

The Importance of Succession Planning

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In recent years, when the UMJC has discussed the topic of succession planning, the tendency has been to focus on raising-up younger leaders (hence our K20 program) or helping present rabbis to prepare financially for retirement (hence our UMJC GuideStone program). But surprisingly, little attention has been given to the question: If we train and credential a new generation of leaders for our movement, and our present leaders are able to transition out, will our communities be ready, willing and able to receive the new leaders? Or to put it another way, do we have succession plans in place to help make our communities ready? This is the subject that I would like to address with you this morning.

Why Do We Need a Succession Plan?

There are at least five reasons why every congregation needs a succession plan:¹

-First, we who are rabbis will all pass away one day.

-Second, as congregational leaders, some of us will lose imagination and energy as we age. Ten years from now, about half of all UMJC leaders will be over the age of 70 according to my 2010 study on aging trends of UMJC rabbis.²

-Third, older leaders risk losing the ability to inspire younger leaders. In his book *Transition Plan*, Bob Russell writes, “While we may not feel older, those who are 20 or 30 years younger regard us as old and out-of-touch. That may not be true, but perception becomes reality. When I stand up to preach at 66 years of age, I am regarded as old by those in the 20-40 age bracket, and I have serious barriers to overcome. I can say the

¹ Bob Russell, *Transition Plan* (Louisville: Ministers Label, 2010), 42-45.

² David J. Rudolph, “A Wake-Up Call: Aging Trends of UMJC Congregational Leaders,” May 3, 2010. Online: www.rabbidavid.net/papers.

same words as a 30-year-old Minister, and still fail to capture the attention of a younger generation as much as someone closer to their age.”³

-*Fourth*, the Lord has plans for us *after* we transition out of our roles as congregational rabbis. He has other things for us to do, important things.

-And finally, *fifth*, it is in the best interests of our synagogues to have a succession plan. We have to pass the baton to our successor and do it in a careful way, for the sake of *l’dor vador*, for the sake of the next generation. If we do not have a well-thought-out and orchestrated succession plan, it is very possible for the congregation to be turned upside down due to the unnecessary anger, grumbling, anxiety, sadness, disorientation, depression, grieving, and division that can result from internal struggles with change.⁴ It is easy to underestimate the difficulty that people have with change.

Why Is Change So Difficult for People?

Here are some snippets from the experts:

-“Change arouses the survival instincts.”⁵

-“Change, like most things in life, starts small and grows larger.”⁶

-Rabbi Edwin Friedman writes, “Those who come first are the last to accept new ideas”. This is the paradox of the change agent who, once his or her change is completed, tends to block or stall the new changes someone else wants to implement.⁷

³ Russell, *Transition Plan*, 43.

⁴ See William Bridges, *Managing Transitions: Making the Most of Change* (Philadelphia: DaCapo, 2009), 26-30. “One of the dilemmas of leading change in a congregation is that it naturally engages negative and angry feelings. These negative feelings develop as general anxiety begins to increase because of the awareness of change that faces the congregation. As the anxiety increases, it begins to become more focused and people are able to identify what they fear they will lose in the change. The fear prompts the basic reaction of fight or flight that has been hardwired into all of us and into groups. It is a natural and normal response. As anxiety increases and begins to find focus, some people will stay to fight for or against the change and will express anger. Others will distance themselves from the congregation, either leaving quietly so as not to engage any further discomfort or leaving with parting shots such as, “This certainly isn’t what I go to church (or synagogue) for!” Obviously, not only is the congregation acting out of its fears, but it prompts fear and other feelings in the leaders as well. Suddenly the whole congregation becomes reactive” (Gilbert R. Rendle, *Leading Change in the Congregation: Spiritual and Organizational Tools for Leaders* [Herndon: The Alban Institute, 1998], 107).

⁵ Peter L. Steinke, *Congregational Leadership in Anxious Times: Being Calm and Courageous No Matter What* (Herndon: The Alban Institute, 2006), 79.

⁶ Steinke, *Congregational Leadership in Anxious Times*, 79.

⁷ Steinke, *Congregational Leadership in Anxious Times*, 79.

-“Resistance to the new is stronger if it is less familiar.”⁸

-“You can never make only one change. Change here creates change there.”⁹

-“The fear of too much change is the fear of being out of control...the fear is that something important will be lost in the process.”¹⁰

Are We Prepared to Let Go?

I have three daughters: Hana, Elisa and Miryam. Hana just finished college, Elisa just began college, and Miryam is in seventh grade and getting all of our attention ☺. There is a lot of change going on in the Rudolph family.

About a month ago, Hana accepted a job offer to work at a global security think tank in Washington, D.C. She is now living in her own apartment in the city, paying her own bills, and is an active member of Beth Messiah Congregation in Gaithersburg, Maryland. Seeing Hana make these huge life transitions has made me feel that I have completed an important task as her father—I have helped Hana to leave the nest and fly on her own.

So what’s next on the horizon in our father-daughter relationship? I have known from the beginning that one day, G-d willing, I will walk Hana down the aisle. And there at the end of the aisle will be a young mensch of a fellow waiting for her, someone the Lord has provided who will take Hana’s hand and care for her all her days. Harumi and I have prepared ourselves, and Hana, for the day when we have to let go. Similarly, as rabbis, we have to prepare ourselves, and our congregations, for the day when we all have to let go.

Two Types of Congregations

Generally speaking, there are two types of congregations: those that are more *rabbi-focused* and those that are more *mission-focused*. Preparing to let go involves making our congregations more mission-focused than us-focused. To the extent that we as rabbis are the lynchpins of our communities, we make it all the more difficult for a new rabbi to “transition in” without major upheaval. In his book *Healthy Congregations*, Peter Steinke

⁸ Steinke, *Congregational Leadership in Anxious Times*, 80.

⁹ Steinke, *Congregational Leadership in Anxious Times*, 79.

¹⁰ Rendle, *Leading Change in the Congregation*, 9.

describes the difference between clergy-focused congregations and mission-focused congregations. Please take a look at the handout entitled “Where’s Your Focus?”:¹¹

Clergy-Focused Congregations	Mission-Focused Congregations
1. Excessive focus on clergy (difficult to think of the rest of the system); overinvested in clergy (“hero or goat”); clergy primarily responsible for what happens	1. A clear focus on identity and destiny
2. Dependency encouraged (parent/child arrangement); no activity without clergy present.	2. Stewardship emphasized; responsibility is distributed; interdependence
3. Neediness is enabled	3. Needs are met without promoting dependency
4. Clergy expected to motivate, uplift, or rescue people	4. Clergy expected to organize people toward mission
5. Inflexible roles (survival depends on a prescribed way of functioning)	5. Resiliency in functioning
6. Cycle of emotional fusion (lack of “distance”; clergy not seen as separate individuals; clergy are “owned”)	6. Clergy are separate selves; clergy set goals and take stands
7. “We” (very few speak for themselves); allow inappropriate behavior to exist, no one confronts or speaks up	7. “I” positions are respected; lots of dialogue (physicist David Bohm says, “Dialogue means not winning points”)
8. “Consensus sensitive” (difference is seen as attack, can’t survive if we don’t agree); clergy is the hub of harmony	8. Vision sensitive (differences are tolerated because vision guides and solidifies people)
9. Disagreement is dangerous (calm surface)	9. Conflict is normal, essential, and managed
10. Closed system (lack of “oxygen,” no corrective feedback, novelty is not entertained)	10. Open system (lots of information, new ideas, feedback loops)

An important question for us to ask is: How many of our UMJC congregations are clergy-focused and how many are mission-focused? I am unable to quantify this but I think, based on my anecdotal experience over the past 40 years that the vast majority of our congregations are clergy-focused. And as such, there is an over-dependence on our rabbis. Over-dependence on us makes it all the more difficult for our congregations to receive new senior leaders since the loyalties and affections of congregants do not automatically transfer over to a new leader. We need to begin succession planning now to help shift our congregations from being clergy-focused communities to being more mission-focused communities.

¹¹ Peter L. Steinke, *Healthy Congregations: A Systems Approach* (Herndon: The Alban Institute, 2006), 46-47.

But what if we are not able to make this shift in time? What if our congregation is still a clergy-focused congregation at the time of our departure? What can we do to make the transition less rocky?

In their book *The Elephant in the Boardroom: Speaking the Unspoken About Pastoral Transitions*, Carolyn Weese and J. Russell Crabtree argue that clergy-focused congregations can be broken down into two types of cultures: *Family Culture* congregations and *Icon Culture* congregations.¹² In the Messianic Jewish community, most of our congregations are of the Family Culture variety. In Family Culture congregations, the community “assumes the sociological configuration of a family or tribe. Leaders in this culture are not first defined in terms of programs or position but in their particular relationship to the community...the core functions are relational rather than administrative...”¹³ The rabbi is a “leader within the family.”¹⁴

Weese and Crabtree go on to explain that the “second idea that drives the family culture is the importance of continuity. Traditions established by the family and its leader are sources of stability and strength in the culture...Pastoral transitions that interrupt these routines or introduce novel elements can create significant anxiety in a family culture and need to be carefully managed...The values of a family culture tend to reward shared history, longevity, pedigree, loyalty, local tradition, obedience, insiders, the family unit, children, storytelling, practical service, sacrifice, duty, informality, and being together. The values of a family culture tend to penalize (or are passive toward) an emphasis on effectiveness, discontinuous change, methods, formal processes, experts, credentials, measuring, benchmarking, and outsiders.”¹⁵

In Family Culture congregations, the loss of the senior leader is often experienced as “equivalent to that of a death or divorce...This leads to all the classic dynamics of grief that have been well documented: shock, denial, anger, guilt, bargaining, depression, and acceptance.”¹⁶ Grieving often leads to anxiety and resentment, which often leads to hurtful words and actions, not uncommonly directed at the new leader. My point in saying this is not to suggest that all of these expressions of the grieving process are appropriate but that this cycle of behavior is predictable unless something is done to head it off.

Therefore, two critical transition tasks in a Family Culture congregation are “grief management and tradition maintenance...Members must have opportunities to mourn their loss. An interim leader with therapeutic skills in grief management can be helpful to

¹² Carolyn Weese and J. Russell Crabtree, *The Elephant in the Boardroom: Speaking the Unspoken About Pastoral Transitions* (San Francisco: Jossey-Bass, 2004), 63.

¹³ Weese and Crabtree, *The Elephant in the Boardroom*, 69.

¹⁴ Weese and Crabtree, *The Elephant in the Boardroom*, 69.

¹⁵ Weese and Crabtree, *The Elephant in the Boardroom*, 69-72.

¹⁶ Weese and Crabtree, *The Elephant in the Boardroom*, 69-73.

a family culture in this time of loss. Members need permission to give expression to their grief in the many and varied ways that people respond to loss.”¹⁷

For this reason, when it comes to Family Culture congregations, the question of timing for the rabbinical transition is key. Some congregations opt for “*sequential timing*”, that is, the new rabbi arrives immediately after the outgoing rabbi leaves. Other congregations choose “*overlap timing*”, i.e., both rabbis serve the community together for a season before the departing rabbi leaves. While every congregation is different, and there are advantages and disadvantages to both of these approaches depending on the nature of the congregation and the rabbis involved, Weese and Crabtree highly recommend the “*delayed arrival*” approach when it comes to Family Culture congregations. This means that after the outgoing rabbi has left there is a delay of several months or even more than a year before the new rabbi arrives. “This gives members an opportunity to work through feelings of loss and emerge into a hopeful attitude for the future.”¹⁸ Delayed arrival requires tapping an interim rabbi, a lay professional or a skilled volunteer who is willing to stand in the gap during this grieving period and help prepare the community for receiving the new rabbi.

¹⁷ Weese and Crabtree, *The Elephant in the Boardroom*, 74. “Tradition maintenance provides continuities in the rituals that are the key to the family culture’s well-being. There is an art to determining which local traditions are vital to the community’s identity and should not be disrupted and which are tied to the former leader and should be let go” (Ibid). “The biggest challenge for a new pastor is to control the desire to make changes during the first few months....Many clergy in new pastorates rush to make cosmetic changes, rather than changes with real substance. Most often, these changes are in the corporate worship of the congregation—probably the worst place to make changes, since they affect the greatest number of people most quickly and in the least rational feature of congregational life...When a pastor makes changes before getting to know the congregation, people feel that the pastor is rejecting not only their way of worshiping God and their programs, but also them personally. With the feeling of rejection comes the thought, ‘If you really love us, why did you come in and change our way of doing things?’ Rather, a new pastor should spend the first 9 to 12 months being a lover and a historian. The lover finds something to love in everyone. Clergy probably underestimate how important it is for people to sense that their pastor likes them. Clergy tend to be more anxious about whether or not people think they are competent and so devote their energy to trying to demonstrate competence. While competence is important, it is less so than loving people...It takes a new pastor 9 to 12 months to establish the kind of ‘liking’ relationship with the congregants who influence decisions to pave the way for any major change the pastor may propose, especially a controversial one...In addition to being a lover for the first 9 to 12 months in a new congregation, the pastor should become a historian of the congregation...By learning the history of the congregation, the new pastor can begin to see more clearly how and why the congregation functions as a total system, and why some of its preferences and practices have become so firmly established. An understanding of the congregation’s history may help the pastor decide which changes can be made, and on what time schedule...The first change a new pastor introduces should be a major one, which, if successful, will move the congregation to a new level of living and loving...The only secure way to make change is by understanding the congregation and securing the trust of those with the most influence in decision-making, and persuading them that a particular change is necessary. While there are cases in which an early change has succeeded, that is not usually the case. Early changes are risky and many pastors who have tried early changes that failed miserably have doomed their ministry in the congregation ever after. Of course, with every rule there are exceptions. The challenge for clergy beginning a new pastorate is to decide if some unique circumstances require immediate attention. In any case, any change a pastor and congregation decide upon, at whatever point in their life together, should be based on broad support and prayerful consideration” (Roy M. Oswald, James M. Heath and Ann W. Heath, “Preparing to Make Changes,” in *Beginning Ministry Together: The Alban Handbook for Clergy Transitions* [Herndon: The Alban Institute, 2003], 129-31).

¹⁸ Weese and Crabtree, *The Elephant in the Boardroom*, 76.

If a congregation does not go through a guided grieving process prior to the arrival of the new rabbi, the new rabbi may be stepping into an unstable and volatile situation. It is not uncommon for the new rabbi in these circumstances to become a lightning rod of all the grief-based anxiety and anger still in the air.

Adding fuel to the fire, if the outgoing rabbi has not grieved or let go himself, this can make it all the more difficult for the new rabbi to gain acceptance in the community and move forward in effectively leading the synagogue. To prevent this scenario from happening, it is important that boundaries be established for the outgoing rabbi's involvement in the community. Boundaries should be discussed and agreed upon in advance as part of the transition plan. I highly recommend Edward White's book *Saying Goodbye: A Time of Growth for Congregations and Pastors*¹⁹ and the essay "When the Departing Pastor Stays in Town",²⁰ which is included in your handouts packet.

A new rabbi can easily be overwhelmed by the downward cycle of a grieving congregation and decide it is not worth continuing at the community or in the rabbinical profession at all. According to the Alban Institute, "at least a third of calls in recent years have resulted in a troubled or unhappy match within the first year...A bad match can be costly to the congregation in terms of lost opportunities, lost members, and psychological pain. It can be financially devastating if it results in severance pay, new search expenses, or even lawsuits."²¹

How Can the UMJC Help?

What can our national organization do to help us prepare for the more than 50 congregations, mostly clergy-focused/Family Culture oriented, that will face transitions in rabbinical leadership over the next 15 years?

First, we can create a UMJC Succession Planning Guide and Checklist that outgoing rabbis, incoming rabbis, elders and executive committees can carefully work through to avoid common problems.

Second, the UMJC needs to train interim rabbis and lay leaders to help our congregations make the transition. Given the present shortage of younger Messianic rabbis, interim leaders will be that much more needed in the coming years. Interim pastors are common

¹⁹ Edward A. White, ed., *Saying Goodbye: A Time of Growth for Congregations and Pastors* (Herndon: The Alban Institute, 1990).

²⁰ Roy M. Oswald, James M. Heath and Ann W. Heath, "When the Departing Pastor Stays in Town," in *Beginning Ministry Together: The Alban Handbook for Clergy Transitions* (Herndon: The Alban Institute, 2003), 88-90.

²¹ Robert T. Gribbon, "Foreword," in *Beginning Ministry Together*, vii-viii.

in many of the mainstream Christian denominations when pastors move on because these denominations have learned from the past and know how difficult these transitions can be. In our community, an interim rabbi or lay leader can make all the difference in the world to a congregation, especially after its founding rabbi, or rabbi of many years, has retired, moved on or passed away. The interim rabbi or lay leader helps the congregation to prepare for the hiring of a new rabbi, someone other than himself, and he walks the community through the grieving process. Without an interim leader to help with the transition, the new rabbi may become an “*unintended* interim leader.” The last page of the handouts is a bibliography that includes a number of key works on interim ministry. See especially the book edited by Roger Nicholson, *Temporary Shepherds: A Congregational Handbook for Interim Ministry*.

Third, we need UMJC rabbis who are trained to assist leaders and congregations with their transitions, rabbis who know the territory and can offer wise consultation to guide the way. Ideally, we should have a formal training process for these “transition companions” as they are called. The Alban Institute in Herndon, Virginia, has consultation resources that we can draw on to help us in this area. Their website is www.Alban.org.

We have a lot of work to do in the UMJC to see our congregations successfully transition and pass the baton to new leaders over the next 15 years. Succession planning needs to begin now if the next generation is going to build on the gains we have made over the past 40 years. Let us not shrink back from this task but let us embrace the challenge head on, with clear direction, holy anticipation and a sense of completion, even as Paul said to his own successor, Timothy, in 2 Timothy 4:5-8:

But you [Timothy], remain steady in every situation, endure suffering, do the work that a proclaimer of the Good News should, and do everything your service to G-d requires. As for me, I am already being poured out as a libation, and the time of my departure has come. I have fought the good fight, I have finished the race, I have kept the faith. Now there is in store for me the crown of righteousness, which the Lord, the righteous Judge, will award to me on that Day — and not only to me, but also to all who have longed for his appearing.

Let us learn to let go and work hard to prepare our congregations for the day when we hand them over to a next generation of leaders. Let us strive to make them mission-focused congregations that are more able to handle the change from one senior leader to the next.

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