

A young man with short brown hair and a light beard is smiling and looking out a window. He is wearing a blue denim button-down shirt. The background shows a bright window with a view of a city and some indoor plants. The overall tone is positive and professional.

THE PASTORAL SUCCESSION TOOLKIT

**A Guide to a Smooth
Pastoral Transition**

Pre-Transition

Discerning & Deciding Your Call to Become a Lead Pastor

The weight of leading a church is far too heavy for this to be about a job and decision. This must be about an obedience to a calling. To discern and decide that calling, you'll need council.

“Do I have wise counsel surrounding me in this decision?”

- Prayer
- Spouse and family
- Trusted mentors
- Insiders at the church (if you can share it with them)

“Do I have the right motives?”

- I have energy and enthusiasm for the future and what's to come.
- I'm free from my own ambitions (the decision is about passion, not employment).
- This fits my gifting and others who are honest with me affirm this.
- I'm running to something good, not running away from something.
- If it meant a pay decrease, I would still do this.

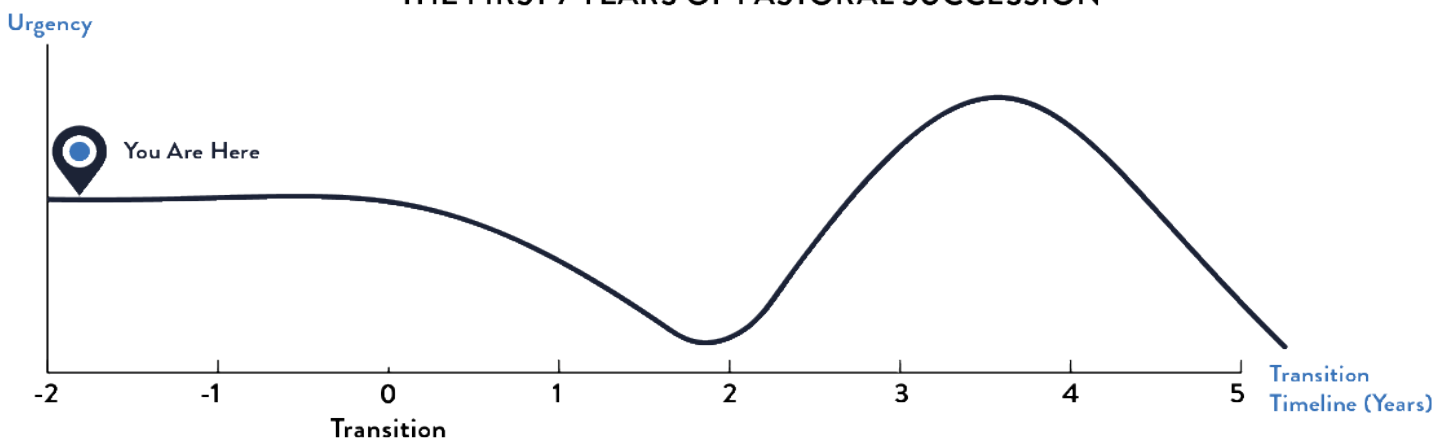
Assessing Yourself & the Church

For a transition to go well, both the leader and the church need to take essential steps to prepare in advance. In addition to preparation, there has to be alignment in key areas for the church to be in a healthier place post-transition.

“Am I ready to step into the role of Lead Pastor?”

- If I left my current position, I'd be welcomed back with open arms.
- Past experiences as a leader have gone well for me and the people who have followed me in the past would want to continue following me in the future.
- I'm saying 'yes' to God and not proving something to myself or someone else .

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Pre-Transition

Assessing Yourself & the Church (Continued)

“Is the church ready for me to step in as Lead Pastor?”

We are in alignment in key areas:

Theologically

Missionally

- I’m on board with the missional direction of the church (changes are okay, but I do not want to change the entire direction).
- I’ve evaluated how the church routinely takes risks to do new things and am comfortable with that level.
- The demographics of the staff and key volunteers reflects the surrounding community.

Culturally

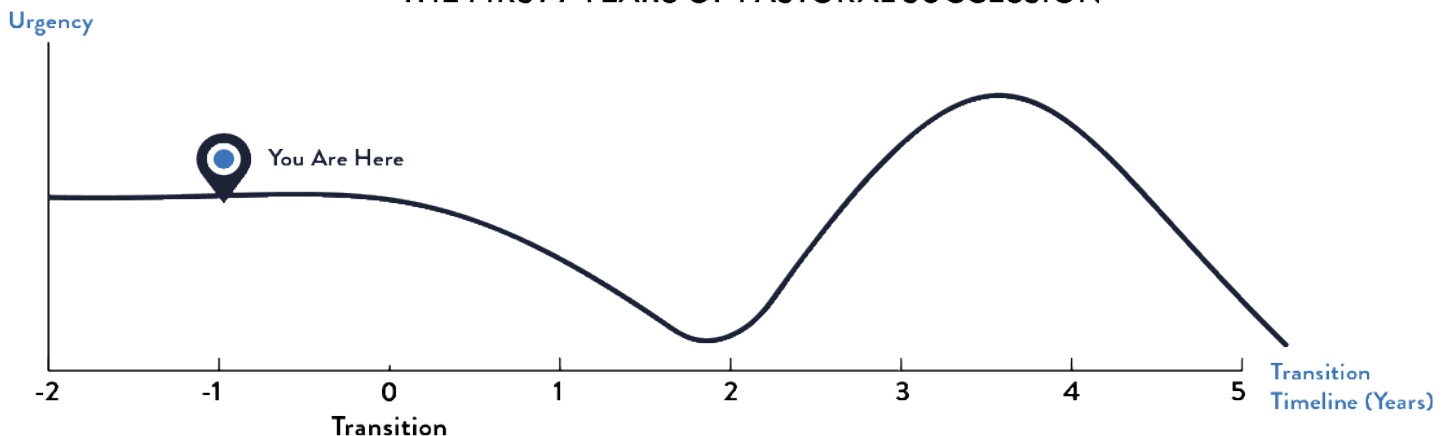
- I’ve considered how much of the existing culture embodies me.
- I’ve evaluated how much of it I would need to change over time (and how fast).

Financially

- I have a clear picture of the church’s budget size.
- I know what % of the operational budget is dedicated to staff and understand why staffing falls in that range:
 - 60%+ (High)
 - 50-60% (Normal)
 - 40-50% (Excellent)
- I know how much debt the church has.
- Total debt payments are less than 20% of the budget.

For more evaluation tools check out the [Mission Execution Matrix](#) inside [The Art of Pastoral Succession](#) course

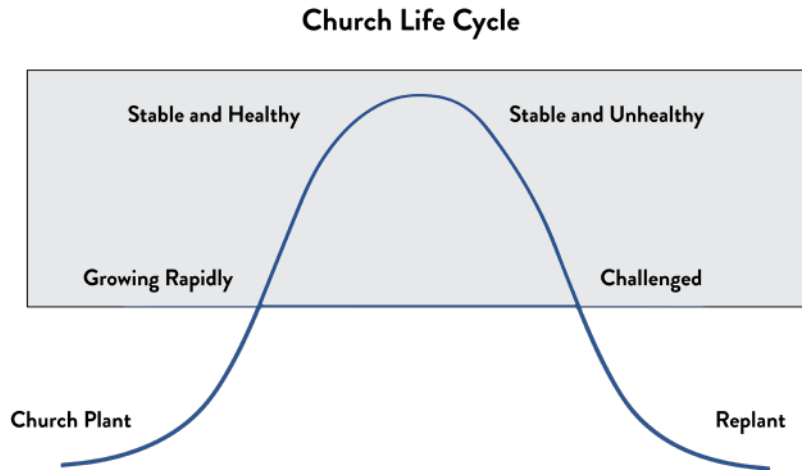
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Pre-Transition

Assessing Yourself & the Church (Continued)

We are in agreement on where the church is in its lifecycle.

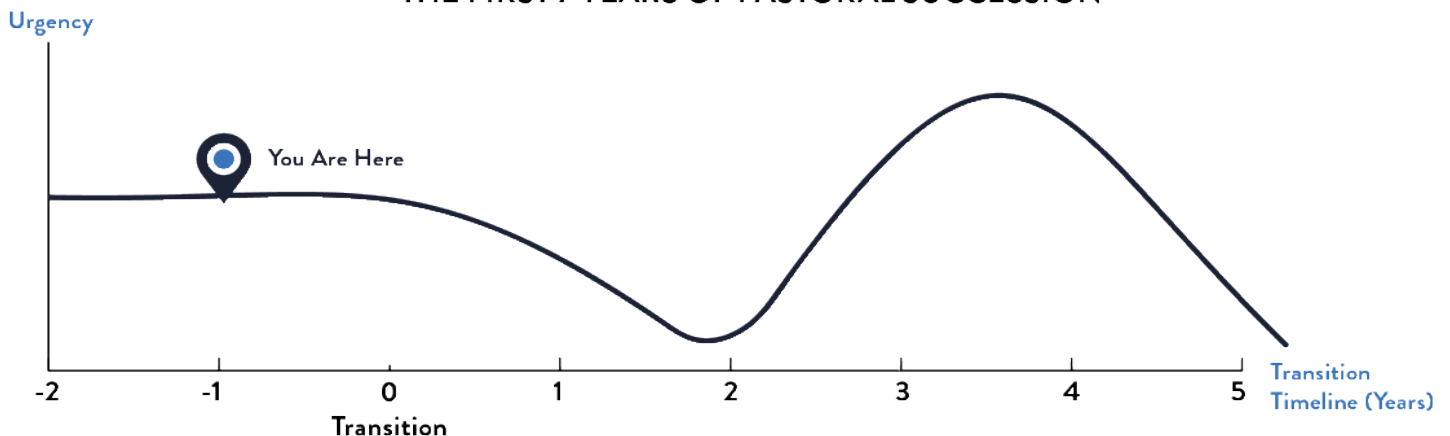


- I've asked the church the following questions:
- What do you love about this church?
 - What is unique for this church within our city?
 - How would you love to see this church grow?
 - What advice do you have for me?
 - What do you know now that would take me a year to learn?

“Have I evaluated the board of elders?”

- I've met and evaluated the board of elders.
- It's comprised of Godly and healthy leaders.
 - They have term limits.
 - There is a clear process for adding and removing elders.
 - There is a clear process for training and onboarding new elders.
- The board of elders sets clear and measurable targets for me to hit.

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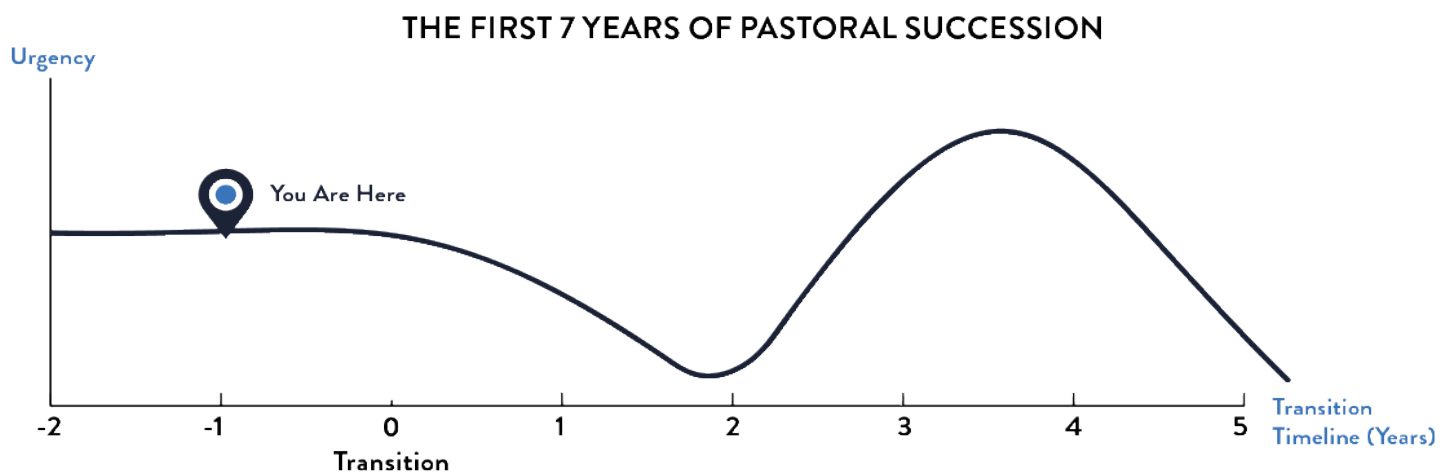


Pre-Transition

Assessing Yourself & the Church (continued)

“Have I evaluated the outgoing pastor?”

- The outgoing pastor has prepared themselves for this transition.
- We’ve set clear expectations and roles for the transition.
- They have a plan for their next season of life and leadership.

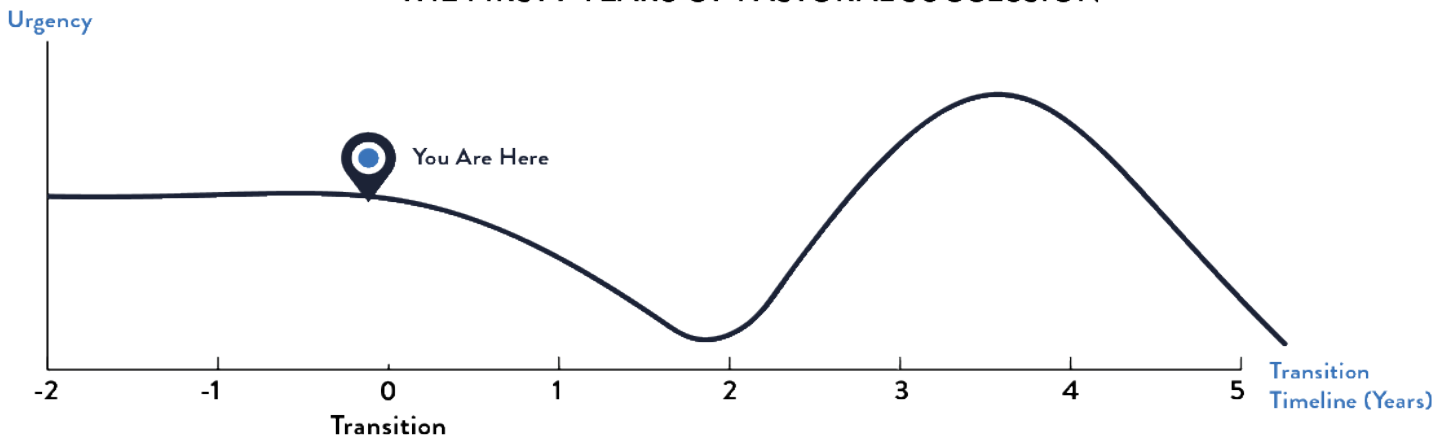


Pre-Transition

Negotiating Your Salary

DO'S	DON'TS
Start salary negotiations after the church has offered you the job. Wait until the church believes you're the best candidate for the job.	Start negotiating too early in the process.
Let the church reveal a salary range or make the first offer.	Reveal your current salary. It's only relevant if the offer is less than what you're currently making.
Pay for a good report and bring facts to the table: <ul style="list-style-type: none"> • Similar sized budget is the best comparison. • Bring recent data—especially important during high inflation. • Adjusted for cost of living in the area—up or down. 	Ignore the fact that everyone will have their own opinion. It's your responsibility to bring facts to the table.
Start by negotiating in quartiles of the salary range, not toward specific dollars: <ul style="list-style-type: none"> • Find agreement on where you stand talent and capability wise. • Since you know you're the #1 choice, you have good reason to negotiate to the upper 2nd or 3rd quartile. (Note: 4th represent the most senior and experienced people.) 	Focus on what your predecessor was paid. That isn't relevant to your negotiation.
Narrow down to a small range before negotiating specific dollars.	Forget that performance-based bonuses can help you get to a specific dollar amount that can't be agreed upon upfront.
Consider non-monetary benefits in negotiations: <ul style="list-style-type: none"> • Work rules & flexibility • Time off • Health insurance • Leadership development resources 	

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Post-Transition

The Honeymoon Phase

Up to 2 years post-transition is what we call “The Honeymoon Phase”. It’s when everything feels great and energized. There are 5 key goals for this phase:

1. Enjoy it.
2. Invest it. Use this time to create a better church in the future.
3. Move past formal authority to informal influence.
4. Develop yourself both as a Manager/Leader and Pastor/Shepherd.
5. Honor the predecessor.

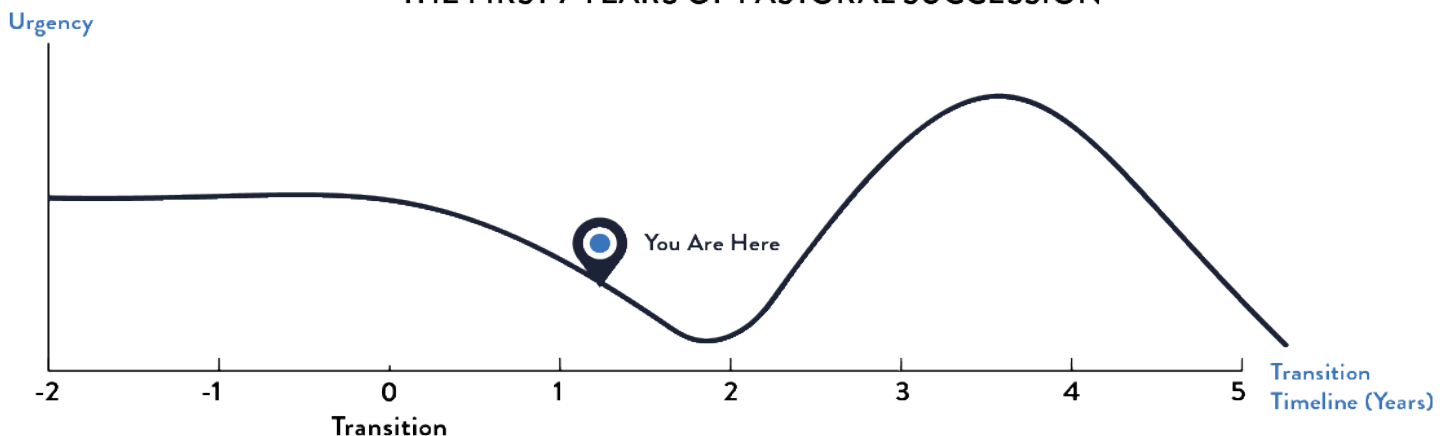
Best-Practices For The Incoming Pastor:

- Go slow. Win over the heads and hearts of the church before doing anything big.
- Develop a set of LENSES to lead through:
 - LENS #1: Diagnostic Focus: Get a deeper understanding of the church and its operations.
 - LENS #2: Relationship Focus: Get to know and begin to build trust with board members and staff.
 - LENS #3: Preaching Focus: Do not neglect preaching. Continue to invest in and develop your preaching.
- Build margin into your schedule. Lots of margin.
- Allow the church to grieve and accept that this will happen.
 - Best book for this phase: [Transitions by William Bridges](#)

Best-Practices For The Outgoing Pastor:

- Run toward something not away from something. Be sure that you have something to move on to—whether that’s a project, job, or something else.
- Schedule time away:
 - Your successor needs space to spread their wings.
 - Your staff need to direct decisions to the new leader.
 - The congregation need to see you trust your successor.
- Rules to follow if you come back:
 - All decisions get made by the incoming leader.
 - Honor each other publicly and privately (no exceptions).
 - Never criticize each other.
 - Only give the incoming leaders your opinion **if they ask** (when you left, you forfeited your voice and your vote).

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Post-Transition

Resistance to Change

After you've won over the hearts and minds of the church, staff, and board, you can start to think about change.

No matter how amazing you think your change is, expect it to be met with resistance. You can prepare for this resistance by acknowledging that the people who react poorly usually react the loudest. Usually, a negative response stems from someone feeling left behind.

Pro Tip: Keep an encouragement file. Write down the positive feedback (kind words, notes, and gifts) that you receive and store in a note or notebook. When you're met with unhealthy resistance, revisit your encouragement file.

DO'S	DON'TS
Take the high road	Fight with ghosts—as concerns arise you need to know the source
Bring in outside experienced help	Allow disunity
Prepare people to be more on mission and less on method	Let your heart get hard
Prepare yourself that some people will leave when something changes they don't like	Be alone—get help before you need it
Invest in getting influencers onboard (even influential naysayers)	
Ensure your staff know they are expected to stay aligned	

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