

Planning for Tomorrow:



EFFECTIVE SUCCESSION STRATEGIES

for Church Leaders





Introduction:

WHY SUCCESSION PLANNING IS ESSENTIAL

The time will come when your church needs a new leader.

That's virtually guaranteed.

Maybe that will happen next month.

Maybe it will happen in 10 years.

Maybe it happens in 50.

Whether you're a senior pastor, an elder, or another key church leader, the importance of planning for this moment cannot be overstated. Succession planning is not just about finding a replacement; it's about ensuring your church's mission continues seamlessly and your congregation remains strong through times of change.

The stats say your church will need to deal with this sooner than you might realize. Last-wave Baby Boomers are now in their sixties. In the two decades between 2000 and 2020, the average age of pastors jumped from 50 to 57. According to a 2019 George Barna Report, half of all pastors were 56 years old or older.

That means your church's time is coming.

Are you ready?

Most likely, you're not.

The American Church's Succession Challenge

The problem isn't getting better, either. In 2022, Barna re-looked at the issue with a fresh set of questions. A quarter of U.S. pastors now say they're ready to retire in the next seven years — and these pastors are saying they are less prepared than ever for this transition. Fewer than half of churches think they're prepared to hand over the reins to a new pastor.

Does that matter?

Absolutely.

Carey Nieuwhof describes the problem like this, "As a former Lead Pastor committed to the next generation, here's what I know: there's no success without succession. If you build your church up only to have it fall apart or stumble after you leave, you'll have neglected one of your most important responsibilities."

When a lead pastor leaves without a plan in place, churches struggle. Some of these struggles you could likely guess. For example, one survey of 125,000 church members in more than 900 churches showed that the percentage of people who were considering moving churches quadrupled in churches after their pastor left. After having an interim pastor for just six months, that percentage quadrupled again to 16 percent. And of course, those numbers could be even higher when pastors who have been at the church for an extended time leave.

While you might expect a church without a transition plan to lose attendance, you might not expect the other consequences that typically follow.

- A drop in staff morale.
- Losing volunteer support.
- A decline of momentum.

But there is an alternative. Prepare for your church's future with an effective succession plan. This guide will show you how to do that. Within these pages, you'll learn:

- The biblical basis of pastoral succession.
- How to recognize when you should start succession planning.
- The different types of succession plans.
- How to prepare the congregation for the transition.
- How to implement a successful timeline for succession.

Churches of all sizes have used the strategies described in this guide to build a succession plan that will help future proof their ministries. While the guide targets senior leaders, its principles are adaptable for other church roles.

At the end of this book, you'll also find several tools that will help you implement your succession plan.

The Biblical Basis FOR SUCCESSION PLANNING

Passing the baton of ministry isn't foreign to the biblical story. In fact, it's the rule rather than the exception—particularly when you look at the Bible's most successful leaders.

Each leadership transition happened at a different stage of what God was doing in the world, so they are different in how they're done. But they each teach us important lessons about how ministry can move toward a new generation of leaders.



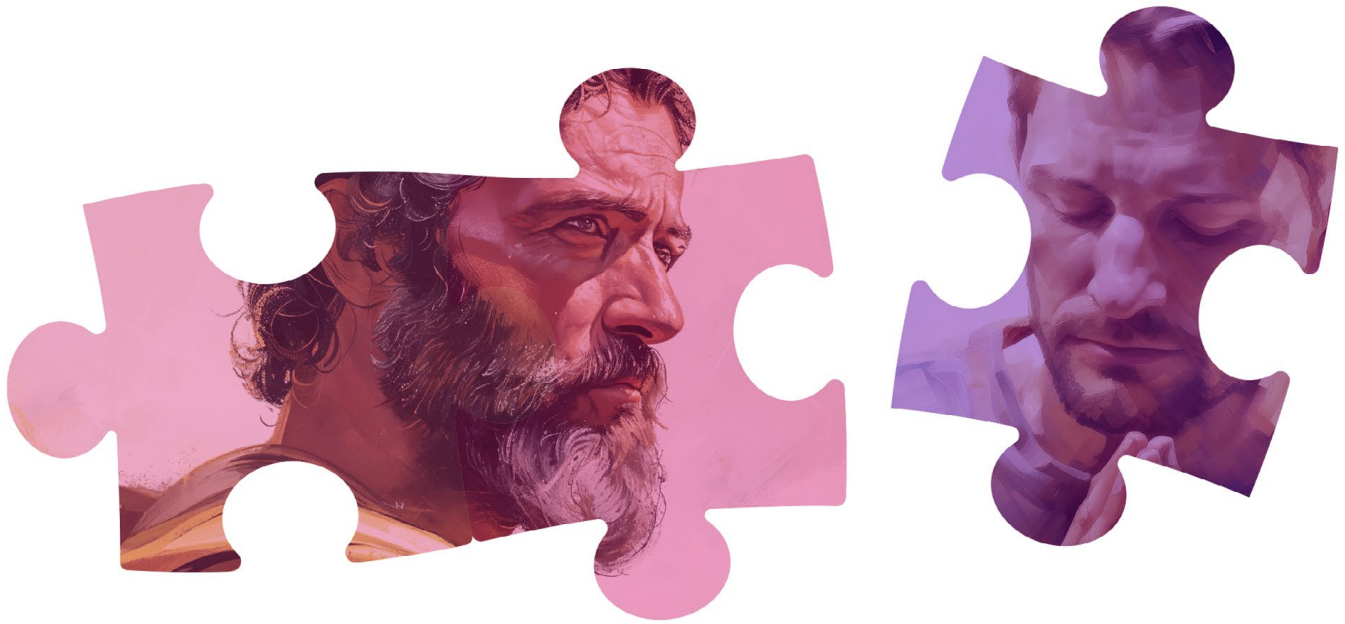
Moses and Joshua

The transition between Moses and Joshua remains one of the most important in Israel's long history. God had used Moses to lead Israel out of Egyptian captivity and to the brink of the Promised Land. If that hand-off had failed, they likely would never have occupied the Promised Land and God's call to bless the world through Israel would have died in the desert.

But Israel's story didn't die. Long before the events of Deuteronomy 34 and Joshua 1 (where Moses dies and Joshua officially takes the reins of leadership), the Bible describes Moses' commissioning of Joshua in Numbers 27. When we look carefully at this transition described in these chapters, we see:

- Moses publicly affirms Joshua (Numbers 27:22).
- Moses clarified Joshua's role for the people (Deuteronomy 1:37-38).
- God tells Moses to publicly encourage and commission Joshua for his ministry (Deuteronomy 3:28).
- God himself commissions Joshua for his new role (Joshua 1:1-9).

The successful leadership handoff between Moses and Joshua was no accident. It was carefully orchestrated, step-by-step.



Paul and Timothy

In the New Testament, we get a similar example in the work of Paul and Timothy. You read about their relationship's development throughout Acts and Paul's letters.

- Paul meets Timothy and invites him into a discipling relationship (Acts 16:1-5).
- Paul endorses the ministry of Timothy to the church in Philippi, describing his character and leadership skills for the church (Philippians 2:19-23).
- Paul affirms Timothy as his “true son” in the faith (1 Timothy 1: 2, 18).
- Paul encourages Timothy to mentor others and raise up a third-generation leader (2 Timothy 2:1-2).
- In what was likely Paul's final New Testament letter, he gives a final charge to Timothy, encouraging him to “Preach the word; be ready in season and out of season; correct, rebuke, and encourage with great patience and teaching” (2 Timothy 4:2).

Paul's relationship with Timothy has long been cited as a model for discipling a new generation of leaders.

Jesus and the Apostles

Of course, the most important passing of the baton in scripture came when Jesus prepared his disciples for their role in his kingdom work. Here are a few of the most important elements of that transition.

- Jesus chose the disciples intentionally (Mark 3:13-19).
- Jesus involved the Twelve in his ministry (Mark 6:7-13).
- Jesus gives the disciples an example of humility and servant leadership through washing their feet (John 13:1-17).
- Jesus promised ongoing support through the Holy Spirit (John 14:25-26).
- Jesus shows the disciples how to handle failure through his reinstatement of Peter (John 21:15-17).
- Jesus commissions the disciples for their ongoing kingdom work (Matthew 28:18-20).



Seeing Succession as Disciple-Making

The Great Commission reminds us that the most important role of the church is to make disciples. It's what Jesus did, and what he calls us to do. It's the prime directive for every church—and by extension, every church's leaders.

Churches that effectively disciple people don't have a succession problem because they create leaders by doing as Paul told Timothy: "What you have heard from me in the presence of many witnesses, commit to faithful men who will be able to teach others also" (2 Timothy 2:2).

The senior leader isn't the only person in the church who needs to be ready to hand over leadership. At some point, every leader in your church will step away from ministry. A robust system that sees discipleship as leadership development prepares every part of your church to take those important next steps as it passes the reins of the church to the next generation.

Recognizing the Need:

WHEN TO START SUCCESSION PLANNING

The time to get started with succession planning is now. If you're committed to creating a system to build leaders in your church, then there won't be a time when you turn a leadership succession process on.

But there might be a time when you need to take your planning to the next level. At that point, you'll begin sifting through candidates before stepping into a deliberate mentoring and transition process.

So, when do you start this phase? Sorry, you won't find a one-size-fits-all date for this. Every church and every pastor will have a different transition timetable depending on their unique situations.

Fortunately, a few different indicators can help you know when pastors and churches should begin asking questions of one another related to succession.

These indicators generally relate to four topics.

Personal Readiness of the Lead Pastor

The decision to start a succession process really hinges on the lead pastor. If they're not fully on board with the timeline for the transition, it's pretty much impossible to pull off a smooth hand-off. Why? Because their buy-in sets the tone for the entire process. Without it, things can fall apart quickly.

There are a number of reasons a lead pastor might want to begin to think about handing off leadership. For example, he may be nearing an age where many of his peers are considering retirement. Generally, that's in the mid to late sixties when people think about their next stage of life (around the time people can expect to get full social-security benefits). While this can sometimes be a little later for pastors, you can expect this to come up in conversations with friend groups about this time.

Family considerations could also be a factor. Consider whether the pastor's spouse is nearing retirement, which could spur these conversations at home. In addition, if a pastor's children or grandchildren are entering a new stage of life that could lead to these conversations as well.

Maybe the most important wild card when it comes to a pastor's readiness to retire relates to health. If a pastor has experienced health problems or significant energy decline in recent years, he might be ready to step down.

Church Health and Growth

Just like people, churches have a life cycle to them. Every church goes through periods of growth, stagnation, and decline. Many factors combine to form this cycle, but a big part of it is pastoral leadership.

Churches that have experienced long periods of stagnation and decline may benefit from a change of leadership. Often, this isn't about the ineffectiveness of the pastor; it's simply a matter of timing.

Declining/plateauing attendance, membership, and engagement can all lend itself to these considerations.

Organizational Structure and Vision

Major transitions in organizational structure also play a part. For example, if a church is expecting multiple leaders leaving the church in coming years, it's likely a change in senior leadership will be needed (or at least should be considered). Or if the church is planning on a major new building campaign, a new leader—who can see the campaign to the end—may be needed.

Demographic changes in the church (whether the church is aging, getting younger, growing through a specific ethnicity, etc.) may signal a need for a leadership shift, too. Your goal is to match your leadership to the future direction of the church.

External Factors and Challenges

Even changes outside of your church can trigger a succession plan. For example, if your community demographics are shifting, you may need a new leader to reach your new neighbors.

Economic factors may also play a part. If your community experiences economic decline (particularly if it's expected to be a long-term situation), you may need a different leadership strategy to more effectively steward resources moving forward.



Pastoral Readiness: GARRY BALDWIN'S STORY

Pastor Garry Baldwin joined Midwood Baptist Church in Charlotte back in 2004 and guided it through steady growth over the years. As he got closer to his sixties, thoughts of retirement and spending more time with his family—especially his four grandkids—started to take center stage.

At a 2017 Lifeway Christian Resources conference on succession planning, it really hit him how crucial it was to make sure the church wouldn't be left in limbo once he stepped down. That's when he started mapping out a plan to set the church up for a smooth transition.

Baldwin established an 18–24-month process to help prepare a younger leader for the role. After a detailed search, Baldwin and the church settled on John Maiden, who was serving at an associate pastor in Raleigh. Baldwin and Maiden then agreed upon a detailed, written-out transition process that culminated in Maiden becoming the church's senior pastor in 2023.

Since the transition, the church has grown by about 20 percent. Most of that growth has come from young families. Maiden credits Baldwin's humility and detailed plan for the successful leadership transition.

Types of Succession Models FOR CHURCHES

As mentioned several times already, every succession process is unique. But most fit within three broad categories. Each has its own strengths and weaknesses.

Internal Succession

These churches choose a successor among people already within the church. Often, these leaders are already serving in another pastoral role on staff. Some of the most well-known and successful church leadership transitions have followed this pattern in recent years.

Many of the advantages are obvious. First, the successor will come into leadership already familiar with the church's culture and operations. At times, this means you can shorten the transition period because the familiarity will smoothen the process out.

Maybe the most important benefit is the opportunity for your senior leader to mentor his successor even before a formal announcement to the congregation comes. Plus, when the specific mentoring toward the senior leader position starts, there will already be a relationship to build upon.

In his book, *Transition Plan*, Bob Russell tells the story of the leadership transition of Southeast Christian Church in Louisville, one of the largest congregations in the country. In 2006, he officially passed the reins of the church to Dave Stone, who had served at the church for nearly two decades at that point. That was the culmination of a process that began with an announcement by Russell back in 1999. Over the next seven years, Stone took on more and more leadership responsibilities and preached more and more. The church's transition has become a model for many other churches in its smoothness and effectiveness.

But there are weaknesses in this approach, as well. For example, churches that focus on an internal transition can have tunnel vision and bias when choosing the next senior leader. While it's certainly an advantage to have a strong internal candidate, it's still possible that the best candidate isn't currently on your team.

Plus, an advantage of transferring leadership is getting a new perspective on the ministry. People outside of your church will see ministry opportunities no one will see on the inside. You'll miss this if you focus only on an inside candidate.

If you choose to go with an internal candidate, make sure you have an obvious choice. Don't pick someone on the inside just because you know the person well.

External

An external succession process takes the opposite approach to an internal one. Instead of raising up a new leader from within their staff, churches look outside their own team to find a successor. Midwood Baptist Church (which we talked about earlier) is a good example of this.

There are usually a couple of ways this can play out. Some churches go the formal route, opening up an application process to gather candidates. Others take a more casual approach, tapping into their networks to identify and reach out to potential leaders outside their congregation.

As you might expect, the pros and cons of this approach mirror the internal ones. You'll increase your chances of bringing in a fresh vision and new ideas. This can be particularly important for churches that have declined or plateaued in recent years.

When you go this route, you'll also have the opportunity to be more objective in choosing a candidate. You and your team likely won't be clouded by a personal relationship as you evaluate the fit with your church.

But you'll need to give this new leader time to get adjusted to your church's unique culture. That might mean you need to provide a longer on-ramp during the transition process.

Because your congregation doesn't know the incoming leader, you also increase the risk of resistance from your congregation.

Co-Pastoring

To be clear, a church can go down a co-pastoring path, whether they've found the successor using the internal or external process. It's simply a matter of including a period in the transition where both the outgoing and incoming leader serve together.

This provides the incoming leader with "real-time" mentorship as the two work together to guide the church. The new leader can learn from the outgoing pastor along the way. It also reduces the potential conflicts that could come from a more abrupt transition.

But of course, unless role clarity is brought from the beginning of this stage, this strategy could easily lead to confusion.

Preparing the Congregation FOR TRANSITION

Getting your congregation ready is crucial when you're planning a pastoral transition. The longer your pastor has been with the church, the more important—and usually longer—the transition process needs to be. Saying goodbye to a pastor who's been around for five years is a whole different ballgame than one who's been serving for 40. It's important to understand that the approach, timing, and communication need to reflect the depth of the connection and history involved.

Early Involvement Strategies

The earlier you can engage with your congregation about the transition, the better. It's tempting for many pastors to delay announcing their retirement for as long as possible. Many fear becoming a lame-duck leader.

But cuing in the congregation of a long-time leader's transition away helps not only involve the congregation in the process, but it gives them time to say goodbye. Here are a few strategies to get you started.

- **Let your pastor announce it from the pulpit.** As you'd expect, you want the people to hear this from the pastor first. At the end of a Sunday sermon is a good time to share it. Provide a handout that details the next steps in the plan. You don't have to have everything worked out, but you should have a clear idea of what's next.
- **Begin regular Q&A sessions.** The frequency will depend upon your timetable, but consider doing sessions at least quarterly. Schedule the first one within a month of the initial announcement. Let the congregation ask questions of your lead pastor, anyone involved in the search for the next pastor, and eventually the incoming pastor.
- **Use surveys to get feedback.** Good communication goes both ways. Make sure you have an effective way to listen to what the congregation is saying. The Q&A sessions are a start, but not everyone will want to ask questions in that kind of format. Plus, this allows both quantitative and qualitative input. (*See the Appendix for a sample survey you can send.*)



A Communications Plan

Keeping everyone informed is going to be a big part of how you navigate this transition well. Communication will be the glue that keeps your congregation—and even your broader community—connected and on the same page. To do it right, you'll need a clear, long-term strategy in place before word about the transition spreads. Here's what that might look like:



- **Timeline for Announcements:** Map out the key moments when you'll need to share updates. Think about things like the initial announcement, periodic check-ins during the mentoring phase, and, of course, the final transition date.
- **Communication Channels:** Decide where and how you'll share information. Will it be through email, social media, Sunday services, or all of the above?
- **Key Messages:** Create and stick to a set of consistent talking points. This ensures everyone hears the same message, no matter who they talk to or where they hear it. Consistency is key to avoiding confusion or mixed signals.

By getting all of this squared away ahead of time, you'll make the process feel smoother and more intentional for everyone involved.



Creating a Successful TRANSITION PROCESS

There's no single, foolproof way to navigate a successful transition process. Every church is unique, and what works for one might not work for another. That said, there are some basic principles most churches should keep in mind to help things go more smoothly.

- **Prayer:**

Your church isn't transitioning to a new CEO. You're transitioning to a new shepherd. God's presence needs to be a strong part of the transition. Note what Moses did in Numbers 27:15-23. He didn't start by hiring a headhunter. Nor did he schedule a meeting with his leadership team.

Moses prayed: "The LORD is the God of the spirits of all people. May he choose a leader for these people, who will go in and out before them. He must lead them out like sheep and bring them in; the LORD's people must not be like sheep without a shepherd" (vv. 26-17 NCV).

Prayer isn't simply a principle to be used as lip service to your succession process; prayer is applied to every stage of your plan. It's the starting point and the ending point.

- **Transparency:**

Decide from the beginning that you won't keep secrets during this period. Certainly, it makes sense to progressively release information to a larger audience throughout the process. But make sure you have specific reasons for any information you're not communicating. The danger in holding back information from the broader staff team, the congregation, and even the community is that when information gets out, church leaders may appear to be hiding something.

- **Resilience:**

A succession process can be a long and winding road. Bumps will come. From the beginning, your team needs to be committed to seeing the process through, no matter what pops up. When you embrace resilience, you promote a proactive attitude for the tough parts of the process, so they don't slow your momentum down.

- **Collaboration:**

The more people who feel included in the transition process, the more likely it is that your succession will be successful. Try to involve as many people as you reasonably can. Gather input not just from staff and congregants about who the successor should be, but also about how the process itself should take shape. That involvement will look a little different depending on the group you're engaging—how you work with your leadership team won't be the same as how you collaborate with the larger congregation. The key is to involve others in ways that make sense for their roles.

- **Adaptability:**

Your plan will change. If it doesn't change along the way, you're likely not being flexible enough. You may shorten the plan or lengthen. You may add new components, or you may reduce them. Regularly make sure you're evaluating the process with all the stakeholders (outgoing pastor, incoming pastor, lay leaders, staff leaders, etc.) to see what's working and what isn't. Don't be afraid to make changes when necessary.

- **Honoring Legacy:**

You're not just welcoming a new leader; you're also saying goodbye to one as well. Take care not to move too quickly through the process. Honoring legacy of your previous leader isn't just kind; it's biblical, and it makes good ministry sense.

What this means for your church will be heavily impacted by your church tradition and the length of time the previous pastor was at your church. This could look like ...

- Hosting a farewell event to celebrate the retiring pastor and his impact.
- Presenting your outgoing pastor a with a meaningful gift.
- Creating a video or memory book highlighting the pastor's ministry.

Just remember that honoring the legacy of the outgoing pastor is more than just a few events and activities. It's a principle that should guide the entire process. Think of it as the foundation for making thoughtful and respectful decisions along the way.

Phases of a SUCCESSFUL TRANSITION

A successful pastoral transition has four basic phases. The length of these phases will change depending upon a church's unique situation. (The timeline below is simply a broad estimate.) Also, many of the details may change depending upon the church polity.



Decision (3-5 years before the transition)

Everything starts with the pastor's decision to step away from the ministry. While there are indicators of when this decision is more likely (see section 3 of this guide), it can happen at any time. The pastor then alerts key leaders and staff of the decision. Together, they begin to outline the broad strokes of a transition plan.



Announcement (3-5 years before the transition)

The pastor makes a public announcement of the decision (likely at the tail end of a worship service). You begin to engage the church community through consistent updates, scheduled Q&A sessions, and surveys, etc.



Mentorship (3-4 years before the transition)

Depending upon your church polity, form a pastoral search committee or identify the people who play a part in evaluating potential candidates. This group will begin to evaluate potential candidates (whether internal or external). A candidate is chosen and brought before the larger church body for evaluation. Once a candidate is chosen, the outgoing leader begins an agreed upon process of mentoring in the key elements of the role.



Hand-off (Final year of transition)

During this last stage, the outgoing leader hands off various parts of his responsibility. Preaching responsibilities will gradually move toward the incoming pastor. The incoming leader will take over staff leadership responsibilities. By the end of the period, all tasks are given to the incoming leader and the outgoing leader serves as a guide and a sounding board.

The process culminates in a farewell service for the outgoing leader and a commissioning service for the incoming leader. Ideally, this is a single service, but you could split it into two depending upon your church tradition.

Succession: A HOLY MOMENT FOR YOUR CHURCH

Succession isn't just a leadership transition for your church. It's a holy moment in the life of your church, an opportunity to honor the past, celebrate the present, and trust God for the future. It's a chance to reflect the faithfulness of God to the church family and the broader community.

Do this faithfully and you'll set your church up to continue the mission God has given you for years to come. Trust that God has the best days ahead of your church as you move toward the future he is preparing for you.

Let this become a spiritual marker your congregation will remember for years to come.

