

Heir Apparent

A retiring pastor and his successor discover what it takes to make a transition plan work.

by Skye Jethani

When King Charles II of Spain died in 1701 with no heir, the result was the War of Spanish Succession, which embroiled France, England, Italy, Austria, and the Netherlands in a conflict that lasted 13 years.

Planning ahead for succession matters. It's a lesson churches are learning, too, especially congregations with lead pastors of long tenure. How well a church plans for leadership transition may determine its long-term health. Failure to plan may result in stagnation, or as Spain discovered, serious conflict.

Pete Schwalm knew the dangers well. Senior pastor of Fairhaven Church in Dayton, Ohio, since 1983, Schwalm privately began thinking about succession ten years ago.

"I'd heard the war stories of new senior pastors coming in and cleaning house—getting rid of all the staff," says Schwalm. "Fairhaven has 15 fulltime pastoral staff members with families, and I genuinely care about them. I didn't want to see these great people forced to leave the church when I did."

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Beyond affection for his pastoral team, Schwalm wanted Fairhaven's trajectory and direction to continue after his departure. He recognized that a lengthy search for a new senior pastor could stall the congregation that had grown from 500 when he began to over 3,000. "I hoped the church would continue basically in the same direction after I left."

This desire for continuity has led a growing number of churches to look for a new senior pastor from within their own ranks. When Stuart Briscoe retired from Elmbrook Church near Milwaukee, Wisconsin, the staff member who replaced him had already been at the church for more than 20 years.

Anticipating his own departure, Schwalm believed an internal plan of succession would be the least disruptive for the church. After investigating the transition plans of other churches, Schwalm first shared his thoughts with the governing board of Fairhaven in June 2001. The board recognized the benefits of a planned transition.

"We had seen another large church in Dayton go through a senior pastor change," said Fairhaven elder Tim Cornell. "The new pastor came from outside, and he did a great job, but he totally changed the church. We didn't want that. We liked the path we were on." With the board supporting the plan of finding the new pastor from within the church, one critical question remained—who?

Floating the idea

David Smith came to Fairhaven with no intention of becoming the senior pastor. He was first introduced to the church while serving as pastor of an international church in Malaysia.

"Pete called me from the U.S. and said, 'Hey, I'd like to talk to you about ministry at Fairhaven Church,'" Smith recalls. The church was looking for an associate pastor of international ministries, and Smith came highly recommended through a mutual friend.

In the summer of 1996, Smith agreed to visit Fairhaven and explore the possibility of coming on staff when his commitment in Malaysia ended in 1998. During his visit to Fairhaven, Smith preached on Sunday.

“We weren’t searching for my replacement at that time,” said Schwalm. “We were looking for someone to lead our missions program. But, when I heard David preach, I thought to myself, *This guy has real potential.*” Schwalm floated the idea privately to a trusted elder at the church.

“He said, ‘I could see that,’” recalls Schwalm. “After that conversation, we didn’t talk about it again for a few years.”

Two years later David Smith came to Fairhaven as an associate pastor. Along with leading the church’s international ministries, he also began a Tuesday night service for younger adults and shared some preaching responsibilities.

Seeing Smith’s leadership and relational skills, his good connection with other staff members, and his strength in the pulpit convinced Schwalm it was time to address the idea of succession more openly.

In 2001, three years after Smith came to Fairhaven, Schwalm approached him about becoming the next senior pastor.

“I’m thankful that I wasn’t hired with the intent of becoming the senior pastor,” said Smith, “because it would have led me to come under very different pretenses. As an associate I was able to connect with the other staff as a colleague. But when Pete spoke to me about taking the senior role, I wondered how the transition from associate to senior pastor would be done.”

“I don’t know,” Schwalm replied at the time. “Let me work that out.”

Dimmer switch

After agreeing, in theory, to the idea of internal succession, Fairhaven’s governing board began discussing who the next senior pastor might be. In April 2002, Schwalm presented his recommendation of David Smith to the board.

“I told the board what I thought of David, but I also said ‘This is something you guys need to decide apart from me because inevitably there will come hard times, and when those times come, you guys need to know that God brought David here, not me.’”

Tim Cornell recalls the board’s reaction: “Some people talked about doing a wider candidate search, but at the end of the day, we all knew that David was the guy we were going to pick. We liked the transition plan because we got to keep David, whom everyone liked, and the plan honored Pete while keeping the church moving forward.”

With the governing board, Schwalm, and Smith all in agreement, the church developed a three-year transition plan. In 2003, Smith’s title would become “senior pastor associate” and he would preach 40 percent of the Sundays with Schwalm preaching 60 percent. In 2004, the preaching ratio would be 50/50. And in 2005, Smith would become senior pastor. Schwalm would become “senior pastor associate” and would preach about 40 percent of the Sundays.

“Most church transitions are like light switches,” says Smith. “One pastor leaves, the light is turned off. The new pastor arrives, and the switch is turned on. It’s abrupt and obvious. We thought of our transition as lights on dimmer switches. As one is dimming down, the other is brightening up. The ambiance of the room, or in this case the culture of the church, doesn’t noticeably change.”

Who’s really the boss?

With a plan in place, Fairhaven began the three-year transition in 2002 with confidence. Smith assumed his new role as senior pastor associate, and the succession plan was publicly announced to the congregation.

“The transition from Schwalm to Smith was probably imperceptible to most people. The church was so used to seeing them both,” said Cornell. But that seamlessness was the result of lots of planning behind the scenes.

“When we first developed the plan,” said Smith, “it looked more like a preaching schedule. But as we moved into the transition, we realized there was more to it than preaching. The senior role also comes with vision and leadership, so we had to determine how to transition those things as well.”

Schwalm and Smith faced a more delicate issue when determining how to lead the staff and board.

“We started to notice that when one of us spoke at a staff or board meeting,” Smith reported, “there was a bit of rubbernecking to see what the reaction of the other one was. They were wondering, *Who’s really the boss here?*”

One solution to this problem was structural. For example, while both Schwalm and Smith sat on the governing board, only the senior pastor at the time was given a vote. It was clear who had the final say on an issue. Likewise, the two pastors were careful to discuss things ahead of time so other leaders knew they were united.

“On an organizational chart it really is a mess,” says Smith. “You create a situation with a senior pastor and a senior pastor associate where staff persons, conceivably, if they don’t get what they want from one, would go to the other. That’s what we avoided by always meeting with staff together.”

Building a base of trust

Although such structures helped, both Schwalm and Smith believe it has been their strong personal friendship that has made the transition work.

“In 2004, when everything was really shifting and David was taking more leadership, we’d get together every week and just talk,” recalls Schwalm. “He brought me in on every issue, so that he never surprised me. He made me feel good about the transition.”

“I told Pete, ‘I’m committed to the transition plan first, I’m committed to you second, and I’m committed to becoming the senior pastor third,’” said Smith. “If it were the reverse order, pride will sneak in because you become anxious to get into the role.”

Throughout that year they connected at least three hours every week, and that doesn’t include the hours spent together at meetings and church functions. The two made it a priority to spend social time together too. “You’ve got to be willing to spend a lot of time together,” says Smith. “Spending time together builds the relationship so that when you’ve really got a disagreement, a solid base of trust is there.”

Disagreements did occur. Smith and Schwalm admit they have different leadership styles.

“I like to make decisions quickly,” says Schwalm. “I’ll do my homework, but then I’ll draw my conclusions and ‘boom’—I’ll make my decision. David approaches things more collegially.”

“When there’s a disagreement, we’ll get behind a closed door and go at it,” says Smith. “But when the door opens, we are united and we both carry the decision together. Whoever the senior pastor is, the other is always an advocate.”

Schwalm and Smith together project a camaraderie that is infectious. There is obvious respect, but also a healthy dose of irreverence between the former and new senior pastor of Fairhaven. “Pete and I are the best of friends,” says Smith. “He’s a friend. He’s a mentor. He’s my elder. We function on all of those levels, and it’s been fantastic. I think the congregation knows that.”

Exit strategy

In January 2005, David Smith was officially installed as senior pastor. The week prior to Smith's installation, Schwalm preached a message presenting Smith's qualifications to lead the church.

"I affirmed him as a person, his family, and his gifts and skills in ministry. By the end of that sermon there could be no ambiguity in the congregation about how I felt about the transition," says Schwalm.

Since stepping back from the senior pastor position, Schwalm has remained present at Fairhaven, but not as originally envisioned in the transition plan. The plan had called for Schwalm to take the associate position vacated by Smith in the final year. But they have discovered a senior pastor's exit may not need to be as long as one's entrance.

"I really needed the senior pastor associate role in order to ramp up to being the senior pastor," says Smith. "But the associate position has been more tricky for Pete. How do you ramp down from being the senior pastor?"

Diverging from the original plan, Schwalm has not been accompanying Smith to board meetings and has not taken a "second in command" role among the staff. With his public role of preaching monthly and serving as an adviser to Smith still in place, they agreed to change his title from "senior pastor associate" to "pastor of teaching and equipping."

This adjustment has made some wonder if a three-year transition plan is really necessary.

"I guess we could have made the transition with a shorter plan, especially since David had been here for a number of years already," admits elder Tim Cornell. "But I don't think we've been hurt in any way by taking our time."

Fairhaven has a history of incorporating former senior pastors into the congregation. The pastor who preceded Schwalm in 1983 is a member of the church. Smith says having two former senior pastors still at Fairhaven has helped set precedence in terms of relational boundaries.

"Our church knows how to relate to Pete," says Smith, "because in a sense the congregation has been there before."

Lessons learned

With the transition largely behind them, the leadership of Fairhaven has been assessing the plan. Overall, they report high satisfaction with the transition experience, but lessons have been learned.

For example, board members underestimated the budgetary impact of paying for two senior pastors for multiple years.

"To be honest with you," says elder Tim Cornell, "we really didn't look at the financial costs of this transition plan before we agreed to it. Don't get me wrong, the impact has been very positive. We simply overlooked that cost."

While internal succession has worked well at Fairhaven and other large churches, some doubt it would fit smaller congregations. Beyond the need for a deeper purse, most small churches don't have staffs large enough to draw a new senior pastor from within.

Advising other churches, large or small, considering a plan of succession, Cornell says, "Ultimately the more you can think through the plan so everybody knows exactly what to expect, the better off you'll be."

Speaking to other pastors preparing for succession, Smith says humility and patience are critically important: "Pray for humility. It's going to take a lot of humility to realize a transition plan is not about you becoming the senior

pastor. It's about Christ's church and his mission. And for those who are eager to lead, there will come times when the plan just isn't going fast enough. That's going to test your patience."

Pete Schwalm is adjusting to his new roles as preacher, adviser, seminary professor, and church consultant. "Right now I'm trying to determine what God has for me after December 31 when I'm officially done at Fairhaven. Will I do some mission trips? Will I take a position somewhere else? I don't know, but this transition is right. It's good. And I feel really good about it."

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