Guidelines for Transition Teams

Roles and Responsibilities during Interim Ministry

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The United Church of Canada
L’Église Unie du Canada

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Contents

This resource, intended for members of Transition Teams, provides a detailed description of each of the tasks of a Transition Team.

For an overview of Interim Ministry as it is practised in The United Church of Canada see *Introducing Interim Ministry: A Process of Change for Congregations* (2010), available from UCRD or www.united-church.ca/handbooks.

God of the guiding star, the bush that blazes
Show us your way

God of the stormy seas, the bread that nourishes
Teach us your truth

God of the still, small voice, the wind that blows where it chooses
Fill us with life

God of the elements of our inward and outward journeys
Set our feet on your road today.

~Ruth Burgess

God, you are always calling your people
to follow you into the future,
inviting them to new ventures, new challenges,
new ways to care,
new ways to touch the hearts of all.

When they become fearful of the unknown, give them courage.

When they worry that they are not up to the task,
remind them that you would not call them
if you did not believe in them.

When they get tired,
or feel disappointed with the way things are going,
remind them that you can bring change and hope
out of the most difficult situations.

~Neil Paynter

Acknowledgements:
1. "Pilgrim liturgy of healing," **Praying for the Dawn: A Resource Book for the Ministry of Healing**, *Wild Goose Publications, 2000. © Ruth Burgess. Reprinted with permission.*

2. "Prayer for the Days, Day 1" by Neil Paynter © 2002 Neil Paynter.

Introduction

The Call to Lead

Congratulations! The congregation of your church has decided to take time out from its normal life, and has launched itself on an intentional Interim Ministry—an exciting journey of exploration and discovery.

You, with others from the congregation and two presbytery representatives, have been chosen to serve on a Transition Team. Working together with the Interim Minister, you have the interesting and challenging task of helping your congregation find its way through a process of self-study and visioning to renew its call to mission.

May you find it an exciting and rewarding experience!

Guidelines for Transition Teams

The shorter booklet *Introducing Interim Ministry: A Process of Change for Congregations* provides a brief overview of the structure and responsibilities of Transition Teams. *Guidelines for Transition Teams* is intended to help Transition Teams understand their role and responsibilities within the church in some detail, so that they can effectively lead a congregation through a process of transition and renewal.

The sections of this resource are presented in the order in which they become relevant to a Transition Team. As you begin, however, you will find it useful to browse through the document as a whole to gain an idea of the totality of the interim work.

The appendixes offer examples, exercises, or other suggestions that further explain certain ideas. You may use any of these that you find to be relevant to your work. A reading list is included at the end.

Be of Good Heart

In a newly formed Transition Team, members may feel some worry about the task ahead of them. However, be of good heart! Many other churches have used Interim Ministry to explore their way to the future. There is information, encouragement, and support for the work ahead.

You are not alone in this journey…

Starting Out

Overview of Transition Team Responsibilities

As soon as a Transition Team is appointed, its work begins by assisting presbytery with the recruitment and selection of an Interim Minister. After that, the continuing tasks of the team are to work with the Interim Minister to

- review, clarify, and develop the overall goals set for the Interim Ministry by presbytery and the official board (or equivalent)
- identify and implement measures for promoting conversation, learning, understanding, and transition in the congregation
- involve the congregation in the tasks of claiming identity and mission, clarifying its intentions for the future, and renewing its links with the larger church
- exemplify the patterns of responsible participation, healthy relationships, and faithful witness that create and re-create Christian community

The Transition Team reports its progress to the official board (or equivalent) through its representative on that body, and to presbytery through the presbytery representatives on the Transition Team.

Halfway through an Interim Ministry, the Transition Team reviews how the transition work is progressing. At that time, the team will consider the congregation's progress toward the interim goals, and in particular, assess how thoroughly the congregation has identified and claimed its new mission. Only when the mission is well understood is it appropriate for the Transition Team to signal the presbytery to initiate a Joint Needs Assessment Committee.

A final evaluation of the congregation's transition work must be completed at least 90 days before the end of the Interim Ministry. At that time, presbytery will ask for a final evaluation of the Interim Ministry, including how effectively the congregation's goals have been met and what continuity may be needed. An evaluation of the effectiveness of the Interim Minister will also be required at that time. The presbytery forwards these evaluations to the Conference Interim Ministry Committee.

The Transition Team's work finishes as the congregation says farewell to the Interim Minister and shifts from the transition process into the practice of its faith in a renewed ministry. Members of the Transition Team will likely continue in leadership roles, formally or informally, on the church's official board (or equivalent) and on other key committees. Their continuing leadership will be valuable in ensuring that initiatives taken in the Interim Ministry period are put into practice.

The Balancing Acts of a Transition Team

The United Church calls its members to be "in ministry together." This is particularly true of a Transition Team working with an Interim Minister. In this relationship there are balances the team and the minister must keep in mind:

- *between minister and congregation*
  The team will find that it lives in the tension between the Interim Minister, whose mandate is to effect change, and the many voices of the congregation, some of whom may resist change. A balance must be kept between listening to the congregation and supporting the work of the Interim Minister in providing leadership to move the congregation into new life. Keep in mind that, after the interim period is over, it will be the other Transition Team members, not the Interim Minister, who continue their life in the congregation.
- *between support and supervision*
  Another balance to maintain is between a Transition Team's supervisory role and its support role in relationship to the Interim Minister. The team is the body that collaborates with and supports the minister; it is also responsible for planning and carrying out the final evaluation of the minister's work. It is therefore important that, from the start, the team and the Interim Minister establish a relationship based on sound professional ethics and mutual respect.
- *between interim tasks and team maintenance*
  At the beginning of an Interim Ministry, it is easy to feel daunted by what seems like a great deal of work, and therefore to feel an urgency to get on with it. However, if team members are to maintain their energy for the full length of the interim, they must be able to support each other, especially when things seem not to be going well. A balance must be kept between the requirements to get the work done and the time it takes to maintain a trusting and supportive work climate.

The Pivotal Role of a Transition Team

The interim period can be as long as two years, and can have a profound effect on the future of the congregation. The role of the Transition Team is pivotal during this time. The church's official board (or equivalent) will rely on the team for information, understanding, and recommendations. The Interim Minister will look to it for support, insight, and assistance. The congregation will look to it for leadership that provides challenge, reassurance, encouragement to risk, and assistance in making the necessary changes for moving on in its ministry. After the interim period is over, Transition Team members will be called on to take leadership in other roles so that the new ways may be integrated into the ongoing work of the church.

Serving on the Transition Team will involve the members in the culture and dynamics of the congregation, with all of its strengths and faults. As members begin to discover what holds the congregation back from its potential, those very issues may become apparent in their own discussions. Building teamwork between the Transition Team members and the Interim Minister is like a "mini-experience" of the process the congregation must go through as it renews its ministry.

The minister and the other team members, by intentionally building a co-operative climate to accomplish their work, will themselves learn to change old patterns and try new things. Then, they can help other committees, the official board (or equivalent), and the congregation to do the same. The success of the team will lie in its members' ability to recognize issues that are negatively affecting congregational life and deal with them in its own functioning, and then lead the congregation to learn about those patterns and take appropriate actions to change them.

Continuity beyond the Interim Ministry

The congregational transformation that is initiated during Interim Ministry must be sustained into the ensuing ministry. There is often a tendency for the congregation to fall back into old habits at the conclusion of the interim period. Therefore it is vital that the principles and intentions of the Interim Ministry are well integrated by the congregation's key leaders, and that newly called ministers are well briefed and well advised as they take their places in the pastoral charge.

Transition Team Tasks

1. Prior to Arrival of the Interim Minister

- ❑ Establish a preliminary Transition Team structure, including two presbytery representatives, and elect a team representative to the church's official board (or equivalent).
- ❑ Dissolve any existing Joint Needs Assessment Committee.
- ❑ Write a position description for the Interim Minister.
- ❑ Recruit, interview, select, and recommend to presbytery an Interim Minister.
- ❑ Plan for the Interim Minister's arrival in co-operation with the Ministry and Personnel (M&P) Committee.
- ❑ Educate office and other staff about the incoming minister's responsibilities.
- ❑ Ensure that the Interim Minister is sufficiently briefed to enter into the life of the congregation quickly.
- ❑ On arrival, welcome and introduce the Interim Minister into the congregation.
- ❑ With presbytery, plan and assist with a covenanting service.

2. Team Building and Planning with the Interim Minister

- ❑ Clarify roles and work out the relationship between the Transition Team members and the Interim Minister.
- ❑ Agree on values in relation to each other, the work, and the congregation.
- ❑ Engage with the Interim Minister to refine preliminary goals and shape developmental tasks.
- ❑ Establish team norms, e.g., commitment, confidentiality, decision-making procedures.
- ❑ Establish relationships with other church bodies, especially the official board (or equivalent) and M&P Committee.
- ❑ Develop communication plans to keep the congregation informed and involved.
- ❑ Draft a long-term schedule, including times of evaluation and a tentative target date for the start of the Joint Needs Assessment Committee.
- ❑ Establish tentative meeting frequency and the first year's schedule.

3. Transition and Development Work

- ❑ Learn from and work with the Interim Minister to analyze systems and resistances.
- ❑ Assist the Interim Minister to work through developmental tasks with the congregation.
- ❑ Communicate progress on goals to the official board (or equivalent) and congregation.
- ❑ Work with the Interim Minister in documenting and reporting.
- ❑ Work with the Interim Minister in leading the congregation to embrace change.

4. Evaluation and Reporting

- ❑ With the Interim Minister, conduct reviews and report on the transition work.
- ❑ Conduct final evaluations of the Interim Ministry and of the Interim Minister.
- ❑ Write and submit final evaluation reports to presbytery.
- ❑ Submit recommendations to official board (or equivalent).

5. Disengagement and Closure

- ❑ Complete final documentation and report to the congregation.
- ❑ Celebrate new beginnings with the congregation.
- ❑ Facilitate farewells to the Interim Minister.
- ❑ Bring the Transition Team to a close, freeing members for other leadership positions.

Recruitment and Appointment

As soon as it is appointed, the first task for the Transition Team is to function as a search committee to help presbytery in the recruitment of an Interim Minister. The process is as follows:

1. Write a Position Description

A position description specifies the responsibilities of the Interim Minister to help the congregation accomplish the initial interim goals of the official board (or equivalent), and describes the extent of other expected pastoral duties. The position description also makes clear the qualifications and skills required of applicants, and lays out the terms that will be included in the formal Conditions of Appointment. (See appendix 4, Developing the Interim Minister's Position Description.)

The position description should emphasize that the primary responsibility of the Interim Minister is the work of congregational transformation. By stating the limits of the minister's involvement in the areas of Christian education, outreach, pastoral care, and so on, the document specifies that the Interim Minister will be doing a particular kind of work.

Creating a focused position description is of benefit throughout the interim period. It helps the Interim Minister resist inevitable pressures to accept other duties, and also gives the administrative staff and the official board (or equivalent) the authority to protect the minister's time. The position description also provides the criteria on which to base the final evaluation of the Interim Minister.

2. Recruit and Interview Potential Ministers

The presbytery will help in finding potential candidates for an Interim Ministry position. Lists of Interim Ministers are available from the Conference Interim Ministry Committee and the Human Resources Unit at the national level. Ministers not on the list who have suitable skills are eligible too, providing they agree to undertake training as a condition of accepting an appointment.

The Transition Team selects and interviews suitable candidates on the basis of the interim goals. Applicant ministers vary in the particular gifts they bring to interim work. For example, one candidate may handle conflict well, but not be as effective at visioning. Another could be good at analyzing situations, but not as effective in responding to grief. The Transition Team's task is to make sure, as much as possible, that the gifts of the minister they select fit the particular transition needs of the congregation.

In the interview, focus on the specific skills needed, and then frame questions that require the applicant to describe previous work experience that proves his or her capability. Ask the question "Explain how you handled…" rather than "How would you handle…?" to elicit descriptive information. If team members lack experience in interviewing, they should seek coaching so that they can find the best person for the congregation.

When the appropriate candidate has been selected, the normal appointment processes of the church are followed. It is presbytery that actually appoints the Interim Minister. Should a minister be selected who does not have the Interim Minister designation, the presbytery will forward a request to the Conference Interim Ministry Committee to interview the minister for initial designation. If the minister receives this initial designation, he or she will be required to participate in training workshops during the first year of the interim. The Transition Team must ensure that the minister is given time to participate in the required training.

3. Complete the Record of Appointment

The agreement between Interim Minister and pastoral charge is formalized in a document called the Record of Appointment. This document includes the responsibilities listed in the position description, the time and length of appointment, specifics of salary and other allowances, vacation and other leaves, and any other mutually agreed-upon conditions. It sets out grievance procedures and specifies the conditions under which the contract may be terminated. This document is formalized with the signatures of the Interim Minister, the chair of the official board (or equivalent), and the presbytery secretary. Completing this document is the final step in the appointment process.

4. Communicate the Limits of the Interim Minister's Role

Everyone in the congregation must be made aware that the Interim Minister is not fully available for all of the regular tasks of a pastoral minister so that the focus remains on the work of congregational transformation. Therefore, during the selection of the Interim Minister, the Transition Team must make sure that church staff, key volunteers, and members of the official board (or equivalent) understand the limits of the Interim Minister's responsibility.

The task of making arrangements to cover duties not included in the Interim Minister's position description falls to the church's official board (or equivalent) and the Ministry and Personnel Committee. Volunteers can be recruited to assume some responsibilities, for example, pastoral visiting, child and youth programming, and so on. As well, back-up ministerial staff should be identified who are able to provide coverage for critical pastoral needs, especially while the Interim Minister is settling in and getting oriented to the church and the congregation.

Administrative staff in some churches are able to help shield the minister from unnecessary intrusions. Especially during the first weeks, the administrator's understanding of the limits of the Interim Minister's pastoral activity will influence how well the minister is able to focus on interim work. The Ministry and Personnel Committee should be alerted and prepared to support the minister if help is needed in dealing with pressure from the congregation or committees.

5. Introduce and Welcome the Interim Minister

It is usually urgent for the interim work to begin, so a plan should be in place to introduce and brief the Interim Minister quickly and thoroughly. The Transition Team makes sure that recent minutes of the official board (or equivalent) and annual general meeting, the church calendar, statements of church policy, and any other relevant documents are on hand for the Interim Minister immediately upon arrival, if not before. While the Ministry and Personnel Committee may help the new minister physically settle into home and office, the Transition Team facilitates introductions to staff, the executive of the official board (or equivalent), lay leaders, and other key members of the congregation.

6. Participate in an Act of Covenant

The entry of the Interim Minister into the congregation's life is formalized in an Act of Covenant. With the assistance of the Transition Team and the Ministry and Personnel Committee, presbytery conducts the covenanting service.

7. Prepare the Transition Team for Work

The settling in of the Interim Minister will give the Transition Team a little time to pause and consider how well it is equipped for the work ahead. It may be that some of the members, for a variety of reasons, do not wish to continue. It is also possible that the team needs to add people with other skills or perspectives. The official board (or equivalent) must be involved if any changes in membership occur, and it will inform the congregation.

When all parties are in place, that is, the Interim Minister, the presbytery reps, and all the congregational members of the Transition Team, the real work of the interim period begins. At this early stage, the focus of the team and the Interim Minister must be to establish co-ministering teamwork, and then to establish a co-operative relationship with the official board (or equivalent) and other committees of the congregation.

Building the Team

Interim Ministers are specially trained to help congregations take the risks involved in transforming themselves. Interim Ministers know about change and transition processes; they know about congregations and how they can get stuck. They bring special techniques to assist a congregation to work through self-study. They also understand how individuals may react to the prospect of change, and can help them cope by offering spiritual guidance and providing pastoral care. Most importantly, Interim Ministers will anchor the transition process in the great biblical stories to help the congregation know that it is not alone in the bewilderment that often comes with change.

Congregational members of the team also bring special knowledge to the work of transition. They know the rhythms of the congregation's life—its customs, rituals, and practices as it moves through the church seasons. They have stories from the past that explain certain things in the present, and they know about those "sacred cows" that are bound to trigger reaction if prodded. The presbytery representatives on the team also play their part, bringing an outside perspective and a knowledge of church policy to the work.

The Interim Minister and the other team members play complementary roles. The minister is able to affirm and encourage inexperienced congregational representatives who may feel uncertain about what they must do. Team members can help the minister be aware of seemingly insignificant issues by explaining the political realities of the congregation, and also its fit within its presbytery. As they interact, the minister gains insight into the congregation, and other team members learn to see the congregation in a new way. As they learn from each other and collaborate, a synergy builds, and together they build an effect greater than the effect either could produce alone.

Clarifying Team Values and Mission

As well as understanding the technical requirements and procedures of the interim work, members of the Transition Team must learn what is expected of them personally in terms of time, energy, skill, and commitment. However, that knowledge alone will not be sufficient for them to play their pivotal role in the congregation's life. They must also establish a mutual understanding of and commitment to the principles and values by which the team will work together. They must feel that they can speak freely and honestly, and bring all points of view to bear on important issues, creating the climate that is essential for the discernment and decision-making that lies ahead.

An effective Transition Team is characterized by such qualities as

- a shared understanding by the minister and the other team members about their respective roles
- a shared concern for the health of the congregation
- general agreement with respect to the desired outcome of the transition work; e.g., what will constitute a "good and sufficient" outcome
- agreed-upon decision-making processes, and commitment to adhere to them
- dedication to regular spiritual reflection
- all-member participation and regular attendance

- ongoing attention to the group's working relationship through regular feedback
- commitment to work through conflict, and willingness to accept the consequences, whatever they may be
- assurance of confidentiality

This preparatory work must take place before the team begins to interact with the congregation. It takes time and requires intentional, focused work. A shared understanding of each other's roles, a common vision of the work to be done, and mutual commitment to support each other will provide a firm base for the team's work.

This team building is "retreat" work—to be done in time free from the expectation of following a formal agenda. It may or may not be time away, but it should be a good length of time and take place in a comfortable setting in order to facilitate prayerful focus, personal reflection, and informal but earnest group interaction.

When a climate of trust is established and values are explicit and shared, members of the Transition Team will develop a collective sense of what they expect for the interim work, that is, what they commit themselves to accomplish and in what manner. (See appendix 5, Setting Transition Team Norms and Values.)

Creating and Maintaining a Co-operative Team Climate

Occasionally, when the team building begins, some members complain that nothing is being accomplished and become impatient to "get on with" the interim tasks. However, team building *is* interim work: it forms the climate for the authentic reflection, co-operation, and action that will become an example to the congregation. The transition leaders must be clear and consistent in their collective purpose, especially when there is conflict in the congregation, because they will thereby demonstrate how people can resolve issues with good will.

The effectiveness of the transition process depends greatly on how well the minister and the other Transition Team members work together. Dissension or conflict between them will inevitably be reflected in the work. When the minister and team work as a cohesive and mutually supporting unit, a spiritual enlivening results that will permeate the whole congregation.

A Transition Team is not expected to show uniformity of opinion, but members must be able to find common ground despite differing points of view. (See especially Gilbert Rendle's *Behavioral Covenants in Congregations: A Handbook for Honoring Differences* (Alban, 1999).) Disagreement on issues can be healthy, encouraging a deeper level of discussion. However, an underlying conflict driven by different values may undermine any work the team undertakes. It is best to surface such conflicts early, name them for what they are, and allow those who hold irreconcilable views to withdraw from the team. Though difficult, identifying differences early and dealing with them openly will serve the team better than settling into compromise, only later to find the team has become immobilized by internal friction over some significant but divisive issue.

As the interim period progresses, maintaining the team can be as simple as routinely asking "How are we doing as a team?" whenever the team reviews a meeting or an intervention with the congregation, or considers whether the work is on schedule. Give members a chance to name their personal reactions, so that if anything is amiss it can be remedied.

Decision-Making

Any large group will likely have difficulty making decisions that work for everybody—formal rules of order notwithstanding! Because of unexamined expectations and habits that creep in over time, congregations can have even more difficulty. Often, the way decisions are made is one of the key factors causing a congregation to become conflicted and to lose trust.

Decisions that turn out to be ineffective happen in many ways: conflicting opinions leading to decisions where one side wins and the other loses; decisions being made by a group perceived as an "inner circle"; no consistency of decision-making between one situation and another; decisions asked for and made without sufficient information; decisions made without the involvement of the affected parties; lack of follow-through and monitoring; decisions reversed when someone gets upset—and other causes too numerous to mention!

Clearly, the Transition Team must take the lead to nudge the congregation out of ineffective habits, and so must learn how to make solid decisions within its own functioning. Team members should monitor themselves, asking each other, "To what extent do we commit ourselves to invite and consider each other's points of view, and work out our differences, before we make a decision?" Put a different way, "To what extent do we honour each other and listen for God's call as we invite the congregation to do the same?"

Decisions are usually made by voting or by using some variation of consensus building. The team should consider the pros and cons of each method; used appropriately, each has value.

Voting works best when the subject is not one of deeply held values. Voting is helpful for efficiently moving through the routine business of a meeting, or for deciding non-controversial matters. It is not effective for resolving matters that have triggered strongly held but opposing views that need thorough discussion. A vote means some win and some lose—not a firm basis for a group to move forward in harmony.

Consensus is a method that works best when the subject touches on deeply held values or raises complex issues. It provides the opportunity to explore the substance of an issue, and to resolve or at least ameliorate disagreements before a decision is taken. However, working by consensus takes time—sometimes a lot of time—and it requires that everyone be willing to commit to the process.

What Works

The Transition Team will likely be best served by using each decision-making method in its appropriate context. For simple procedural decisions, voting is efficient. On matters touching on values and faith, the consensus method will best facilitate the exchange of opinion and careful consideration needed.

Another possibility is to use consensus seeking to make the issue clear, but not necessarily to make the final decision. Used this way, the method can work to ensure that an issue is thoroughly discussed and considered, and that people feel heard and well informed before a final vote is called. However, the rules for doing this must be made clear and shared. (See appendix 6 for a Sample Decision-Making Agreement that uses consensus seeking.)

Whatever the choice, the rules of the method must be well understood by everyone, and team members must commit to following through with the method they have chosen, knowing they must live with the consequences of their choice. That means, if voting is used, some members must be prepared to live with their disappointment. If consensus seeking is favoured, all members must "hang in" for the time it takes to reach the decision.

The Transition Team is accountable for its decisions; therefore, its work must be appropriately documented. Make sure all decisions are properly recorded in meeting minutes.

Confidentiality and Transparency

The Transition Team must build a relationship of trust with the congregation. Four words need to be distinguished: *privacy, confidentiality, secrecy,* and *transparency*. With the exception of secrecy, each has its place in the interim process.

Privacy is defined as belonging to one individual only. Most people are aware of the importance of respecting the right to privacy, that is, of honouring an individual's control over how and with whom personal information can be shared. This right is protected by Canadian law in the *Personal Information and Electronic Documents Act* (PIPEDA). The implication for the Transition Team is that if the names of private persons are to be used in documentation or public display, each individual so named must have given prior permission.

Confidentiality means ensuring that information gained in private discussion is not disclosed to others inappropriately, and that information gained from private conversation is not used out of context. It is a condition of withholding some information to support the integrity of a process and the trust between those charged with responsibility for it. Confidentiality is a required condition for participants of certain groups to ensure that what is said in the group stays in the group. This enables people to speak freely about private or controversial issues without being held to account beyond the group where the words are spoken.

Secrecy is the condition of withholding information for the purposes of control. It is a situation in which only a few initiates are privy to certain information and everyone else is excluded, whether or not the information could potentially affect them. When people, rightly or wrongly, suspect that something is being done beyond their knowledge, they will be suspicious that a few "insiders" are making decisions for others, and mistrust can take hold.

Transparency is the opposite of secrecy. It is the condition of seeing into something clearly. Transparency does not mean that private matters are open to public view, but that methods and procedures are open and can be questioned. It operates on the democratic principle that people have a right to know about the systems that affect their well-being. Transparency means that people will know and have a say in how information will be used, who will see it, and how it fits into the larger picture. It supports the principle of keeping a congregation well informed about the transition work.

Secrecy and confidentiality can be confused in the minds of some when they feel that something is going on that has the potential to upset or harm them. If people feel anxious, they may view the team's work with suspicion. However, some matters that are discussed must be kept within the team. Consequently, it is very important that the team, while maintaining appropriate confidentiality, communicates its intentions and processes clearly and conducts its work transparently.

What Works
Part of the Transition Team's overall strategy for the interim period must be to keep everyone fully informed about the interim work. By making the intent and progress of its work clear to everyone who will be affected by its outcomes, the Transition Team ensures that the congregation has enough information to know what is taking place and why. For example, while honouring the confidentiality of its own meetings and private conversations, the team can share its values and mission, its decision-making processes, its timelines, and its purposes for doing things a certain way. Even while ensuring confidentiality, it can still document and disclose the results of research or surveys.

Since they will be dealing with sensitive and controversial issues, team members must individually commit to confidentiality. This means that the chair, or another designated person in his or her place, is the team's single public voice, the Interim Minister's commitment to the congregation notwithstanding. Unless agreed otherwise for certain purposes, other members must commit themselves to making only general and positive comments about the team and its work.

Team Building as Experiential Learning

The Transition Team members set out on a path of exploration about the meaning of their church well ahead of the congregation. As controversial issues come up and favourite assumptions are challenged, members may feel uncomfortable and anxious. As they explore these feelings, they will experience first-hand the emotional impact that change can have. Likely, many members will find this kind of personal confrontation challenging; some may find it discouraging or even frightening. At such times, it is important that team members take the time to share and to help each other find reassurance and regain hope.

A definite benefit to the transition work will result when team members experience and share their personal reactions during these emotional times. When team members live this experience and observe what happens as they share their fears and hopes while continuing to seek common purpose, they will see how doing so deepens the level of trust in the group and increases everyone's commitment. If they examine what hinders and what helps them in their own experience, they will have a better understanding of how to help people in the congregation through the transition processes.

Leading a congregation through Interim Ministry is a great challenge, but also a rewarding spiritual journey that requires dedication and faith. The results of the work will be felt in the congregation long beyond the Interim Ministry period.

Setting the Plan

Redefine the Initial Interim Goals

In undertaking Interim Ministry, the official board (or equivalent), with the help of presbytery, will have set initial goals. These initial goals, which name some troublesome issues that the congregation must address, are probably stated in broad terms. The Transition Team must reshape these broad goals into specific, practical objectives for a common understanding of the work ahead.

For example, an initial goal for the interim might be "to bring unity to the congregation by resolving longstanding conflicts." The Transition Team will have to identify what conflicts exist before addressing the broader question of unity, and clarify the meaning of "congregational unity." Is "congregational unity" a question of theology, internal politics, or the use of the kitchen? When the specific issue is defined, a suitable strategy and an appropriate amount of time can be assigned to deal with it.

One of the most important things the Transition Team must do is determine how it will know if its goals have been reached, i.e., what achievements will indicate satisfactory outcomes. The question is not just, "What exactly do we intend to do?" but rather, "What indicators will tell us how well we've done it?" The specific outcomes will be the baseline for evaluating the Interim Ministry at the end of the interim period, and will guide the congregation into its future.

It is the role of the Transition Team to make a list of the possible achievements for each goal. These can be either quantitative—such as congregational numbers, donation amounts, and workshops offered to the community—or qualitative—members' stories, historical records, or before-and-after photographs. Each type of data illustrates different aspects of the congregation's development. Other goals may also emerge as the Interim Ministry proceeds. These too need to be included in the evaluation process; it is important, therefore, to document such information accurately at every stage for future reference.

An additional caution: beware of mistaking solutions for goals. For example, when asked, "What does this congregation need to do?" people often answer with "bring in more members," "have more lively music," or "bring in more young families." These are not goals, but facile solutions. The work is first to identify the underlying causes behind the apparent lacks, and then to formulate the processes needed for the congregation to transform itself into a church filled with grace and Spirit. The interim goals must foster the congregation's becoming a place where these surface problems diminish or even disappear.

What works

To clarify the interim goals, the team might use questions such as these:

- What is this issue really about, and how does it show itself?
- Is there a primary place where this issue originates? How widespread is it?
- Whom does this issue affect, and how?
- Who must be included when seeking solutions?
- What will be different in the congregation's life if this goal is met?

Clarifying goals will be an ongoing process as the work progresses. Issues will continue to emerge that relate to the original, overarching goals of the interim, and what may seem at first to be a priority may turn out to be not so important later on. Also, as one presenting problem is discussed, the team may find that similar patterns become apparent in other, seemingly unrelated situations, and that its focus must shift. Still, no matter what detours beckon, it is important that the team not get lost in the minutiae of goals within goals. The overall purposes for the interim period must guide the team.

It should also be remembered that not everything that emerges can be resolved by the Interim Ministry itself. Change takes time, especially in an institution like the church that holds such personally significant experiences for people. Two years is really a very short time in the life of a congregation. The work of transformation must become an ongoing part of church life—something built into the very fabric of its ministry.

The Transition Team should keep its focus on helping the congregation develop an objective, witnessing view of its life that facilitates identifying unhelpful habits and practices and replacing them with healthier, more life-giving ones. The team should focus on helping the congregation understand how it limits its vision and practices, and then support the process of transforming what is limiting and short-sighted into something broader and more functional.

Manage Time

Interim Ministry is time-limited. No sooner is everything in place than team members and the minister find themselves working against deadlines. For most Transition Teams, time passes all too quickly.

A tentative timeline should be created as early in the process as possible in order to guide how the interim work will unfold. The plan must fit into the regular life of the congregation, and take into account factors such as the rhythm of congregational life (e.g., periods of low attendance, sacred seasons and observances, the minister's holidays) and the amount of time the Interim Minister must give to the usual responsibilities of being minister.

Other factors that affect scheduling arise out of the interim work, such as

- the phases of the transition process—some steps must come before others
- the appropriate time to appoint a Joint Needs Assessment Committee, which must fit within the church's normal pastoral relations process
- the need to complete the final evaluations of the Interim Ministry and of the Interim Minister three months before the Interim Ministry ends

Of course, unexpected issues will arise and must always be dealt with. However, having an overall view of the interim schedule will provide a reference for helping the team keep the work on target. For more detail, see appendix 7, Creating a Visual Timeline.

Set the Schedule for Meetings

When everyone is clear about working principles and values and the interim schedule is charted, team members will soon realize that they must meet often and over a long period. A quorum for a meeting of the Transition Team must include the Interim Minister, at least one presbytery representative, and at least three congregational members.

Factors affecting the ongoing frequency of meetings are the size of the congregation, the team's relationship with the Interim Minister, and team members' individual schedules. Despite these complications, the determining factors for meeting frequency should be the breadth and depth of the transition work to be done and the readiness of the congregation to move with it.

The intense work of team building and planning at the beginning of the interim will require extra time—a team may choose some retreat times or more frequent meetings to make sure this initial work is done effectively. After the initial period, meetings of the team might take place once a month, with sub-committee or work group meetings between times. However, it is not uncommon for a Transition Team to meet every two weeks for most of two years.

Finally, so that everyone gives priority to the interim work in his or her personal schedule, it is helpful to schedule meeting times season-by-season rather than meeting-by-meeting.

Build Relationships

With the official board (or equivalent): A member of the Transition Team—probably the chair—becomes a regular member of the church's official board (or equivalent) and reports to it regularly. The Interim Minister also meetings of the official board (or equivalent). However, much more than just reporting is necessary. It is important that members of the official board (or equivalent) understand and are fully involved in the interim work as it progresses; their support and participation help the congregation trust what is happening.

To accomplish this, the Transition Team can involve the official board (or equivalent) in its self-study practices so that its members are comfortable with and knowledgeable about the transition work. The official board (or equivalent) could then collaborate in taking issues to the congregation, and help ensure that the initiatives of the transition take hold in the life of the congregation. Above all, there must be no surprises for this key body in congregational life!

With the Ministry and Personnel Committee: An effective Ministry and Personnel Committee is key to maintaining the health of future pastoral relationships, but how well this committee functions varies from congregation to congregation. When working well, it may be a resource for the team, offering assistance in writing position descriptions, in planning effective reviews and evaluations, and perhaps in managing conflict. On the other hand, if the Ministry and Personnel Committee is functioning poorly, improving it during the interim period must be a primary concern.

The team can help Ministry and Personnel Committee members understand their responsibilities by encouraging attendance at training sessions (ask the presbytery to create training if none is available). The team can encourage the addition of new Ministry and Personnel Committee members. Continuity can be assured if someone from the Transition Team joins the Ministry and Personnel Committee member when the Interim Ministry ends.

Throughout the interim period, the provision of private, personal support to the Interim Minister remains the responsibility of the Ministry and Personnel Committee. It is important that the confidentiality of that relationship is honoured.

Within the congregation: The Transition Team's work will be more effective if it works collaboratively with key committees and other church groups. The better these groups know the interim plan, the better they will be able to co-operate to further the interim objectives.

Encouraging the Congregation to Participate

The Transition Team as Facilitator and Teacher

Members of the congregation must fully recognize the interim work as their own. Any perception that the Interim Minister, the presbytery, or the Transition Team has controlled or forced change will scuttle the whole project. If a congregation was reluctant to enter Interim Ministry in the first place, the Transition Team will have to pay special attention. Even a congregation that willingly chose the Interim Ministry may react negatively if there is a perception that change is being forced on it.

The goal is for the congregation to gain the confidence that it can make choices for its ministry and then intentionally follow through on what has been decided. The needed attitudes and skills for doing so are best learned when they are experienced and practised. Understood from this perspective, the role of the Transition Team is not to identify problems and fix them, but instead to be a catalyst, facilitator, and teacher, helping the community learn new ways of being.

Relieve Anxiety

One of the strengths of a congregation as it moves into Interim Ministry is its longing for something that seems somehow reachable but also beyond reach. This longing may have an edge of worry to it, but some anxiety during this time is normal and even desirable, for experimentation does not usually spring from complacency. The stories of our faith show us that life springs anew beyond difficult times

However, too much anxiety can stand in the way of change. Fearful people are more likely to feel unsettled, confused, and reluctant to give up safe, familiar ways. The anticipation of loss can also cause people to cling persistently to what is familiar, or alternatively, to leap to ideas of a brave new world without adequate thought as to how to get there.

To make room for new initiatives, the Transition Team can support people in the congregation in accepting their losses and acknowledging their fears. Simple reassurance or explanation will not be enough. It is always tempting to think that if the need is obvious enough and something new is explained well enough, people will make the necessary adaptations. But what helps more is creating the kind of community where people find it safe to speak of their hopes and fears, and to live the experience of knowing that they are not alone. Only then will they be able to reach beyond their fears and welcome new possibilities.

Such work is demanding, but it may be the most important work the team does, for it is at this soul level that people gain the trust that makes it safe to try new things. Fortunately, there are many resources to help. The Interim Minister's knowledge, skills, and pastoral approach will lead the way. Spiritual reflection, especially using the great wilderness and trial stories from the Christian tradition, will help everyone hear the call of their faith and help them risk change.

Recognize and Deal With Resistance

In its mandate to bring about change, a Transition Team has considerable power and its actions, even if exercised with the greatest care, may antagonize some people. Also, the team will likely surface some unpopular issues, for example, by calling hidden agendas out of the closet or opening old wounds. Even the most sensitive handling of such issues will not avoid some opposition.

People show resistance in different ways. One is to scapegoat—to blame someone or something in order to divert attention away from the real pain—and both the Transition Team and the minister may find themselves the targets. Other types of resistance are shown when influential people in the congregation simply fade into the background for the duration of the interim period, only to re-emerge and reassert their opinions after it ends, or when a former minister or patriarch or matriarch of the congregation uses old alliances to undermine the credibility of the Transition Team. Though they no longer hold formal leadership positions, these folks may still wield considerable influence.

Transition Team members need to be alert to evidence of resistance, identify the perpetrators, and address the causes. Notice who does not participate in the interim discussions or meetings. Be aware of rumours and take note of parking lot conversations. Watch for subtle or not-so-subtle attempts to divide members of the Transition Team or to influence team members against the Interim Minister.

The Transition Team can use different approaches to deal with people who would undermine the congregation's work. It may be possible to engage the individuals directly to try to gain their understanding and support. On the other hand, it may be necessary to develop strategies to defuse their opposition or neutralize their influence. Presbytery can be called to help when an ex-clergy person appears to be working against the team. Whatever the case, the team must do its work in ways that are transparent, invitational, and energizing. Frequent and clear communication to the whole congregation about the transition work can do much to offset the power of resistance.

Dealing with and clearing resistance when it occurs releases energy for growth, but such work is difficult and may create anxiety in the team itself. Openly discussing frustrations helps keep alive the trust members have developed with each other. Pausing for prayer helps keep everyone centred spiritually. Taking time to keep the team healthy is vital to the team's ability to convey messages of hope and renewal to the congregation. The congregation will quickly sense the team's energetic tone, whether positive or negative. In the final analysis, it will be the Transition Team's faithful caring and encouragement that will keep Spirit moving in the congregation.

Communicate, Communicate, Communicate

The Team's Perspective

As Transition Team members involve themselves in questioning and probing, they learn whole new ways of seeing the church and will look to the future from that changed perspective. The larger congregation, not having had the same experience, may remain static in their views and therefore be unlikely to understand the team's newfound insights. Unless deliberate action is taken to avoid the situation, everyone outside of the Transition Team—members of the official board (or equivalent), trustees, committee members, and members and adherents of the congregation—will simply not be ready to hear and integrate what the Transition Team proposes or why things have to change.

The Congregation's Needs

Adults bring a rich background of life experience to every new situation, and they have particular needs when it comes to learning something new. To make sense of new concepts, especially if they are expected to change their ways of doing things, adults need opportunities to talk about how they see things and make sense of why change is needed. They likely need any new information to be presented in concrete ways that fit their experience, and they may need to hear it more than once. They also need to talk about it. Open discussion gives them a chance to see how the "new" fits with what they already know, and how it can benefit them.

Attention must also be paid to ensuring that children, teens, and young adults are included in the discussions about the congregation and its future. However, having one young representative on an adult committee is not an effective way to involve these age groups! Facilitated and age-appropriate discussions in peer groups can be one way to tap into the concerns and ideas among young people. Using electronic communications media is another.

The congregation may have a large population of senior adults, many perhaps with long personal and family histories in the church. Changing the way the congregation does things may be a particularly sensitive issue for them, for it may be experienced as one more loss, and a very precious one, just at the time in their lives when the support the congregation provides is needed most. There is much wisdom among this group, but unfortunately, it is often expressed as resistance. For these folks, good pastoral care that intentionally provides opportunities to grieve can help them be open to new possibilities.

What works

In their book *Holy Conversations,* Gil Rendle and Alice Mann explain how a planning team and a congregation can end up with very different views and how vital it is for the team to communicate clearly and frequently. Rendle suggests that a planning team should work out loud, communicating continuously about its planning, insights, and dilemmas as it goes.

In most congregations, there are many communication possibilities: Sunday bulletins; bulletin boards, newsletters; websites; specially issued discussion papers; meetings of existing groups or committees; and special congregational forums. Each of these has potentials and drawbacks, so the team must decide which is appropriate for the particular message being delivered.

In this context, Marshall McLuhan's famous line "The medium is the message" is relevant. The way the message is conveyed is just as important as—perhaps even more important than—its content. The way to make information most accessible is in meetings, group sessions, or congregational gatherings. These forums provide the greatest possibility for open, two-way communication.

At the beginning of the interim period when the team begins to hold meetings with the congregation, people need to get the message that the Transition Team is working in their interests. The congregation will be curious, but also somewhat apprehensive. Even though these initial meetings may not be the most productive, the team's primary focus should be on allaying fears of the unfamiliar and establishing trust. The team should listen and collect information, reacting only with excitement about people's participation!

When an initial intervention goes well, the team benefits by learning directly how people feel and think about their church, and also by having set a positive precedent. The congregation benefits by experiencing discussion in a safe and positive environment, and knowing that the Transition Team is truly interested in what they have to say. (See appendix 9, Initial Small Group Conversations.)

Whenever the team interacts with people in groups, its task is to present its message and then to listen, ask for questions, and support general discussion, rather than trying to persuade or convince. There is some risk involved in holding such open-ended discussions. What if it becomes evident that the team has not accounted for all the variables? What if there is an entirely different way of looking at the situation? What if there is confrontation or no agreement? None of these possibilities can be avoided if the conversation is to be truly open-ended. On the other hand, being able to interact helps people become interested, curious, and truly engaged. Team leaders may be challenged, but they may also hear ideas that they had not considered and suggestions that help move the congregation along.

It takes some courage to lead a group in an open-ended discussion. This is when learnings from the initial team-building experience can help team members understand what people in the congregation are experiencing and what they need to do to come to a consensus. Team members will know that, despite obstacles, thorough discussion can focus attention on the real issues, reduce resistance, and bring people to a better understanding. They will be able to support differences and facilitate working them through, knowing that an open and honest exchange of viewpoints will help members of the congregation find common ground.

Gathering Information

Choose Appropriate Methods

When it comes to collecting information from people in congregations, different methods have different strengths. Pencil and paper surveys are one popular method. But it is difficult to construct surveys that will provide accurate information, and they are seldom returned by more than a third of those to whom they are sent. Large group meetings are a good approach for people who are confident about speaking out in front of others. For people who are less vocal in public, a carefully planned and facilitated series of small group meetings may produce better results. Taking these variables into consideration, the Transition Team should try to use a variety of methods to collect information.

When the Transition Team proposes to hold group meetings to communicate directly with the congregation, the challenge in planning such meetings is three-fold:

- to make sure its own message is clear and relevant to people's experience
- to facilitate maximum interaction
- to ensure that the discussion is properly documented, so that the main themes of the discussion are retained

See appendix 9, Planning Small Group Meetings, and appendix 10, Planning Effective Congregational Meetings.

Plan Group Meetings with Care

The following list of tips may be used for planning an interactive program and as a checklist to evaluate whether an intervention accomplished what was intended:

- ❑ Know what you want people to understand and say it clearly.
- ❑ Deliver your message in small bites, with intervals between for discussion.
- ❑ Plan to engage people in as many ways as possible—hearing, seeing, speaking, doing…
- ❑ Give your message in language that people are comfortable with.
- ❑ Say what you have to say, explain it, then say it again.
- ❑ Give people time to talk informally with each other (you don't have to hear it all!).
- ❑ Encourage the expression of contrary opinions.
- ❑ Sum up what you have heard.
- ❑ Restate your message, integrating what you've heard.
- ❑ Summarize what the process has been, what has been agreed upon, and what doesn't fit.
- ❑ Describe what happens as follow-up and what it means for ongoing action.

Ask Useful Questions

Whatever method is used to hear from the congregation, it is important to ask questions that yield useful information. (See appendix 11, Soliciting Information and Feedback.) Be sure that people in the target group have direct knowledge of what is being asked. For example, a group of elderly members who have little knowledge of the Christian education curriculum or the children's program will be unlikely to provide valid data on the subject of the church school.

Construct questions that ask for personal *experience*, not for generalized opinions or judgments. Avoid questions that merely ask for likes or dislikes. For example, the statement "In a worship service, describe the parts you find uplifting," followed by a second request, "Is there anything else that would help you maintain your spiritual focus during worship?" would elicit quite different, and more useful responses than "What do like about the worship services?" (As a test, ask members of the team to answer each of these questions, and notice the difference in the quality of their responses.)

Document the Discussion

Make sure that the information gained from a gathering or meeting is documented and given back in a timely way to the group that produced it. This means that the results of whatever dialogue has taken place are recorded, summarized, and made public, so that everyone knows that they have been heard and that what has been said is on record.

Summaries can be reported by means of an article in the bulletin or newsletter, as a "white paper," or as part of a larger document. It is important, however, to make sure that those who participated see, as soon as possible after the discussion has taken place, that their input is valued and has been accurately recorded.

Identify the Real Issues

When the team reviews what the congregation has said about the church, it will probably discover a constellation of issues, for example, about how worship is handled, about declining membership, or about how decisions get made. The first impulse is to take this information as an indication of what to "fix." However, these obvious situations may be simply symptoms of an underlying malaise or block. The team's task is to probe for the key issues that underlie these surface difficulties.

The power of the Transition Team lies in its potential to cut through surface issues and seek the heart of the problem. Each person on the team must be willing to listen curiously, see patterns, and dig beneath the obvious. Take time for personal reflection and for personal and collective prayer. Be open to being mistaken. The result can be a surprising discovery—finding something together that no one alone could have named.

Discernment of this sort requires patience and commitment. It pays off in a sudden "aha!" moment and the kind of relief that comes when a truth has been named, even though that truth may be painful. If congregation members have opportunities to come to their own realizations, these moments will open a sense of Spirit moving among the people. The process and the truth that emerges are wonderful gifts.

Choose What to Respond To

In a stuck congregation, the Transition Team may discover certain issues that are blocking change. It is sometimes helpful to free up energy by dealing with a block, but only if the problem is really as simple as it appears. Differentiate the work that the team can reasonably and directly do from work that must involve the congregation, which will take more time and must include more people.

The team's focus must remain on facilitating change within the congregation. It takes time for a large group of people to come to a common understanding of the issues at hand. Solutions to underlying issues may come slowly, perhaps not until the interim period is formally over. If quick-fix solutions are avoided and the underlying problems are well understood, congregational transformation will become an ongoing process as people become accustomed to dealing with issues and resolving them as they occur.

Reviews

The Purpose of Reviews

There are differences between a review and an evaluation. An evaluation is meant to judge the effectiveness of a piece of work. A review, on the other hand, provides an opportunity to check a work in progress so that strengths and weaknesses can be identified and adjustments can be made in order to meet a project's goals.

The overall effectiveness of the interim period will be evaluated at the end of the period, when both the Interim Ministry itself and the work of the Interim Minister will be assessed. However, reviews of the interim work can take place at any time, and regular reviews help keep everyone on track.

Using Reviews

A review (sometimes called a debriefing) can be used at any time when a number of people were involved in an event and a particular outcome was anticipated. This could be at the end of a meeting, after a workshop, or after a formal presentation. A review is essentially a planning tool; insights gained in a review can help to make a subsequent activity more productive.

The team should take the time to assess how the work is going overall, how people feel about it, and what may be happening as a result. Reviews may also help keep the official board (or equivalent) and the congregation involved in the interim work. They are good tools for learning about what helps and what hinders when dealing with contentious issues and moving through change. Reviews can yield unexpected insights and reveal any need for adjustment of the original plans.

To conduct such a review is simply to ask, "To what extent were our goals for the event met? What helped? What hindered? What would we do differently next time?" Ensure that everyone involved (or at least a representative sample) has the opportunity to respond to each of the questions. (See appendix 12, Tips for Effective Reviews.)

About halfway through the interim period, presbytery may require a Mid-Term Review. This is an opportunity to step back and assess how far along the congregation has moved in meeting its goals for the interim period, and how well the work of the Transition Team is progressing. (See appendix 13, The Mid-Term Review.)

It is also important for the Transition Team to regularly check its own functioning, and make sure the team is following its values. The team should ask each other, "How are we doing as a team? How satisfied are each of us with the work we are doing? Are we on track in our relationship with the congregation? What have we learned that we can use to make the next steps work better? Is our energy holding up or should we step back and renew it?"

When reviews become familiar, they need not take much time, but they become a very useful tool for checking the team's process. It may become apparent that the work is not proceeding as well as it could. Or that an issue felt in the team may be the very issue that needs to be addressed with the congregation.

Timing for a Joint Needs Assessment Committee

About halfway through the Interim Ministry (early in the second year of a two-year interim period), one of the areas the Transition Team reviews is whether the congregation has clearly identified its future mission, so that the next steps in the transition process can be undertaken. If the congregation is deemed ready, the Transition Team may inform the official board (or equivalent) and the Presbytery Pastoral Relations Committee that it is time to form a Joint Needs Assessment Committee (JNAC).

The task of the JNAC is to describe what the congregation requires of new ministry personnel. During an Interim Ministry, the JNAC cannot be appointed until the Transition Team judges that the congregation has a clear sense of its future mission. Upon the recommendation of the Transition Team and the request of the official board (or equivalent), the presbytery gives permission for the JNAC to begin. The official board (or equivalent) appoints JNAC members and presents them to the congregation for approval. The JNAC should include one or two members of the Transition Team in order to ensure continuity of vision. The presbytery appoints its members to the JNAC and calls the first meeting of that committee.

It is to everyone's advantage if the search for new ministry personnel proceeds in a timely way, in keeping with the customary church cycle for changes in pastoral relations. The Transition Team must also keep in mind the time needed for both the JNAC, and the Joint Search Committee that follows it, to do their work. The team may have to resist pressure from those who are impatient to get on with the search for a new minister, but the JNAC should not be appointed until the Transition Team is satisfied that the mission is sufficiently clarified. Fortunately, when the JNAC is formed, much of its work will have already been done by the Transition Team, and the JNAC process should be fairly brief.

Transition Tasks

1. Celebrate History: Recall Who We've Been

As people in a congregation come and go, full recall of the community's accomplishments, challenges, and celebrations can fade. The first phase of the self-study seeks to recall and celebrate the history of the congregation.

This may be the first intervention the Transition Team and Interim Minister make directly with the congregation, and it is important that it be lively and interesting so people want to come back for more. Create a playful, celebratory mood. A decade-by-decade timeline, for example, will bring people together to share recollections and celebrate their past.

History taking will likely reveal some useful insights. It will show how much the congregation has changed and how it has adapted to previous times of difficulty. The team can highlight these insights and use them at "teachable moments" throughout the interim period to remind the congregation to have confidence in its unfolding process as God's church.

What works

Start by searching out the bare bones of the congregation's life in its archives. Look for important dates, size variations, major building alterations, changes in the structure of the official board (or equivalent), significant celebrations, and so on. Using this archival framework as a basis, invite congregation members to flesh out the story by recalling their own lived experience.

Sharing recollections of church history is usually fun because there are always fond memories—individual as well as communal. Give people sufficient time to enjoy telling their stories. Transition Team members can share in the fun, and also learn a lot about the congregation by being curious and asking questions.

To make the members of the official board (or equivalent) aware of why history taking is important, it might be helpful to do a "dry run" with them before doing it with the congregation. Then, if appropriate, invite members the official board (or equivalent) to facilitate and/or document the congregation's responses.

After the history taking, the team's task is to share the results with the congregation, so that everyone knows the church history as they take the next step—describing how the church is known currently.

2. Establish Identity: Name Who We Are Now

Each United Church has its own unique characteristics—a particular flavour or "ethos" that comes from the complex external and historical factors that have shaped it. Its geographic location, community, and neighbourhood, even its physical building are part of its identity. The size of the congregation, its key personalities, age cohorts, economic status, and levels of education all factor into what the congregation feels itself to be and how it is perceived within its larger community.

However, each person experiences life in the congregation differently and would describe it differently. Think of how each family member would describe your own family! Finding a common definition of "who we are now" is a matter of finding commonalities among the many singular perceptions.

Many of the obvious characteristics of identity will have emerged from the congregational history taking—its age, size, what it celebrates, and so on. The Transition Team's role in this second task is to help people in a congregation go deeper and name those intangible, felt elements that reveal who they believe themselves to be.

What works

Getting a reading on these less definable aspects of identity will require some outside-the-box planning! Try to engage the congregation imaginatively rather than analytically. Use visual aids or metaphor.

A useful approach to naming identity can be found in Janet Cawley's book *Who Is Our Church? Imagining Congregational Identity* (Alban Institute, 2006). Cawley suggests asking the congregation to describe itself as a person with identifiable traits. The Interim Minister will also have suggestions.

If a suggestion seems a little "off the wall," a practice run within the team will help everyone feel comfortable enough to take it to the congregation. Remember also to orient members of the official board (or equivalent) to the exercise prior to taking it to the congregation.

Establishing its identity—who it is now—is an important accomplishment for the congregation. The insights gained in this exercise become the base on which the congregation will name its mission.

3. Choose Mission: Decide Who We Want to Be

A church's mission is found in its response to the questions "What is the content of your faith?" and "What is the function of your church?" Mission is the focus and total range of a congregation's activities, an umbrella statement of what characterizes it as the body of Christ.

Important and enduring values of the congregation will have become apparent in the history taking and identity naming. With this greater understanding, the congregation can be invited to form its response to present challenges and future call to ministry and mission.

Helping the congregation understand and name its mission is the culmination of the Transition Team's work. Drawing on all that it has discovered and learned, the team must support the congregation and help it to understand necessary changes, claim the new mission, and develop the leadership to support it. When the Transition Team judges that the congregation really "owns" its new mission, and if new ministry personnel are required, the team recommends the appointment of a Joint Needs Assessment Committee. The Transition Team itself is then free to shift its focus to making sure the structure and leadership of the congregation is developed so that the new mission is carried through.

What works

In planning the process of choosing mission, the Transition Team must be sensitive to the congregation's readiness, supporting it with sufficient information and inspiring it with the spiritual confidence to make the decision. All relevant information must be available so that people know their choices and understand the implications of their decisions.

Some beginning sense of mission may have already emerged as a product of the self-study that has taken place. On the other hand, a congregation may need to see alternatives from which it can choose. A vibrant sense of call results only when people have been engaged with each other in the act of choosing—not just accepting—the path for their collective life. This is especially true if the congregation must close. Transition leaders must beware of simply holding up a pre-chosen statement of mission for tacit agreement.

If new ministry personnel are required, the team can anticipate that there may be hesitation to make the "mission decision" before a new minister is called. The team must help people understand that a potential minister will be most interested when a congregation has a strong and clearly stated sense of its own call and purpose.

4. Renew Structures and Leadership

Review Systems

Much will shift in the life of the congregation during a period of Interim Ministry. The interventions that have encouraged self-reflection will make subtle differences. Habitual ways of doing things may come under question. Confidence will grow with the knowledge that congregational life, even though it may have been troubled, still adds meaning to the lives of many people.

Nevertheless, as it guides the congregation, the Transition Team is likely to discover organizational structures and systems that are not working well or are serving only to maintain outmoded ways of doing things. The team must do what it can to open these systems and to encourage updating the administration as well as the mission of the church.

Some changes in these areas will be welcomed and embraced by the congregation because they are recognized as making things work more smoothly. Other innovations, however, especially in areas that certain people hold near and dear, will progress more slowly and not necessarily within the term of the Interim Ministry.

Empower New Leadership

The Transition Team must plan how to ensure that the renewal becomes ongoing, even after the Interim Ministry, as the congregation puts what it has learned into practice. One way to do this is to encourage new leadership from the pool of people who have become excited by the possibilities that have emerged. Part of the team's work is to notice and welcome these emerging leaders and create appropriate opportunities for them to move into the life of the congregation. Find ways for them to learn how "church" works. Link them with others who will welcome and nurture their interest. Make sure their spiritual needs are responded to. Above all, see that appreciation is given for their presence and participation.

Ensure Continuity of Interim Initiatives

The congregation's embrace of its new ministry will need continuing reinforcement and support once the Interim Ministry period is formally concluded. Challenges to what has been accomplished can be expected, either because of a tendency to revert to old habits or because some folks who opposed the findings of the interim period may now step forward to actively undermine the congregation's work.

To ensure that the new mission is incorporated into the needs assessment and search processes, one or two members of the Transition Team should serve on the Joint Needs Assessment Committee and on the Joint Search Committee. Their purpose is to help these two committees honour the mission that evolved during the interim period, and integrate its principles into the committees' tasks. The same may be necessary for the Ministry and Personnel Committee, so that it will understand the new congregational context in supporting the new minister.

As well, before stepping down from its mandate, the Transition Team should encourage and assist the church's official board (or equivalent) to consider means of helping the newly called or appointed ministry personnel carry forward the congregation's transformation.

Renew Links with the Wider Church

A troubled congregation may have become so focused on its internal difficulties that it has forgotten its place within the wider body of the United Church. Or it may think that the presbytery, either by neglect or design, has been responsible for the bad things that have happened in its life.

The interim period is a time to re-root the congregation in its larger church community. Make sure that the positive influence of presbytery representatives during the interim period is made clear. Help the official board (or equivalent) and congregation renew links with presbytery and Conference and bring attention to the work of General Council. The goal is to help the congregation see its place within the great faith community that is The United Church of Canada.

Evaluation, Reporting, and Closure

Scope and Purpose of the Final Evaluations

To fulfill its mandate to oversee the work of the Interim Ministry, presbytery is responsible for the evaluation of the Interim Ministry, including the work of the Interim Minister. This role is accomplished through its representatives on the Transition Team. The team, according to the *Interim Ministry Handbook*, must ensure a clearly defined process of support, accountability, and evaluation for the Interim Minister. Thus, in practice, the final evaluations are planned and carried out by the Transition Team (including the Interim Minister, when appropriate), and engage the Ministry and Personnel Committee, the official board (or equivalent), and the whole congregation. The evaluations must be completed 90 days before the end of the Interim Ministry and forwarded to the Presbytery Pastoral Relations Committee.

For the Transition Team and the congregation, the evaluations of the ministry and of the minister are an opportunity to assess how much progress has been made on each of the goals, to affirm accomplishments and learnings, and to note areas that need to be strengthened or completed. The evaluations signal the beginning of the disengagement phase of the Interim Ministry; they also form the foundation of future ministry planning, so that hard-won changes will not be lost. Finally, the evaluations contribute not only to the congregation's understanding, but also to the experience of the wider church and to the future work of the Interim Minister.

A Participatory Evaluation Process

An organization can develop numerous evaluation methods to discover and document information about its operations and its members. Some evaluations are very formal, requiring expertise in devising questions and analyzing results. Others are informal to the point of only allowing impressions, with little opportunity to reach substantive conclusions. Sometimes evaluations are developed by one group and administered to a second group, so that the group being evaluated has little input into the design or analysis of the evaluation process.

For Interim Ministry, a participatory evaluation is the most effective way to complete its work. Based on the principles of dialogue and respect, it is intended to include all those involved as equal partners in the process and encourages them to reflect upon and share their personal and collective experience. A participatory process ensures that participants are aware of challenges and limitations, and encourages them to be committed to continuing the process engaged during the interim period.

Participation in evaluating an Interim Ministry allows the entire church community to work collaboratively and to demonstrate how successful the congregation has been in meeting its interim objectives. A well-designed evaluation will help the congregation renew and strengthen relationships among its members, acknowledge its history, affirm its mission, and see the next steps ahead in its ministry. It is important, therefore, that the Transition Team involves the administrative staff, the official board (or equivalent), the Interim Minister, and the congregation in all stages of the evaluation process.

Note that the evaluations done by the Transition Team do not replace the work of the Ministry and Personnel Committee in its larger role of consultation and administrative support for the staff, including the Interim Minister.

Evaluation Questions

If the Transition Team chooses to conduct a participatory evaluation, it involves the congregation in planning the process and developing the questions and issues to be considered. This helps people think about their answers ahead of time, and talk about their ideas with others.

Participatory evaluation is usually done in table discussions with a moderator taking notes. The Transition Team may also wish to use a general questionnaire to solicit responses from as many people as possible. A caution: the form of the questionnaire, and the compilation of results, should avoid any appearance of being a scientific survey, unless the survey and the interpretation of its results are done by an experienced professional. Some examples of questions to gather information are in included in appendixes 14 and 15.

Responses need not be confidential unless serious problems have arisen over the course of the Interim Ministry. If so, the Transition Team has probably invoked procedures to deal with those at an earlier stage.

The Stages of an Evaluation

There are four stages in any evaluation:

1. Review the goals and objectives of the Interim Ministry and the purpose of the evaluations.
2. Engage stakeholders in planning and designing the evaluation, including who will be involved, when, and by what means.
3. Conduct the events; collect and analyze the information.
4. Write the final evaluation reports.

Every church is different, and methods for the review will be appropriate for the situation. The final evaluations will not be a heavy burden if good notes have been kept along the way and have focused on the goals and objectives. As a Transition Team, members are, after all, the experts on this Interim Ministry.

Suggested Timing for the Final Evaluations

Three Months before the Reports Are Due

- ❑ Review all the materials that have been produced. Gather up minutes, reports, and the Interim Minister's reports. Remember the stories together and celebrate all that has been done. Alert the congregation that the evaluation process is starting and ask for input.
- ❑ Determine who will participate in each stage of the evaluation. Besides the Transition Team, consider approaching staff, the official board (or equivalent), or congregational members to help with the tasks, based on their knowledge of the church and their experience with previous evaluations. Involving these other participants increases their understanding of the evaluation's importance. Decide how the Interim Minister will be involved.
- ❑ Determine what resources will be required and when, e.g., meeting space, food, and so on. Make sure that sufficient finances have been allocated, and communicate widely to ensure the widest possible participation.
- ❑ Review the goals that were set at the beginning of the Interim Ministry. Now is the time to refer to the list of possible achievements for each goal, and plan to collect both quantitative and qualitative data to show what has happened.
- ❑ Engage all stakeholders in developing the questions for discussion. Keep the focus on the goals of the Interim Ministry: how people experienced the period, what changes happened for them, and how they see their role in the future.
- ❑ Determine what questions the congregation and staff would like included in the evaluation process.
- ❑ The Interim Minister will prepare a final report during this time as well, and will perhaps make observations that will add to the evaluation questions.
- ❑ Determine how the information will be collected, e.g., congregational meeting(s), several focus groups, individual interviews, a questionnaire. Plan how the results will be gathered and interpreted.
- ❑ Plan the process carefully and make sure everyone knows their responsibilities.
- ❑ Determine whether there are issues of privacy and confidentially involved and if so, what policies are in place to ensure compliance. Privacy and confidentiality issues are especially important when reviewing the work of the Interim Minister.

Two Months before the Reports Are Due

- ❑ Finalize the evaluation questions and decide on the process. Train leaders of focus group and table discussions.
- ❑ Advertise widely and frequently to ensure maximum participation.
- ❑ Conduct the evaluation events, compile the information, assess the results, and draw conclusions.
- ❑ Report back to the congregation and allow for follow-up in case there is widespread disagreement with your report.
- ❑ Share the results and the conclusions of the Interim Ministry's evaluation with the official board (or equivalent), congregation, and staff. Ask for their feedback.
- ❑ Share the results and the conclusions of the Interim Minister's evaluation with the minister. Ask for his or her feedback.

Documentation

For the Evaluation of the Interim Ministry: One month before the Interim Ministry report is due, gather all evaluation summaries, letters, reports, self-submissions, and other necessary documentation, and write the final evaluation report of the Interim Ministry. The final report should include the following:

1. Overview: Why did the church decide to do an Interim Ministry? How did the Transition Team organize its work? What major events occurred along the way that affected its work? How well did the team work together?
2. Mission and goals: What was the mission? What were the goals? Were there modifications to, additions to, or deletions from the goals? If so, state them and give the reasons.
3. Evaluation methodology: What issues were discussed and what was the result? How was information about members, staff, and the Interim Minister gathered and shared?
4. Findings: State if each goal was achieved, partially achieved, or not achieved. If partially achieved or not achieved, what remains to be done? How? Besides work on the goals, what else was accomplished?
5. Interpretation and reflection: In a general sense, how is the congregation different now? Is there a new/renewed sense of health and direction? What were some of the learnings?
6. What are the plans to carry forward the changes that have been made and the new mission strategy?
7. Conclusions and recommendations: What worked well? What do you wish you had done differently? What advice do you have that would help another Transition Team in its work?

The descriptions, evaluations, findings, interpretations, and recommendations in the report should be fully developed, not presented in point form. Remember that others, at the presbytery or Conference level, will read the report and try to comprehend a significant period. Convey as accurate a picture as possible. The presbytery will not be able to make a reasonable recommendation unless it has a complete history with all the facts.

Share the final report with the official board (or equivalent), staff, congregation, and Interim Minister. Ask for formal approval from the congregation.

Documentation for the Evaluation of the Interim Minister: The evaluation of the Interim Minister is focused on his or her work in leading the Transition Team and the congregation to achieve the Interim Ministry goals. Discussions about what happened and how much was achieved will naturally include assessments of the Interim Minister's role, and these will form the basis of this report. Besides comments explicitly related to the Interim Ministry goals, stakeholders may have other comments that will be helpful to the Interim Minister in his or her future ministry, and these may be included in the report.

Draft the report of the minister's performance based on the information already collected, and on the minister's own summary. The minister and the rest of the Transition Team can then discuss whether the review is fair and thorough. The minister and the rest of the team should be in agreement that the comments are balanced and the assessment justified by the facts. The report can then be finalized according to their agreement.

Once the team and the minister have agreed on the assessment of the Interim Minister's work, the evaluation reports must be sent to the Presbytery Pastoral Relations Committee. A decision needs to be made, in consultation with the minister, about what others may receive copies. Confidentiality is an issue here, but it is sometimes helpful if the official board (or equivalent), or at least its executive, and perhaps the Ministry and Personnel Committee receive copies.

After the Reports Have Been Submitted

The Transition Team may feel able to complete some work on the goals or reinforce some of the learning in the congregation. The team will need to formally hand back to the congregation's official board (or equivalent) the responsibility it has had for leading the congregation's mission. That body will consider what can be done about leftover agendas or new issues that have arisen, and how the renewed mission will be carried forward. If there are new ministry personnel coming into the congregation, they will need to be fully briefed on the chosen mission focus and particular projects and tasks.

Bring the Interim Ministry to a Close

By the last month of the Interim Ministry, when evaluation reports have been sent off and the Transition Team has presented its final recommendations, presbytery and the official board (or equivalent) will be deciding the next steps to recommend to the congregation. The congregation will be experiencing the shift from the transition work of the Interim Ministry to the new mission, whatever that involves. The Interim Minister will be disengaging from the congregation, vacating the office, and saying goodbye. It is time to draw a formal end to the Interim Ministry.

Closure is the occasion when the congregation acknowledges the outcomes of the interim period, and says farewell to the Interim Minister. Congregations have their own ways of celebrating: perhaps a special service, a community gathering, a potluck dinner, or some combination of formal and informal observances. Whatever the choices, it is important that people acknowledge what has been accomplished, that the leaders are publicly thanked, and that members of the congregation are given appreciation for their participation.

Appendix 1: Excerpts from *The Manual, 2007*

340 Interim Ministers. The Presbytery shall have authority to appoint Interim Ministers.

(a) When the Presbytery is considering the appointment of an individual to a specific Interim Ministry, the individual shall provide to the Presbytery, at the individual's expense, a current vulnerable sector (level 2) police records check. The Presbytery shall then arrange for an interview between the individual and the Interim Ministry Transition Committee. (2007)

(b) A recommendation for the appointment of the individual to the Pastoral Charge, Mission, or Outreach Ministry shall be made by the Interim Ministry Transition Committee to the Official Board or Church Board or Church Council. If the recommendation is supported by the Official Board or Church Board or Church Council, it is then presented to the Presbytery on behalf of the Pastoral Charge, Mission, or Outreach Ministry.

(c) The Presbytery shall make a Decision with regard to the appointment.

(d) The Presbytery shall provide an act of covenant where a new pastoral relationship is established.

(e) The Interim Minister shall not be available to serve the Pastoral Charge, Mission, or Outreach Ministry in any call, settlement, or appointment that immediately follows the completion of the appointment as Interim Minister.

054.1 Interim Ministry Transition Committee.

(a) Membership. The Interim Ministry Transition Committee shall include:
   i. one (1) or two (2) representatives of the Presbytery appointed by the Presbytery Pastoral Relations Committee; and
   ii. five (5) to seven (7) representatives in full membership of the Pastoral Charge, appointed by the membership of the Pastoral Charge or by the Official Board or Church Board or Church Council of the Pastoral Charge.

(b) Committee Process. The first meeting of the Interim Ministry Transition Committee shall be convened by a Presbytery representative, and shall fix its own quorum, which shall in no case be lower than four (4), including at least one (1) representative of the Presbytery and at least three (3) representatives of the Pastoral Charge. The Committee shall determine its own process.

(c) Review and Evaluation. During the period of the Interim Ministry, the Interim Ministry Transition Committee shall:
   i. review and develop the goals of the Interim Ministry, and monitor and evaluate activities that enable the Pastoral Charge to work on those goals;
   ii. be represented on the Official Board or Church Board or Church Council for purposes of liaison and reporting, including progress reports;
   iii. participate in the evaluation of the Interim Ministry at its conclusion; and
   iv. participate in the evaluation of the work of the Interim Minister at the conclusion of the Interim Ministry.

The Interim Ministry Transition Committee does not replace the Ministry and Personnel Committee of the Official Board or Church Board or Church Council. (2007)

Appendix 2: United Church Resources

Contacts

- Chair, Presbytery Pastoral Relations Committee
  or Presbytery Pastoral Relations Minister
  c/o the presbytery in which the pastoral charge is located
- Conference Interim Ministry Committee
  c/o the Conference in which the pastoral charge is located
- Human Resources Unit
  The United Church of Canada
  3250 Bloor St. West, Suite 300
  Toronto, ON M8X 2Y4
  1-800-268-3781

Publications

These General Council Office publications are available for free download on the United Church website (www.united-church.ca/handbooks) or for a nominal cost from United Church Resource Distribution.

- *A Handbook for Ministry & Personnel Committees* (revised 2003)
  (esp. Appendix D, Guidelines for Developing Ministry Personnel Job Descriptions)
- *Handbook for Joint Needs Assessment Committees* (revised 2007)
- *Handbook for Joint Search Committees* (revised 2007)
- *Interim Ministry Handbook* (2001, revision in progress in 2009)

Appendix 3: Glossary

Congregation: a body of persons that is a part of the United Church and that meets for public worship and is constituted by a presbytery.

Interim Minister: a member of the Order of Ministry* or a Designated Lay Minister* who, based on appropriate training and experience, has been appointed by the presbytery to an Interim Ministry.

Interim Ministry: an intentional, time-limited ministry established by the presbytery, the purpose of which is to work toward specific goals identified by the presbytery and the pastoral charge.

JNAC (Joint Needs Assessment Committee): the group charged with the responsibility of assessing the needs of the pastoral charge at the time of vacancy.

JSC (Joint Search Committee): the group charged with the responsibility of conducting a search and recommending to the pastoral charge the name of one ministry personnel for call or appointment.

Pastoral: having to do with the work of caring for a congregation.

Pastoral Charge: one or more congregations constituted by a presbytery into a pastoral unit according to the polity of the United Church.

Transition Committee: this term is used in *The Manual* to refer to members of the congregation and presbytery representatives who work together to set the goals of the Interim Ministry and recommend the selection of the Interim Minister, and then work in a team with the Interim Minister.

Transition Team: the Transition Committee and the Interim Minister become the Transition Team, who collaborate to lead the congregation through the Interim Ministry.

*** Position classifications for ministers of The United Church of Canada**

Order of Ministry: diaconal and ordained ministers of the United Church.

Ordained Minister: a member of the Order of Ministry who has been ordained to the ministry of word, sacrament, and pastoral care.

Diaconal Minister: a member of the Order of Ministry who has been commissioned to a ministry of education, service, and pastoral care.

Designated Lay Minister: a lay member of the United Church appointed by a presbytery to serve in paid accountable ministry, in a pastoral charge or other presbytery accountable ministry, in a position designated by the presbytery as accountable to the presbytery.

Appendix 4: Developing the Interim Minister's Position Description

At the time of the appointment, the Transition Team, the new Interim Minister, the presbytery, and the Conference fill out the Record of Appointment form (MEPS 433 AP).

Page 5 of that form relates to the special terms of Interim Ministry appointments and requires a statement of the preliminary goals of the Interim Ministry. These can be two or three broadly stated reasons for the interim, such as these:

- to lead the congregation in a process of healing and reconciliation after a time of conflict
- to lead the congregation in redeveloping its vision of mission and ministry
- to lead the congregation in revitalizing its mission after a long pastorate

The preliminary goals form the core of the position description, and later, as the Transition Team and the Interim Minister work together, are developed into specific goals and action plans.

Besides working on these broad goals, the congregation will expect the Interim Minister to do the "usual work" of a minister. One of the tough realities is sorting out the duties, bearing in mind that the interim work takes real time and must take priority for the duration of the interim appointment.

The position description needs to reflect this difficult juggling act. It is important to help the congregation understand that some of the "usual work" will have to be done by someone else, done to a lesser extent, or deferred. Interim Ministry cannot simply be added to an already full pastoral schedule. The other distinctive thing about the position description in Interim Ministry is that it will change during the course of the interim period as the focus shifts from one goal to another. It helps the congregation (not to mention the Interim Minister) if these changes are handled transparently, so that people begin to learn that ministry has different needs at different times.

The "Ideal" Week

A useful way of laying out the position description is by describing an "ideal" week. Real weeks are never ideal, of course, but the ideal gives a good basis for accountability. A minister's work week is 40 hours. It includes worship, administration, pastoral care, and Christian education. The Interim Ministry part of the job involves time for working with the Transition Team, research and data gathering, planning special events, writing reports, and so on.

For example, a position description might distribute time in the following way:

Worship planning, preparation, and delivery (recommended minimum)	14 hours
Administration and committee meetings	4 hours
Pastoral care	8 hours
Christian education	2 hours
Community, presbytery, and Conference ministry	4 hours
Special interim work	8 hours
Total	40 hours

The struggle comes in determining how realistic these timeframes are and what to do when they are not. If the congregation needs much more pastoral care than can be fitted into the schedule, who will pick up the extra? If the minister has always been expected to play a major role in community ministries, can that expectation be set aside for the interim appointment? If the congregation is used to having a wide range of educational opportunities available, could there be just one a year?

Be clear and realistic about expectations, so that everyone understands that the best possible use is being made of the gifts and skills the Interim Minister brings to accomplish the goals that have been set.

Appendix 5: Setting Transition Team Norms and Values

Purpose

- To facilitate the Interim Minister and Transition Team members getting to know each other
- To provide an informal but in-depth exchange of views on how the Interim Ministry should proceed
- To produce a set of values team members commit to abide by

Means

The Transition Team members and the Interim Minister will express their personal wishes with respect to

- the procedures they hope to see followed
- the working relationship they wish to experience
- their desired relationship with the congregation

Expected Outcomes

Team members and the Interim Minister will

- share expectations for the Interim Ministry
- be introduced to each other's skill, values, and concerns
- experience the foundation of a team relationship

Process

The process is accomplished in two meetings. In the first, requiring at least 2½ hours, the importance of setting group norms is explained and participants' responses in three values areas are listed. In the second, requiring up to 45 minutes, participants endorse a refined list and commit to honouring the values they have named.

The first meeting can take place in an informal setting; the second can be part of a regular meeting. Flip charts, paper and felt pens, and masking tape are required.

Leadership

- Facilitator: Someone able to model active listening and probing for meaning. The facilitator may be an outside person, the chair of the Transition Team, or the Interim Minister. If an "insider" takes this role, that person becomes a participant-facilitator, as input is needed from everyone who is part of the team.
- Recorder: Someone able to listen and quickly transcribe responses onto a flip chart.

First Meeting

Introduction

Explain the purpose of the meeting: to describe and document the team's working principles with respect to: i) the task, ii) the working climate the team wishes to have, and iii) the team's desired relationship with the congregation. Clear working principles will

- set mutual expectations among team members and with the Interim Minister regarding interpersonal conduct and the work of the interim period
- create guidelines, to be checked periodically throughout the interim period, to keep the work on track
- provide reference points for evaluating the team's effectiveness at the end of the interim period

Agenda

The facilitator sets the following guidelines for the discussion:

- each person to speak in the first person: I like…; I value…; I want…
- respond for clarification as needed, but no rebuttal is allowed
- all responses will be transcribed on flip chart in front of the group

The facilitator asks three questions:

- What is important to me about the work this team produces?
- What do I need from others to help me fully participate in this group?
- What is important to me about how the congregation relates to our work?

The facilitator asks team members each question in turn, and ensures that each has the opportunity to respond. (If the facilitator is also a participant, include the facilitator's responses.) The facilitator ensures respect for all contributions.

The recorder writes each individual's response to each question on flip chart sheets.

The facilitator makes sure the responses are recorded succinctly, but reflecting the words of the speaker as accurately as possible.

Closing

The group may notice themes emerging from the individual responses; if so, those themes may be listed on a separate flip chart page. The facilitator explains that the flip chart notes will be clarified and edited to eliminate redundancy, and a final summary will be brought back to the group's next meeting for review.

Second Meeting

The facilitator presents the refined list of values to team members, then leads a review of the principles, section by section. The facilitator encourages open discussion of doubts or hesitations so that the concerns may be clarified and revisions made, if necessary. Any revisions must have everyone's approval.

Before the document is finally accepted, the group pauses for personal reflection, so that each person may consider whether he or she can commit to the stated principles. Each team member is then asked for his or her commitment to abide by the norms. Some individuals may find they cannot agree, and in the discussion, may consider what their level of participation will be, if any. (Better this is dealt with now than in discussion of a contentious issue later.)

These norms may be used as a basis for articulating the mission statement of the Transition Team. If this is done, this statement must also be ratified by the whole team.

After final acceptance, the completed document(s) should be copied and given to every member of the team. The final documents can be appended to the Transition Team's report to the official board (or equivalent) and may be shared with the congregation.

See the next page for an example of group norms

An example of group norms from one Transition Team:

In our work, we will

- honour the transition themes, and be creative in planning
- use consultative and inclusive processes, and be open and accessible
- seek all relevant information to help us, and take the time to discern what is needed
- decide by consensus
- define tasks before delegating
- dedicate ourselves to achieving specific, concrete outcomes
- use frequent mini-reviews to keep ourselves on track

In working together, we will

- listen to each other with care and attention, and maintain trust
- be informed and keep informed
- hear every member in decision-making, and respect each other's values
- work out differences and deal openly with conflict
- bring our wisdom, not our special interest, to every discussion
- together, take time to pray and to celebrate

In our relationship to the congregation, we will

- exercise leadership by providing vision and possibilities
- be open and consultative, and considerate of divergent views
- collaborate with other groups, and bring balance to special interest representation
- practise and model Christian relationship
- use our experience to sense the deeper wisdom of the congregation
- be responsive and accountable through the official board (or equivalent)
- speak publicly as one voice

The mission of this Transition Team is to listen for the many voices of God's Spirit in our congregation, work to achieve the Interim Ministry goals, help discern the congregation's mission and ministry need for the next ________ years, and use our collective wisdom to provide leadership that has integrity and validity.

Appendix 6: Sample Decision-Making Agreement

The following principles were agreed to by one Transition Team that decided to use a consensus-seeking model.

1. We must hear from everyone before any decision is made.
2. Responsibility lies with each person, but the chair will also make sure that everyone is heard, understands the issue, and states his or her opinions on the matter.
3. If anyone is absent from the meeting, no decision will be considered final until those who were not present are briefed on the discussion, understand the implications of the decision, and make their judgment. *Note:* We can use e-mail or other "distance" means to inform a member about a partial consensus reached in his or her absence. However, an e-mailed reply indicating agreement is sufficient *only on procedural matters.* On matters of substance, every effort must be made to include the absent person in discussion before completing the consensus to a decision.
4. We reach consensus when all members find themselves at one of these levels:
   - totally in favour
   - some reservations but generally in favour
   - serious reservations but will go along
   - or, at the very least, do not object to the decision of the group
5. When there is an irresolvable objection, that is, when any one person cannot go along with the judgment of the group, we agree that the matter will be put to a vote.
6. If there is a vote, a team member who objects may *abstain,* thereby recording the reservation. However, that person agrees to abide by the majority decision and will continue to honour confidentiality.
7. Those who cannot abide by the majority decision may wish to resign from the team. They would then be free to state the reasons for their abstention in public, providing they do not violate the principles of confidentiality.

Appendix 7: Creating a Visual Timeline

1. If done by the team, creating a visual timeline will probably involve lots of adjustments and corrections. Start by posting a large calendar that shows the length of the interim period with plenty of space for revisions.
2. Starting with the current date, map out the anticipated events of congregational life, e.g., Advent and Christmas, Lent and Easter, months of least attendance, regular meetings of the official board (or equivalent) and the annual general meeting, and any other significant yearly events.
3. Add the dates and deadlines within the interim period itself, e.g., a date for the mid-term evaluation, the Interim Minister's holiday time(s), break time(s) for the team, a date for beginning the final evaluation.
4. The stages of the work of the interim period can now be inserted into this framework, e.g., deadlines for completion of each phase of the work, anticipated timing of reports to the official board (or equivalent), dates for small group consultations and congregational gatherings, a date when final reports will be due, closure events.

   While doing this step, keep in mind

   - enough time for collecting and documenting information, writing and verifying it, printing and copying it, and distributing it in advance if necessary
   - preparation time for meetings and congregational gatherings, including planning time, training time for facilitators if necessary, and the time needed for advance notice
   - preparation time for reviews and evaluations
5. When the team is satisfied that the schedule is workable, transfer the draft to a more manageable format, make sure everyone has a copy, and use it to track progress. Undoubtedly it will have to be revised from time to time to accommodate the unexpected, but it will help guide the transition work.

Appendix 8: Initial Small Group Conversations

Time: minimum 2 hours for discussion, with extra time for refreshments if desired
Group size: no fewer than 6, no more than 10
Participants: people who have signed up in the group of their choice
Leadership: a facilitator and a recorder

Purposes

- To engage people in a congregation in reflection on their life in a faith community
- To inspire the congregation's trust in the interim process and leadership of the Transition Team
- To collect information from which to identify the key themes that characterize the congregation's life, from the point of view of its members and adherents

Welcome and Introductions

Facilitator begins with prayer, introductions, and a clear statement about the purpose of the meeting and how the information will be used. Then ask for a round of introductions, giving a few moments for participants to express how they felt when they were invited to attend.

Explain the following group guidelines and ask for agreement (these are posted in plain view throughout the gathering):

- Participation is voluntary: no one is obligated to speak, and anyone may pass at any time.
- Speak only from the personal: state your own experience, using "I" statements.
- Listen to others with the respect you would like for yourself.
- Ask questions for understanding, not to dispute.
- Agree to confidentiality, i.e., that what is said in the group stays in the group.

Questions

Questions are to be dealt with one at a time. Participants respond to the first question in turn and their responses are recorded on the flip chart before the group moves on to the next question.

- In your life at _______________ United Church, what has been most important for you?
- Has anything caused you discomfort, aggravation, or distress?
- What keeps you coming?
- What do you hope for in your future life in this church?

If there is time, one further question might be asked at the end (do not start with this question!) to gather opinions about the church in general. Ask a question such as, "What would you say is the most important issue facing _______________ United Church today?"

Role of Facilitators

- Arrange a comfortable setting with chairs in a circle or horseshoe, so that participants can see each other. Have everything ready: flip chart paper, tape, markers, etc.
- Welcome participants, introduce self and recorder, and put people at ease.
- Be clear about the purpose: to *collect information,* not discuss issues.
- Make people aware of time limitations, and ask for their co-operation (monitor time per person, especially if the group is large).
- Ask one question at a time, and summarize responses to help the recorder.
- Remind participants about the ground rules whenever necessary.
- Make sure everyone who wishes to answer gets a turn.
- At the end, thank people for their participation and trust, and say again how the information will be used.

Role of Recorders

- Make sure each flip chart page is identified by number or question for ease of compilation later.
- Record participants' responses (not their names) on flip chart so that everyone can view them as they are written.
- Record in phrases and sentences, as close to the actual spoken words as possible.
- Check accuracy by asking each person if what is written reflects what he or she meant.

Data Compilation, Editing, and Publishing

One or two people will have the task of receiving every group's recorded responses and compiling them into one document. The Transition Team will then need time to read the document and analyze the data for dominant themes. Finally, the findings will be incorporated into a final report, which must be drafted, edited, and printed for distribution to the congregation.

Further Tips for the Transition Team

- Before starting these cluster groups in the congregation, form a group with the facilitators and recorders as participants. This acts as a training experience and allows them to give their personal input *outside* of the group where they will give leadership. It also lets them know what participants will be experiencing. Set aside 2½ hours, and use the extra half hour to review and clarify all the steps.
- Someone from the Transition Team should always be available as support for facilitators and recorders when groups are in session. Facilitators and recorders may need support for debriefing or someone to call in case of an unexpected incident in the group.
- Ensure that recorders practice writing responses that will be clear when someone else reads them, and that they know where to deliver the numbered pages of responses when the group is over.
- Arrange for someone to compile the responses by transcribing them just as they appeared on the flip charts.
- Use the compiled information to pick out common themes. Don't get lost in counting pros and cons; pick out *subject themes* by noting which subjects were most mentioned, and whether positively or negatively.

Appendix 9: Planning Small Group Meetings

Careful planning will ensure a useful outcome from any small group process. The purpose of a group should be carefully thought out before the process is designed. Exactly describing the focus and depth of participation needed to achieve it can make the difference between a productive process and an ineffective or incomplete one. Then, effective recording ensures that the results become part of the record.

Set the Goals

Be clear about your purposes for engaging the group. Consider these related components:

- *Need:* What is the reason for holding this group?
  i.e., What is the need? Why a group? Why *this* group? What outcome is expected?
- *Expectations:* What is expected of group participants?
  i.e., To receive information? To give information? To share viewpoints? To consider options? To discuss? To make a decision? To agree to take action?
- *Anticipated benefits:* What will participants experience?
  i.e., What will they learn? How do you hope they will feel when they leave?

Plan the Process

Use the goals regarding need, expectations, and benefits as criteria in deciding the following:

- *Participants:* Who should they be, and how should they be invited and prepared?
- *Format:* What will be the initial stimuli, key interventions, discussion timing, closing statement?
- *Duration and timing:* What time will it start and end?
- *Leadership:* Who is best, and for what parts?
- *Discussion:* How can participants be kept on track and everyone included?
- *Outcomes:* How will the discussion be recorded?
- *Use of the Results:* How will results be collated? Checked for correctness? Communicated?
- *Application:* How and to whom will the results be communicated?

Evaluate the Outcomes and the Experience

Finally, take time to identify what was learned from this activity. Consider these aspects:

- How effectively did the process deliver the information you were aiming for?
- How well did the process engage the participants?
- How well did the meeting fulfill its purpose?
- Were there any unexpected outcomes or other factors that affected the process?
- What has this experience added to the self-study? What else is needed?

Appendix 10: Planning Effective Congregational Meetings

An Interim Ministry usually includes several gatherings of the whole congregation. In planning the gatherings, consider the following:

- **Primary purpose:** *Establish the purpose, and then design the gathering to achieve it.*
  Is this meeting meant to get information? To share information? To discuss? To gather ideas? To invite involvement? To learn something? To set priorities? To discern? To arrive at an agreement? To make a decision? What format best facilitates achieving the purpose?
- **Advance notice:** *Ensure that participants have what they need to participate fully.*
  Who should be included? What kind of notice must be given? What information should be provided ahead of time? How, and how soon?
- **Leadership:** *Provide suitable and trained leadership.*
  What type of leadership is needed: Facilitators? Discussion leaders? A chair? A panel? What exactly do you expect of the leaders? How can they be helped to be effective: A training session? A prepared script? A simulated rehearsal?
- **Technical and logistical details:** *Make sure all equipment is in place and working.*
  What technical aids are needed: Overheads? Projector? Screens? Computer? Microphones? Recording equipment? Who will ensure it is set up and working? Who will oversee its proper operation during the event?
- **Respect participants' needs:** *Start and end on time; explain what will happen.*
  Who will chair? Is a printed agenda required? Who needs to be introduced? What is the expected length, and who will keep time? Are refreshments needed?
- **Discussion management:** *Ensure safety and ease for people to speak.*
  What will help people speak up? Are guidelines needed? Are microphones needed? What obstacles, arguments, or dissent might be expected? How can it be dealt with? What time limits are necessary?
- **Recording:** *Prepare for documenting the outcomes.*
  How will outcomes be recorded? Who will take notes? Are forms needed? How will the responses be compiled? By whom? When?
- **Dissemination:** *Plan how the outcomes will be communicated.*
  How will the results be shared? Other than those attending, who needs to know the outcomes of the gathering? How soon?
- **Debriefing and evaluation:** *Take time to learn from the experience.*
  Who should be involved in sharing perceptions and observations, and evaluating how effectively the purposes of the meeting were met? When? How will the information be shared and with whom?

Appendix 11: Soliciting Information and Feedback

At various times, the Transition Team will need to gather information or feedback from the congregation. A number of methods may be used: planned but casual conversations; write-in comments; paper and pencil surveys; one-to-one interviews; group interviews; congregational meetings; post-meeting feedback forms.

Before choosing a method, consider these questions:

- What type of information is desired? Is it reaction to some issue? Establishing priorities? Phrase the question so as to get the kind of answer you are looking for.
- Choose the method of getting feedback according to the information sought and the part of the congregation to be heard from.
- Who is likely to participate? (Bear in mind that a total response is not likely.)
- Will the responses be representative or reflect a certain viewpoint? Will that be satisfactory? (Be realistic: e.g., a visioning response may be unlikely if there is a pervasive mood of gloom.)
- Are the people you are asking informed enough to be able to respond knowledgeably to the questions?

Each method has advantages and disadvantages, and will provide different kinds of information. Understand that the way questions are asked to a large extent determines whether responses will provide information that is specific, relevant, and usable. Test the questions with each other to be sure you are asking in a way that elicits a useful response.

Tips

- Explain the purposes for collecting the information.
- Explain how the results will be used, and who will be seeing individual responses.
- Make it easy for people to give the information in as concise a way as possible.
- Plan for how the information will be collated; it may influence the way the questions are asked.
- To test general reactions, use a rating scale (e.g., 1 to 5) rather than a yes/no choice.
- On a paper response form, always ask for “other” comments. (These can sometimes produce gems!)
- Respect confidentiality. *Never* divulge names unless permission is asked for and given.
- If the resulting information is returned to the congregation, do it in such a way that people may recognize their own contribution yet remain anonymous.

Appendix 12: Tips for Effective Reviews

1. No matter what method is used to collect feedback from a group of people, make sure the purpose of the review is clearly communicated, as well as how and to whom the results will be communicated. Explain that a review is not aimed at describing what was "good" or "bad," but rather at assessing to what extent the objectives were reached, and how well the process worked.
2. A valid review takes place only when people are asked to react to appropriate criteria, that is, against the objectives or goals that were originally set.
3. A valid review ensures that there is feedback from most, or at least a representative sample, of those who have experienced or been affected by the work being evaluated.
4. An essential starting point for each review is recalling exactly what the purposes were. Citing the original objectives from reference documents is very important.
5. A review that yields useful information will have encouraged the use of descriptive, not judgmental, language. Use focused questions that will yield specific feedback. Avoid asking for general impressions or opinions.
6. Prepare people to participate by giving them the questions ahead of time so that they can give more thoughtful answers.
7. When conducting a review in any group, make no assumptions about uniformity of opinion. Encourage the expression of all points of view so that there can be a thorough analysis of what helped and what hindered the interim process.
8. Ensure confidentiality throughout the collecting, compiling, and disseminating of information.
9. Ensure that if personal information is to be shared, permission to do so has been granted beforehand by the individuals concerned.
10. The final question to every review must be, "What have we learned?" Effective evaluative reviews will produce information and reveal methods that may be useful in the planning and carrying out of future endeavors.

Appendix 13: The Mid-Term Review

About halfway through the interim period, presbytery will require a review to assess how far along the congregation has moved in meeting its goals for the interim period, and how well the work of the Transition Team is progressing. A mid-term review is also a chance to check others' perceptions of what is happening to compare with the team's own perceptions.

When planning to conduct such a review, decide the main areas that will be assessed, who will be asked for input, what methods will be used to collect responses, and how the results will be compiled and assessed. Make sure that the original transition goals and interim timeline are on hand, at least in summary form.

The Transition Team may use the feedback to analyze what has been happening in the congregation as a result of its work:

- Is the congregation moving toward this goal?
- Did our method(s) work in achieving this outcome? Has anything unexpected come up? Is this process or task complete?
- Are people responding to the transition work? What has or has not been effective? Does anything seem to be blocking the work?
- Check overall progress against the timeline: How much has been accomplished? Is the work on target? What is left to do?
- Finally: How well have the Interim Minister and the other Transition Team members been able to collaborate?

A review may help the team discover

- effective interventions
- particular problems
- unexpected obstacles or missteps
- whether the work is on target
- the effectiveness of the working relationship between the Interim Minister and Transition Team
- expectations about the congregation's next steps
- whether assistance is needed in any area

If the results are documented and distributed, the Transition Team should have the opportunity to check the content first.

Appendix 14: Final Evaluation of the Interim Ministry

Sample Questions for Discussion

Questions should focus on the Interim Ministry goals, so that people are engaged in thinking about the changes that have occurred and how these will carry forward. The assumption is that these questions are discussed in a small group context, but provide opportunities for written responses for those unable to attend events.

The goals of the Interim Ministry were (list them)….

___

___

- In your opinion, was goal number 1 (2, 3, etc.)
  ☐ accomplished ☐ partially accomplished ☐ not accomplished
  Comments: ___
- What remains to be done?
- Did you feel involved in the Interim Ministry? What part did you play?
- What was the highlight for you?
- What is the biggest difference you can see in the congregation since the Interim Ministry began?
- What do you think will be the biggest impact of the Interim Ministry on the future of the congregation?
- The congregation did an effective job of supporting the Transition Team and the Interim Minister.
  ☐ Very much ☐ To some extent ☐ Not at all
  Comments: ___

Evaluation of the Performance of the Transition Team

The focus of the question is on the work, not the personalities.

- The Transition Team were effective leaders of the interim process.
  ☐ Agree ☐ Slightly agree ☐ Slightly disagree ☐ Disagree
  Comments: ___
- The Transition Team kept us all well informed and involved in the process.
  ☐ Agree ☐ Slightly agree ☐ Slightly disagree ☐ Disagree
  Comments: ___
- The Transition Team invited and respected all points of view.
  ☐ Agree ☐ Slightly agree ☐ Slightly disagree ☐ Disagree
  Comments: ___

Appendix 15: Evaluation of the Performance of the Interim Minister

Sample Questions for Discussion

The assumption is that the questions are discussed in a small group context; you may wish to provide an opportunity for written responses for those unable to attend events. Make sure all questions focus on the Interim Minister's work and not on his or her personal qualities.

See the following examples:

The Interim Minister

- led us effectively through the interim period and helped us accomplish the interim goals.
  ☐ Very much ☐ To some extent ☐ Not at all

  Comments:____

- helped us to understand our history and our present realities.
  ☐ Very much ☐ To some extent ☐ Not at all

  Comments:____

- encouraged us not to lose hope.
  ☐ Very much ☐ To some extent ☐ Not at all

  Comments:____

- helped us find new energy and vision.
  ☐ Very much ☐ To some extent ☐ Not at all

  Comments:____

- was an effective minister of worship, pastoral care, outreach, and education.
  ☐ Very much ☐ To some extent ☐ Not at all

  Comments:____

Appendix 16: Book List

See also appendix 2, United Church Resources.

Most Useful

William Bridges, *Transitions and Managing Transition* (Reading, MA: Addison-Welsley Publishing 1991).

Janet R. Cawley, *Who Is Our Church? Imagining Congregational Identity* (Herndon, VA.: The Alban Institute, 2006).

Roger S. Nicholson, ed. *Temporary Shepherds: A Congregational Handbook for Interim Ministry* (Bethseda, MD: The Alban Institute, 1998).

Gilbert Rendle, *Behavioural Covenants in Congregations: A Handbook for Honouring Differences* (Washington, DC: The Alban Institute, 1999).

Gilbert Rendle and Alice Mann, *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations* (Washington, DC: The Alban Institute, 2003).

Jan Magruder Watkins and Bernard J. Mohr, *Appreciative Inquiry: Change at the Speed of Imagination* (San Fransisco, CA: Jossey-Bass Pfeiffer, 2001).

Also Relevant

Keith Bayer, *The Tipping Point—A Consultant's Perspective* (www.potentials.ca/publications.html).

Mark Lau Branson, *Memories, Hopes and Conversations: Appreciative Inquiry and Congregational Change* (Herndon, VA: The Alban Institute, 2004).

William Bridges, *Making Sense of Life's Changes* (Don Mills, ON: Addison Wesley Publishing Co., 1980).

Carl S. Dudley and Nancy T. Ammerman, *Congregations in Transition: A Guide for Analyzing Assessing, and Adapting in Changing Communities* (Jossey-Bass, 2002).

Kenneth A. Halstead, *From Stuck to Unstuck: Overcoming Congregational Impasse* (The Alban Institute, 1998).

Ronald A. Heifetz, *Leadership Without Easy Answers* (Cambridge, MA: Belknap Press, 1994).

Jill M. Hudson, *Evaluating Ministry: Principles and Processes for Clergy and Congregations* (The Alban Institute, 1992).

C. Ellis Nelson, *Congregations: Their Power to Form and Transform* (Atlanta, GA: John Knox Press, 1988).

Gilbert Rendle, *Leading Change in Congregations: Spiritual and Organizational Tools for Leaders* (Washington, DC: The Alban Institute, 2003).

Peter L. Steinke, *Congregational Leadership in Anxious Times* (Herndon, VA: The Alban Institute, 2006).

Peter L. Steinke, *How Your Church Family Works* (Washington, DC: The Alban Institute, 1993).

What Interim Ministers Say About Change…

- *People must be uncomfortable enough to want to change; but comfortable enough to change.*
- *Change has a lot to do with identity: if you know who you are, then you can see who you want to be.*
- *Gossip and rumour are just as influential as the truth. So are secrets. They must all be opened up.*
- *Wanting to heal is the beginning of change.*
- *Validate the down-side: accept that it is what it is.*
- *Use history to open the secrets and free the truth.*
- *Be a change agent in a joyful way: count blessings and use them.*
- *Respond to hurt as hurt—not as a problem to be solved.*
- *Provide people with the language to help them talk about faith things and identity.*
- *People will change if change leads them where they want to go.*
- *Change never stops; what stops is making the necessary transitions.*
- *People don't want to be changed; they want to be blessed.*
- *The people who lead transitions also need support.*

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