denomination). It is not the intent of this researcher to exclude any racial or ethnic group but the researcher recognizes that the composition of the sample will largely be contingent upon the racial and ethnic composition of the existing pastors who meet the criteria for participating in this study, and who ultimately agree to be interviewed as part of the research process.

d. Number of Anticipated Subjects: *A minimum of 10 pastors who previously served as internal interims will be solicited for this study.*

e. Inclusion Criteria for Sample Eligibility: *This study will use a purposeful criterion based sampling strategy. All participants must be pastors within (specific Christian denomination) and they must have previously served as internal interims in a congregation for which they were affiliated. In their respective congregations, a vacancy for a senior pastor became available and the associate pastors were asked to serve in the capacity of an interim for the senior pastor position. The pastors selected for participation in this study must meet these stated criteria as well as represent congregations from different geographical locations across the United States. Further, a maximum timeframe of 5-8 years from the time the associate pastor served in the interim capacity and then*

transitioned into his former position will be required thereby

allowing ample time to process the interim experience.

Note: *Any study involving* ***prisoners*** *requires a full board review, and may not be approved under expedited review.*

7. Explain the locations or settings for sample recruitment and data collection:

a. In what settings (e.g., specific classroom, organizational meetings, church, clinics, etc.) will you do sample recruitment?

The recruitment of all participants for this study will be from (specific Christian denomination) congregations located throughout the United States. These potential participants will be identified by the researcher using three specific approaches: The researcher will contact the district presidents of the (identifying number) districts that comprise the (specific Christian denomination) to obtain the names and email contact details for pastors meeting the criteria for the study; 2, The researcher will, contact (identifying title) who work in (specific Christian denomination) congregations throughout the United Sates to obtain the names and email contact details for pastors meeting the criteria for the study; and, 3. The researcher will use a snowball sampling strategy to obtain the names of potential pastors who may meet the criteria for the study through those participants that have agreed to participate. These three approaches for identifying potential study participants will be used due to the fact that each of these groups have knowledge of individuals who would meet the requirements for participating in this research. From those names gathered, the pastors will be contacted by the researcher via email with regard to the purpose of the study.

b. In what settings will you collect your data?

Based on availability and the willingness to participate in the study, a minimum of 10 individuals will be interviewed for this study. The interviews will be tape and/or video (when available) recorded and transcribed verbatim with the participant's permission. Field notes and observations will also be used, and coupled with the interview transcripts,

will comprise the dataset for this research project. All videotaped interviews will only be used to capture observations and field notes and no visuals or any identifying information from the videos will be used. The researcher will schedule the interviews with the participants to occur at their convenience. Ideally the interviews will be personal-face-to-face interviews. However, given the potential geographical distribution of the participants, the use of technology-mediated approaches for conducting the interviews may be necessary. Such potential technology mediated approaches could include: video chat programs such as Skype, Zoom, or GoToMeeting where both the interviewer and interviewee and can see and hear each other and where recording the interview is possible.

8. <u>Prior to sample recruitment and data collection, who will you first obtain permission to do the recruitment and data collections:</u>

The researcher will personally obtain permission from those pastors who elect to participate in the study. These eligible pastors will have been previously identified by the (identifying number) District Presidents that comprise the (specific Christian denomination), or by (identifying title) within the (specific Christian denomination), or through snowball sampling of research participants given that each of these groups have knowledge of those pastors who have served as internal interims during the vacancy of a senior pastor position.

9. <u>Who will be recruiting the sample (humans, records, etc.)?</u>

The researcher will personally be contacting the pastors who meet the criteria of the research via email. All individuals who consent to being interviewed will be pastors within the (specific Christian denomination) and will have previously served as an internal interim in one of the (specific Christian denomination) congregations.

10. <u>How will recruitment be done?</u>

The potential participants that have been identified through the contacting of the (identifying number) district presidents of the (specific Christian denomination), (identifying title) serving within the (specific Christian denomination), and using snowball sampling of

participants that have agreed to participate, will be contacted by the researcher via email with regard to the purpose of the study.

a. **<u>Copy and paste text, verbal scripts, graphics, pictures, etc. below from any flyers, ads, letters etc. that are used for recruitment of participants</u>. NOTE: This is never an "N/A" option.** You may also add these as separate attachments and indicate so in space below.

The following information will appear in an email that will be sent to prospective pastors who meet the criteria for the research. Dear _____: My name is Darius Chapman and I am a doctoral candidate in the Department of Human Resource Development in the College of Business and Technology at The University of Texas at Tyler. I am currently conducting research to fulfill the requirements for my doctoral degree. The focus of my research explores how pastors in (specific Christian denomination) process their experiences both during and after serving as an internal interim when the senior pastor position became vacant and the associate pastor took over the responsibilities of this position during the transitional period. I would like to conduct a personal interview with you to obtain a fuller understanding of your interim experiences and how you processed these experiences during your time serving in this capacity and afterwards once you returned to your former role and responsibilities within the organization. The interview is expected to be approximately 60 to 75 minutes in length and will be conducted via a video chat program (such as Skype or Zoom) or via a personal, face-to-face

interview. I will have a prepared list of questions relating to the topics previously mentioned and will seek your perspectives about them. I will take notes during the interview process and will seek your permission to record the interview as appropriate and necessary. Collection of your data in this manner will enable me to engage in the interview process as well as to qualitatively analyze the data following the interview. The recorded interview will be kept on a password protected and encrypted computer and any paper copies of materials will be kept securely in a locked file cabinet and will be accessible only to myself, my dissertation chair and methodologist. My dissertation committee is being chaired by and overseen by Dr. Andrea D. Ellinger, Professor in the Department of Human Resource Development at The University of Texas at Tyler and Dr. Rochell McWhorter, also a faculty member at the University who is serving as my methodologist. Your participation in this research endeavor is completely voluntary, and you are free to withdraw at any time and for any reason without penalty. Your choice to participate or not participate will not impact your role or status at your organizational setting. You are also free to refuse to answer any questions you do not wish to answer. If you have any questions about this research project, please contact either myself, Darius "Bo" Chapman, at 586-925-955 or by email at bochapman@gmail.com, Dr. Andrea D. Ellinger at 903-566-7260 or by email Andrea_Ellinger@uttyler.edu, or Dr. Gloria Duke, Chair, Institutional

Review Board Committee, The University of Texas at Tyler by email

Gloria_Duke@uttyler.edu .

11. Informed Consent

. **Prospective research ordinarily requires written informed consent. Inclusion of children (under 18 years) requires permission of at least one parent AND the assent of the child (refer to UT Tyler's Policy on Informed Consent of Children)**.

If written consent is to be used, terminology must be about the 8th grade level, or as appropriate for the accurate understanding of the participant or guardian.

If there are questions about the literacy or cognitive level of potential participants, there must be evidence that the participant is able to verbalize basic information about the research, their role, time commitment, risks, and the voluntary nature of participating and/or ceasing participation with no adverse consequences.

Please use the templates posted under the IRB forms as a guide, and attach as a separate document with the application submission.

Do not copy and paste from this document into consent form. Use simple and easy to understand terminology

12. This section ONLY for those requesting a waiver or alteration of SIGNED and written informed consent:

Justify the waiver or alteration in accordance with the following four criteria established under 45CFR46.116(d)(1-4).

All four criteria must be met in order to have signed written informed consents. In other words, you must answer "yes" to all four of the criteria below in order to NOT have written and signed informed consents.

If you are requesting a waiver of written and signed informed consent, Indicate "yes" if the statement is true about your proposed research:

2. The research involves no more than minimal risk to the subjects ☐ Yes ☐ No

2. The waiver or alteration will not adversely affect the rights and welfare of the subjects
☐ Yes ☐ No

3. The research could not practicably be carried out without the waiver or alteration,
☐ Yes ☐ No **AND**

4. Whenever appropriate, the subjects will be provided with additional pertinent information after participation ☐ Yes ☐ No.

13. When prospective informed consent is waived, explain how you will obtain permission to use participant's data. If no permission is planned, please explain your rationale.

Click here to enter text.

14. Detailed Data Collection Procedures ATTENTION: Be very specific for this item.

Specify **who, what, when, where, how,** duration type of information for your procedures.
Write this section as if you were giving instructions to another person not familiar with your study.

The individuals who agree to participate in this interview process may be interviewed in person or via video chat technology (such as Skype or Zoom). Initial contact will be made by the researcher, as well as, all arrangements for the scheduling of the interviews. The interviews will be approximately 60-75 minutes in length, and with the participant's permission, will be tape and/or video recorded with field notes and observations being documented as well. It is anticipated that one interview appointment will be necessary but should not exceed three points of contact. It is possible that the researcher may need to obtain clarification of data contained in the interview transcript, which may require additional email or personal exchange. The participants will also be asked to review

their transcripts and to examine preliminary findings as a form of member checking. The data gathered, once analyzed and thematically aggregated, will be utilized in the researcher's dissertation, as well as, disseminated at conferences or in scholarly refereed publications. It is anticipated that 2 – 4 years will be sufficient to analyze the data, as well as, develop scholarly deliverables that can be disseminated about the findings from this research. Participants will not be identified by name, congregation, or in any other manner. Participants will also be asked not to identify anyone by name or other manner that could be identifiable. For the interview, the following semi-structured interview protocol will be utilized:

1. Can you begin by telling me a little about yourself and your history serving within (specific Christian denomination)? In other words, please provide me with a progression of your career from your initial introduction to the church to the present day.

2. How long have you been working at your current congregation?

3. Is this the congregation in which you served as the internal interim during the vacancy of the senior pastor position? Can you tell me about the congregation?

4. Were there any unique situations leading up to the vacancy of the senior pastor position? Why did the senior pastor depart the congregation?

5. How were you asked/approached to fill the role and responsibilities of the vacated senior pastor position and were there any written or oral directions from your supervisors in regards to how long you would be in the position, what were your primary duties, and so forth?

6. At any time did your supervisors address with you the opportunity that you may or may not be called to the senior pastor position permanently? Why were you willing to step into the capacity of the interim knowing that you might or might not be called to the senior pastor position? Did you want to be considered for the senior pastor position?

7. Tell me about you interim experience. What did you do? What major challenges and/or opportunities did you encounter? Can you describe what the congregation was like before you filled the role and responsibilities of the senior pastor position and what it was like during your tenure as interim? How did your co-workers, supervisors, and congregation treat you during your interim role? What do you feel you accomplished? What do you feel that you learned or benefited from serving in this capacity?

8. When your interim appointment was concluded, how did it feel to return to your former position after the congregation had called someone else for the senior pastor position?

9. How did your co-workers and supervisors treat you upon your return to your former position? How did you get treated by the congregation?

10. In what way, if any, did your experiences both during and after your time as an internal interim effect your perception of yourself and your role within the organization upon your return to your former position? How did serving in this capacity help or hinder your career succession in the organization? How has it influenced where you are currently positioned?

11. Is there anything that your former senior pastor could have done to prepare you for the role and responsibilities you would undertake during the transitional period?

12. Given what you know now from your interim experience, if you had the opportunity to go back in time, would you take on that role again? What about in the future if an interim opportunity exists in a congregation that you are serving?

13. As we bring the interview to closure and you reflect on your interim experience, what lessons did you learn? Did you, and if yes, how did you grow from this experience? If you had to provide any advice to others being asked to serve in the interim role, what would it be? If you could influence any changes in the interim process, what would they be and what could be done differently?

15. Data Analysis Procedures:

The primary concern of qualitative data analysis is focused on the specific codes, themes, and patterns appearing in the data (Miles & Huberman, 1994). Therefore, each of the interviews will be tape and or video recorded and transcribed verbatim. To maintain a higher level of rigor and robustness, the transcription of each of the interviews will occur within a relatively short time following the interview. In addition, field notes and observations will be taken by the researcher during the interview. Interpretative Phenomenological Analysis (IPA) will be used as the approach for data analysis. The process of IPA is to analyze data on a case by case basis and then later make comparison across all of the cases.

16. Risks and benefits of this research to the subjects and/or society

Risks: *It is not anticipated that participants will incur any side effects or risks associated with this research. The data will be treated confidentially and a pseudonym will be used to mask all identities. No institutional or organizational affiliations will be disclosed. Participants will be asked to never identify another person by name or other way that could be identified. No specific religious organization will be named in any*

reports or presentations, nor any identifiable reference to such organization such as the name of a congregation or the location of that congregation.

Benefits: *The researcher anticipates that the insights collected from the interviews will be of interest to the pastors participating in the study, along with the leadership of the congregations, as it is anticipated that the processing the experiences of serving as internal interims can help promote understanding of serving in this capacity along with any adjustments that need to be considered when the interims return to their original positions within the congregation. In addition, the findings of this study will add to the existing sparse literature base on internal interims. In terms of societal benefits, this study will also add to and extend insights about such interim roles within the under-studied religious non-profit sector, and specifically the (specific Christian denomination) which may offer insights that can positively influence succession planning processes within this sector and denomination.*

17. Identifiability of data or specimens: Will the specimens or data be identifiable?

(NOTE: Any time code numbers are used, or signed consent forms are used, there is ALWAYS potential identifiability of data).

☒ Yes ☐ No If yes, complete item 17a

17a. State the type of identification, direct or indirect, on any specimens or data when they are made available to your study team: *The only potential identifier will be the participant's name and signature on the signed consent form. This form will only be used for internal purposes in support of the IRB process. Once the researcher has received the signed consent forms, they will be locked away in a file cabinet at the home of the researcher. All participants will be identified by pseudonyms only.*

Direct Identifiers include subject name, address, social security, etc.

Indirect Identifiers include any number that could be used by the investigator or the source providing the data/specimens to identify a

subject, e.g., pathology tracking number, medical record number, sequential or random code number)

18. **Confidentiality and Protection of Data:** Specify how confidentiality will be secured and maintained for research data

For example, locked in file cabinet in office; on password protected computer, location(s) of computer; identifers and signed consent forms are kept locked in separate entity from data, etc.).

Individuals who consent to be interviewed will be assigned pseudonyms and their identities will be completely masked in terms of their names and organizational affiliations. All recordings, subsequent transcriptions, field notes, and any other respective data will be secured on a password protected and encrypted computer and any paper copies of materials will be secured in a locked file cabinet to which only the researcher has access to. No voice, photos, video recordings will be used in presentations, publications or other public disseminations.

19. **Access to Data**: Specify faculty and staff (members of the study team) permitted to have access to the study data.

At present, only the researcher will have access to the data collected. It is possible that the researcher's dissertation chair, Dr. Andrea D. Ellinger, and methodologist, Dr. Rochell McWhorter, will have access to the data for analysis purposes. Both committee members have completed the IRB training and are familiar with the IRB process.

20. **Have all individuals who have access to data been educated about human subject ethics and confidentiality measures?** (NOTE: This is responsibility of PI)

☒ Yes ☐ No

21. **If data is on a laptop, acknowledge that the laptop will never be in an insecure location where theft is possible (e.g., in a locked car)**

Data contained on the laptop will never be left in an insecure location.

SIGNATURE OF PRINCIPAL INVESTIGATOR: Signature indicates agreement by the PI to abide by UT Tyler IRB policies and procedures in the UT Tyler Handbook and the Federal Wide Assurance, to the obligations as stated in the "Responsibilities of the Principal Investigator" and to use universal precautions with potential exposure to specimens.

Darius M. Chapman *May 20, 2016*

Principal Investigator Signature Date
Please print name or affix electronic signature.
Electronic submission of this
form by PI indicates signature

Categories for Exempt Research

The following categories for Exempt Research is in compliance with Subpart **46.101(b)** of the Federal Policy for the Protection of Human Subjects, located at: http://www.med.umich.edu/irbmed/FederalDocuments/hhs/HHS45CFR46.html#46.101

1. Research conducted in established or commonly accepted educational settings, involving normal educational practices, such as (i) research on regular and special education instructional strategies, or (ii) research on the effectiveness of or the comparison among instructional techniques, curricula, or classroom management methods.

2. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless: (i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and (ii) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.

3. Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures, or observation of public behavior that is not exempt under paragraph (2) if (i) the human subjects are elected or

appointed public officials or candidates for public office; or (ii) federal statute(s) without exception that the confidentiality of the personally identifiable information will be maintained throughout the research and thereafter.

4. Research involving the collection or study of existing data, documents, records, pathological specimens, or diagnostic specimens, if these sources are publicly available or if the information is recorded by the investigator in such a manner that subjects cannot be identified, directly or through identifiers linked to the subjects.

5. Research and demonstration projects which are conducted by or subject to the approval of Department or Agency heads, and which are designed to study, evaluate, or otherwise examine: (i) public benefit or service programs, (ii) procedures for obtaining benefits or services under those programs, (iii) possible changes in or alternatives to those programs or procedures, or (iv) possible changes in methods or levels of payment for benefits or services under those programs.

6. Taste and food quality evaluation and consumer acceptance studies, (i) if wholesome foods without additives are consumed or (ii) if a food is consumed that contains a food ingredient at or below the level and for a use found to be safe, or agricultural chemical or environmental contaminant at or below the level found to be safe, by the Food and Drug Administration or approved by the Environmental Protection Agency or the Food Safety and Inspection Service of the U.S. Department of Agriculture.

Categories for Expedited Research

The following describes research activities and categories for expedited reviews:

(A) Research activities that: (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the following categories, as authorized by 45 CFR 46.110 and 21 CFR 56.110. The activities listed should not be deemed to be of minimal risk simply because they are included on this list. Inclusion on this list merely means that the activity is eligible for review through the expedited review procedure when the specific

circumstances of the proposed research involve no more than minimal risk to human subjects.

(B) The categories in this list apply regardless of the age of subjects, except as noted.

(C) The expedited review procedure may not be used where identification of the subjects and/or their responses would reasonably place them at risk of criminal or civil liability or be damaging to the subjects in terms of financial standing, employability, insurability, reputation, or be stigmatizing, unless reasonable and appropriate protections will be implemented so that risks related to invasion of privacy and breach of confidentiality are no greater than minimal.

(D) The expedited review procedure may not be used for classified research involving human subjects.

(E) The standard requirements for informed consent (or its waiver, alteration, or exception) apply regardless of the type of review--expedited or convened--utilized by the IRB.

(F) Categories one (1) through seven (7) pertain to both initial and continuing IRB review.

The following categories for Expedited Research is in compliance with 45 CFR 46.110 and 21 CFR 56.110 of the Federal Policy for the Protection of Human Subjects, located at:
http://www.hhs.gov/ohrp/humansubjects/guidance/expedited98.htm

RESEARCH CATEGORIES

CATEGORY #1 Clinical studies of drugs and medical devices only when condition (a) or (b) is met.

(a) Research on drugs for which an investigational new drug application (21 CFR Part 312) is not required. (Note: Research on marketed drugs that significantly increases the risks or decreases the acceptability of the risks associated with the use of the product is not eligible for expedited review.)

(b) Research on medical devices for which (i) an investigational device exemption application (21 CFR Part 812) is not required; or (ii) the medical device is

cleared/approved for marketing and the medical device is being used in accordance with its cleared/approved labeling.

CATEGORY #2 Collection of blood samples by finger stick, heel stick, ear stick, or venipuncture as follows:

(a) from healthy, nonpregnant adults who weigh at least 110 pounds. For these subjects, the amounts drawn may not exceed 550 ml in an 8 week period and collection may not occur more frequently than 2 times per week; or

(b) from other adults and children [children are defined in the HHS regulations as "persons who have not attained the legal age for consent to treatments or procedures involved in the research, under the applicable law of the jurisdiction in which the research will be conducted." 45 CFR 46.402(a)]., considering the age, weight, and health of the subjects, the collection procedure, the amount of blood to be collected, and the frequency with which it will be collected. For these subjects, the amount drawn may not exceed the lesser of 50 ml or 3 ml per kg in an 8 week period and collection may not occur more frequently than 2 times per week.

CATEGORY #3 Prospective collection of biological specimens for research purposes by noninvasive means.

Examples: (a) hair and nail clippings in a nondisfiguring manner; (b) deciduous teeth at time of exfoliation or if routine patient care indicates a need for extraction; (c) permanent teeth if routine patient care indicates a need for extraction; (d) excreta and external secretions (including sweat); (e) uncannulated saliva collected either in an unstimulated fashion or stimulated by chewing gumbase or wax or by applying a dilute citric solution to the tongue; (f) placenta removed at delivery; (g) amniotic fluid obtained at the time of rupture of the membrane prior to or during labor; (h) supra- and subgingival dental plaque and calculus, provided the collection procedure is not more invasive than routine prophylactic scaling of the teeth and the process is accomplished in accordance with accepted prophylactic techniques; (i) mucosal and skin cells collected by buccal scraping or swab, skin swab, or mouth washings; (j) sputum collected after saline mist nebulization.

CATEGORY #4 **Collection of data through noninvasive procedures (not involving general anesthesia or sedation) routinely employed in clinical practice, excluding procedures involving x-rays or microwaves.**

Where medical devices are employed, they must be cleared/approved for marketing. (Studies intended to evaluate the safety and effectiveness of the medical device are not generally eligible for expedited review, including studies of cleared medical devices for new indications.)

Examples: (a) physical sensors that are applied either to the surface of the body or at a distance and do not involve input of significant amounts of energy into the subject or an invasion of the subject's privacy; (b) weighing or testing sensory acuity; (c) magnetic resonance imaging; (d) electrocardiography, electroencephalography, thermography, detection of naturally occurring radioactivity, electroretinography, ultrasound, diagnostic infrared imaging, doppler blood flow, and echocardiography; (e) moderate exercise, muscular strength testing, body composition assessment, and flexibility testing where appropriate given the age, weight, and health of the individual.

CATEGORY #5 **Research involving materials (data, documents, records, or specimens) that have been collected, or will be collected solely for nonresearch purposes (such as medical treatment or diagnosis).**

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45 CFR 46.101(b)(4). This listing refers only to research that is not exempt.)

CATEGORY #6 **Collection of data from voice, video, digital, or image recordings made for research purposes**.

CATEGORY #7 **Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.**

(NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. 45

CFR 46.101(b)(2) and (b)(3). This listing refers only to research that is not exempt.)

CATEGORY #8 Continuing review of research previously approved by the convened IRB as follows:

(a) where (i) the research is permanently closed to the enrollment of new subjects; (ii) all subjects have completed all research-related interventions; and (iii) the research remains active only for long-term follow-up of subjects; or

(b) where no subjects have been enrolled and no additional risks have been identified; or

(c) where the remaining research activities are limited to data analysis.

CATEGORY #9 Continuing review of research, not conducted under an investigational new drug application or investigational device exemption where categories two (2) through eight (8) do not apply but the IRB has determined and documented at a convened meeting that the research involves no greater than minimal risk and no additional risks have been identified.

Appendix D: Informed Consent to Participate in Research Main Study

THE UNIVERSITY OF TEXAS AT TYLER
Informed Consent to Participate in Research

Institutional Review Board # SUM2016-111
Approval Date: May 20, 2016

1. Project Title: SUCCESSION PLANNING IN THE RELIGIOUS NON-PROFIT SECTOR: UNDERSTANDING ASSOCIATE PASTORS' EXPERIENCES OF SERVING AS INTERNAL INTERIMS

2. Principal Investigator: Darius Mason Chapman

3. Participant's Name:

To the Participant:

You are being asked to take part in this study at The University of Texas at Tyler (UT Tyler). This permission form explains:

- Why this research study is being done.
- What you will be doing if you take part in the study.
- Any risks and benefits you can expect if you take part in this study.

After talking with the person who asks you to take part in the study, you should be able to:

- Understand what the study is about.
- Choose to take part in this study because you understand what will happen

4. Description of Project

As part of fulfilling the final requirements for obtaining my doctoral degree in Human Resource Development at The University of Texas at Tyler, I am interested in studying how pastors in (specific Christian denomination) process their experiences of having served as internal interims during the vacancy period of the senior pastor position. I am interested in learning more about the interim experiences during and following the interim role.

5. Research Procedures

If you agree to be in this study, we will ask you to do the following things:
You will be asked to sign this consent form which will enable me to conduct a personal, semi-structured interview with you. After we initially connect by phone or email to schedule the interview at your convenience, the interview can be conducted at your convenience in person or via video chat technology (such as Skype or Zoom). The interview will be tape and or video recorded with your permission and then will be transcribed verbatim along with any observations and

field notes taken during the interview. The interview will be approximately 60-75 minutes in length. At most, there is the likelihood of three contact points (including the interview) as you may be asked to provide additional clarifications of content related to your interview. You will also be asked to review your transcript for comprehensiveness and clarity, or to engage in a form of member checking when the data collected from all of the interviews conducted is analyzed. Your name, organizational affiliation, and contact details will not appear in any articles, conference presentations, or other refereed scholarly forums. A pseudonym will be used and all data provided will be aggregated if disseminated in any public forums.

6. Side Effects/Risks

It is not anticipated that you will incur any side effects or risks associated with consenting to be interviewed. The insights that you provide will be aggregated with other interviews for data analysis purposes. Your data will be treated confidentially and a pseudonym will be used to mask your identity and no organizational affiliations will be disclosed.

7. Potential Benefits

I anticipate that the perspectives and insights obtained from the various interviews conducted will serve to add to the limited literature and knowledge base when it comes to understanding the experiences of pastors that have served as internal interims within a (specific Christian denomination) congregation during a period of vacancy in the senior pastor position. I anticipate that, as a participant, you may enjoy reflecting on your experiences and sharing them with me. I also anticipate that insights gleaned from the interviews may benefit not only the scholarly research on this topic which is relatively limited for non-profits and religious organizations, but may also benefit society, by influencing the succession planning process based upon the collective experiences of study participants.
Understanding of Participants

8. I have been given a chance to ask any questions about this research study. The researcher has answered my questions.

9. If I sign this consent form I know it means that:

- I am taking part in this study because I want to. I chose to take part in this study after having been told about the study and how it will affect me.

- I know that I am free to not be in this study. If I choose to not take part in the study, then nothing will happen to me as a result of my choice.

- I know that I have been told that if I choose to be in the study, then I can stop at any time. I know that if I do stop being a part of the study, then nothing will happen to me.

- I will be told about any new information that may affect my wanting to continue to be part of this study.

- The study may be changed or stopped at any time by the researcher or by The University of Texas at Tyler.

- The researcher will get my written permission for any changes that may affect me.

10. I have been promised that that my name will not be in any reports about this study unless I give my permission.

11. I also understand that any information collected during this study may be shared as long as no identifying information such as my name, address, or other contact information is provided). This information can include health information. Information may be shared with:

- Organization giving money to be able to conduct this study
- Other researchers interested in putting together your information with information from other studies
- Information shared through presentations or publications

12. I understand The UT Tyler Institutional Review Board (the group that makes sure that research is done correctly and that procedures are in place to protect the safety of research participants) may look at the research documents. These documents may have information that identifies me on them. This is a part of their monitoring procedure. I also understand that my personal information will not be shared with anyone.

13. I have been told about any possible risks that can happen with my taking part in this research project.

14. I also understand that I will not be given money for any patents or discoveries that may result from my taking part in this research.

15. If I have any questions concerning my participation in this project, I will contact the principal researcher: Darius Mason Chapman at 586-925-9599 or email bochapman@juno.com.

16. If I have any questions concerning my rights as a research subject, I will contact Dr. Gloria Duke, Chair of the IRB, at (903) 566-7023, gduke@uttyler.edu, or the University's Office of Sponsored Research:

The University of Texas at Tyler
c/o Office of Sponsored Research
3900 University Blvd
Tyler, TX 75799

I understand that I may contact Dr. Duke with questions about research-related injuries.

17. CONSENT/PERMISSION FOR PARTICIPATION IN THIS RESEARCH STUDY

I have read and understood what has been explained to me. I give my permission to take part in this study as it is explained to me. I give the study researcher permission to register me in this study. I have received a signed copy of this consent form.

_____ _ ___ _ _____ _____
Signature of Participant Date

_____ _____ _____
_____
Signature of Person Responsible (e.g., legal guardian)
Relationship to Participant

_____
Witness to Signature

18. I have discussed this project with the participant, using language that is understandable and appropriate. I believe that I have fully informed this participant of the nature of this study and its possible benefits and risks. I believe the participant understood this explanation.

_____ _____
Researcher/Principal Investigator Date

Biographical Sketch

Darius "Bo" Chapman has been working in ministry for close to two decades. His primary focus has been investing in the personal and spiritual lives of teenagers and young adults, as well as, their parents with the goal of strengthening and encouraging individuals and their families as a whole. He has also served as a speaker, writer, planner, and facilitator for his denomination at the regional, district, and denomination-wide level.

Darius earned his Bachelor of Business Management (1994) and MBA (1996) from the University of Texas at Tyler. He also received his certification as a Director of Christian Education in 2004. Darius began his Ph.D. studies in 2011 at the University of Texas at Tyler as a member of the inaugural doctoral cohort in the Ph.D. in Human Resource Development program. Darius interests center on various practices that bring the best of the religious sector into the business world and the best of the business world in the religious sector.