

LESSON 12 – TRANSITION TEAM¹

The Intentional Interim Ministry (IIM) process is that intentional effort to create a learning environment and, in many cases, learning to learn again. As Argyris and Schon note about organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interactions.”² Argyris and Schon assert organizational learning occurs effectively through teams, or task forces. They contend “when something that looks like organizational learning occurs, it seems, not infrequently, to have little to do with the person at the top.”³ Instead, “we might think of clusters of individual members⁴ as the agents who learn ‘for’ the larger organization to which they belong.”⁵

Case Study – Congregational Profile

With permission, this lesson will refer to my current IIM congregation, Palisades Lutheran Church (PLC), in Pacific Palisades, California. PLC is a shrinking congregation in a part of Los Angeles that has a growing population. PLC has multiple ministry efforts in the community, an active membership, and adequate resources. I have been called to PLC to serve as the congregation’s Intentional Interim Pastor (IIP) “both to repair from past experiences and to prepare for the future.”⁶ Together we are excited to explore what learning God has in store.

Palisades Lutheran Church officially began in 1970 as the result of the merger of two Lutheran churches: Lutheran Church of the Palisades from the American Lutheran Church (ALC) and Holy Cross Lutheran Church from the LCMS. The union was “blessed” by both synodical bodies, as the two were in altar and pulpit fellowship. At the time both congregations were pastor-sized, worshipping 100 – 125 in average weekly attendance. With both congregations coming together, PLC had an average weekly attendance of 200 – 250. Each church provided its own pastor. When the ALC merged with the Evangelical Lutheran Church of America (ELCA), the PLC congregations elected to remain together; although, over time, relations with the LCMS became strained due to the significant doctrinal differences over the divinity, clarity, and reliability of Scripture. Today PLC is much more aligned with an ELCA view of theology and practice than LCMS.

Step One – One-on-One Interviews

Every IIP will join the congregational system in their own unique way and the joining will be different each time. I like to use individual member meetings to ease my way into the life of the congregation and give members access to me and the process at their discretion. These one-on-one meetings are scheduled in advance by the secretary and last for two months.

¹ According to [Convert Words to Minutes - Speech Calculator \(Free\) \(speechinminutes.com\)](https://www.speechinminutes.com/) this document should take 59.6 minutes for the average reader (130 wpm).

² *Ibid.*, 15.

³(Argyris and Schön 1978), 7.

⁴ For example, the Transition Team.

⁵ (Argyris and Schön 1978), 7.

⁶ “The unique time between pastors” is a term of art quoted from the Intentional Interim Ministry Agreement.

During the one-on-one interviews, I prayerfully identify transition team candidates. Good candidates will help make a good team. The goal is to identify individuals who are self-defined and represent diverse and even opposing viewpoints. While identifying Transition Team members is part of the interviewing process, it is secondary to providing pastoral care, listening to the many stories, and “joining” the congregational system. These meetings can function as an “emotional release valve” for a congregation in grieving the loss of a departed pastor or facing conflict or trauma.

The meetings are facilitated using the one-on-one interview questions, the emotional thermostat, and the organizational chart. These meetings culminate in a 1st Quarter Report. In the report, I attempt to echo back to the congregation what I heard them say about themselves. The report also functions as a resource manual for the congregational self-study and transition team. The 1st Quarter Report includes the members “Top 10 Concerns,” a prioritization chart, recommendations for cottage meeting topics, and the organizational chart activity.

The 1st Quarter Report was shared with all the members and stakeholders of Palisades Lutheran Church (PLC), the Pacific Southwest District (PSD)⁷ of the Lutheran Church Missouri Synod (LCMS), and the Lutheran Congregations in Mission for Christ (LCMC). It will be used by the Transition Task Force (TTF) as the primary resource document for leading the congregational self-study (IIM Phase Two) over the next six months.

Step Two – Town Hall Meeting

The town hall gives the congregation an opportunity to “affirm” or “improve on” what I heard them tell me in the one-on-one meetings. In this way there is a continuous process of meshing the various stories into a cohesive narrative. A town hall meeting (held online at two different times to enable members to find time in their schedules) allowed PLC members to reflect on the 1st Quarter Report and offer feedback.⁸ Many members met with me individually, and many email conversations were held, to discuss the impressions of the 1st Quarter Report. The 1st Quarter Report, cottage meetings⁹, and other feedback were helpful in defining the relationships of core ministries to each other, to individual members, and to the congregation as a whole. The feedback was also instrumental in assessing the results of the online survey.

Introductory remarks at the town hall meeting held over Zoom:

In preparing the IIM 1st Quarter Report, my objective was to be a faithful lens, describing Palisades Lutheran Church as the members see it – the themes and narratives reported by members as important to them. PLC members graciously took the time to provide over 25 pages of feedback and questions to the 1st Quarter Report, which we are going to discuss in this 90-minute Town Hall meeting. We are not going to be able to answer every question you may

⁷ See Appendix 29 for Pacific Southwest District President’s 1st Quarter Report feedback.

⁸ See Appendix 27 for Town Hall meeting Questions and Answers sheet. The members were invited to email any questions between the delivery of the 1st Quarter Report on May 7, 2021, and the Town Hall meetings on May 17 and May 20, 2021.

⁹ See Appendix 28.

have today, but we will make best efforts. However, every question that has been submitted is included below, either directly or as a compilation of multiple questions. The first 45 minutes will be dedicated to introductions, 5:30 minute video, and reading through 25 written questions and answers. The remaining 45 minutes will be open for additional questions and/or comments. Please feel free to type your questions and/or comments in the chat box. The Town Hall will be recorded and available for those unable to attend. Any comments in chat will also be recorded. Finally, this written Q and A sheet will be made available to the members and friends of PLC.

Step Three – Formation of the Transition Team

The PLC Church Council and I each selected six Transition Team members. An invitation letter is sent to each of the candidates. The letter describes why the candidate was selected, the purpose, process, and time commitment. When the team has been assembled, they are formally installed during a worship service and the training begins. In the same way, when their work is completed, Transition Team members are formally released during a worship service and thanked for a job well done. Since the Transition Team was assembled by my initiation, the team reports directly to me and I report directly to the Council. More on the communication of the transition team’s activities to the congregation is in Appendix 11.

Step Four: – Transition Team Introduction & Training

The Transition Team normally receives five weeks of training. Please refer to the IIM Process Map from Lesson 9 – Organizational Learning for details on the sequence and examples of the training topics. In brief, the size of the group will range between 9 – 12 members. This allows me to divide the Transition Team into three smaller teams (or “clusters”). Each team will select one of the recommended learning topics based on the members’ Top 10 Concerns identified during the one-on-one meetings. I provide resources and work with each team to come up with an agenda for their cottage meeting series.

Step Five – Cottage Meetings

Each of the three sub-teams of the Transition Team will host a cottage meeting series during a single month. The team will offer the same cottage meeting topic at three different times to give members an option that fits their schedules. The cottage meetings consist of two parts: a Bible study and a learning module. The Bible studies are usually selected from the “Temporary Shepherds: A Congregational Handbook for Interim Ministry” book “Part 4: Tool 2.” Offering three cottage meeting series works well with the books layout of Bible studies: for the past, “Who and Where We Were”, for the present, “Who and Where We Are Now; and for the future, “Who we Can Become and Where Can Go.”¹⁰ An example of a learning module would be the timeline activity (see Appendix 16).

¹⁰ (Nicholson 1998), 146 – 164.

Step Six – Transition Team Final Report & Recommendations

It will be necessary for the leaders to report out to the congregation what they have learned. What to do with the learning? If the findings are taken seriously, several conversations should now take place with the rest of the congregation. The congregation should come to terms with their history. The congregation should evaluate their current governance model and staffing configurations and assess the options. The congregation should explore what their Vision for ministry is. These questions will all be addressed through the congregational self-study.

QUESTIONS¹¹

INSTRUCTIONS: PLEASE COMPLETE THE FOLLOWING QUESTIONS ON A SEPARATE SHEET OF PAPER.

INDIVIDUAL (PRIOR TO CLASS)

1. FROM WHAT YOU HAVE LEARNED SO FAR IN BASIC EDUCATION, WHAT TOOLS WOULD YOU USE TO HELP THE CONGREGATIONAL SELF-STUDY PROCESS?
2. HOW CAN THE TRANSITION TEAM BE USED TO HOLD AND PROMOTE THE LEARNING ENVIROMENT?

GROUP (DURING CLASS)

1. DESCRIBE A TIME WHEN YOU PARTICIPATED IN A CONGREGATION-WIDE LEARNING ACTIVITY.
2. DESCRIBE A TIME WHEN AN OUTSIDE MINISTRY CAME ALONGSIDE YOUR MINISTRY TEAMS TO PROVIDE ENCOURAGEMENT AND POSSIBLY ADVICE TO IMPROVE MINISTRY. HOW WELL DID THE PROCESS WORK? WHAT MEASUREMENTS WERE USED TO DETERMINE IF LEARNING OCCURRED?

¹¹ Allowing six minutes per question this section should take roughly 30 minutes.

APPENDIX 1 – ONE-ON-ONE INTERVIEW QUESTIONS

(ADAPTED FROM NALIP MANUAL)

(Instructions: I am encouraging every member, or friend, of the congregation who schedules a meeting with me to please complete this interview tool. Not only will it help inform our meeting it will provide me a reference point for reporting to the congregation various themes and patterns which emerge from within the congregation.)

1. What do you see as the three major concerns your congregation has during this pastoral transition?
 - a.
 - b.
 - c.
2. What would you like to see accomplished during the next six months?
3. What steps are necessary to take in order to meet any or all these goals?
4. What do you see as some of the strengths of your congregation?
5. In what areas does your congregation need to make improvements or do better?
6. In what specific ways do you want the interim pastor to support you during this transitional period?
7. What are some specific ways you intend to support the interim pastor?
8. What are your feelings about the future of this congregation?
9. What are some of the attitudes expressed by the members about the congregation's life and mission?
10. Name any trends you have seen occur since your former pastor left?
11. What is your involvement in this congregation? (Past and present)
12. Are there any other concerns/issues you would like to mention here?

APPENDIX 2 – EMOTIONAL THERMOSTAT

1) When completing the “Emotional Thermostat” as part of the one-on-one interviews...

- **Three (3)** people responded: “Highly distressed; personal faith and congregational life feels compromised; continued membership in doubt.”
- **One (1)** person responded: “Very distressed; I’ll have to wait and see.”
- **Two (2)** people responded: “Feel very distressed: am participating in this process to help myself and our congregation with the healing that needs to be done.”
- **Five (5)** people responded: “Am moderately distressed about events at our church, yet...”
- **One (1)** person replied: “Am still somewhat upset, need healing time, but will continue to participate.”
- **Three (3)** people responded: “Am okay but will need time with new leadership.”
- **Five (5)** people responded: “Am okay about things and look forward to new leadership and mission.”
- **One (1)** person responded: “Doing quite well, thank you, and looking with excitement to our future mission.”

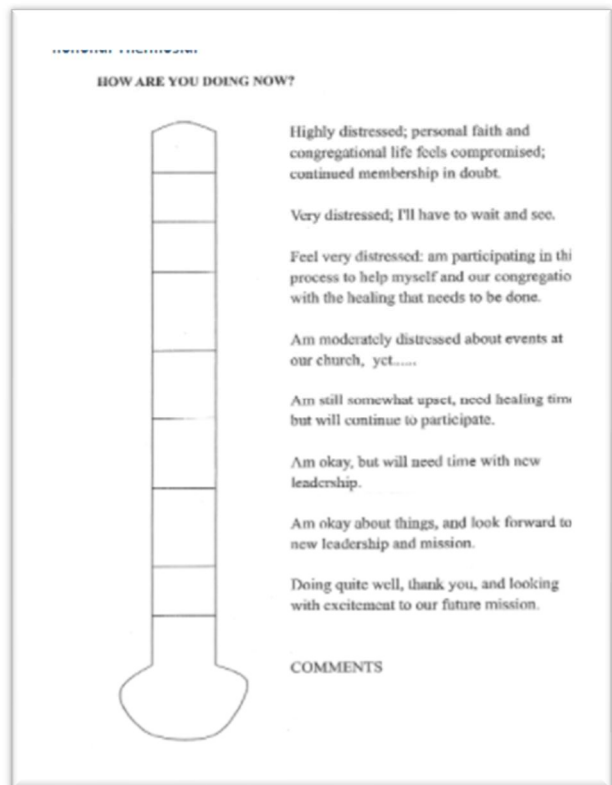


Figure 1 - Emotional Thermostat

- 2) “Stabilization of membership so we don’t lose more members.”
- 3) “We need to open up from being a country club like church to a missionary church that speaks to you and young people.”
- 4) “Give me and my wife motivation to stay in PLC.”
- 5) “I need to feel comfortable and cannot do so with some members mindset.”
- 6) “It is in trouble. A declining and aging congregation.”
- 7) “The downward membership trend predates Pastor Davis.”
- 8) “Part of the pruning is God’s plan. We have to trust God.”
- 9) “Concerned about losing membership and keeping good people involved.”
- 10) “Growing an interested and eager participation of ‘new recruits.’
- 11) “I have rather bad feelings that we will not have a future.”

- 12) “Very capable and devoted people, though numbers are dwindling. Excellent physical buildings and space.”
- 13) “We need to move closer to 150 members than 50 (it would be ok to go to over 150 but I doubt it happens).”
- 14) “Uncertain about future. Membership has declined over the past 25 years.”
- 15) “We are vibrant, diligent & very much alive, but also an aging group. That said, we need to figure out how to attract members of all ages, adults & children alike.

APPENDIX 3 – IIM 30-DAY REPORT

Palisades Lutheran Church, LCMC-LCMS, March 1, 2021

If you have not already, please schedule your one-on-one interview with me so your voice can be heard and reflected in this learning process.

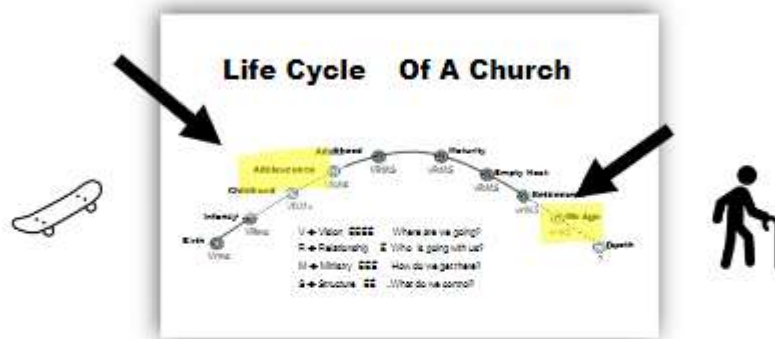
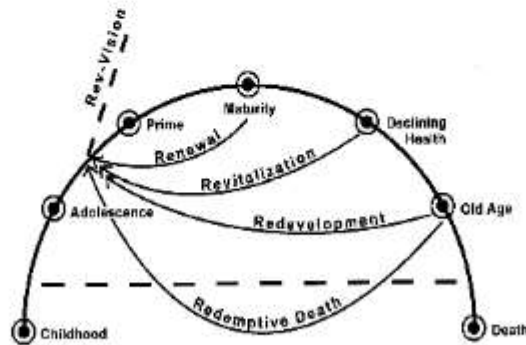


Figure 1 - Congregational Life Cycle Theory



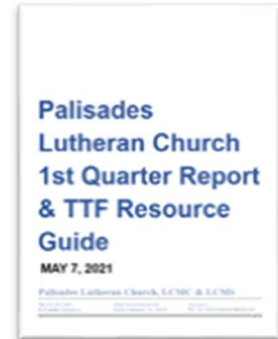
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Rev. Martin E. Lee, IIP
Intentional Interim Pastor

APPENDIX 4 – IIM REPORT MONTH TWO – APRIL 14, 2021

Purpose

Intentional Interim Ministry (IIM) is provided for the unique time between pastors both to *repair* from past experiences and to *prepare* for the future. IIM includes perspectives that are derived from systems thinking and organizational learning and stewardship. The only persons who can make fundamental change in a system are the people involved in the emotional process themselves. Although the Intentional Interim Pastor (IIP) has adaptive leadership skills, tools, and techniques to encourage it, the change that needs to happen comes by God’s grace to the Congregation from the inside out – not from the outside in.¹ In preparing the IIM 1st Quarter Report, my objective is to be a faithful lens, describing the church as it is seen by the members – the themes and narratives that are important to you.



Participation

Dear Members of Palisades Lutheran Church, thank you for your participation. It adds to the collective learning process. I arrived on Monday, February 1, 2021 and it has now been 3 months (at 4/5 time) since we began this journey together. Special thanks to Palisades Lutheran Church staff, lay-leaders, and members who have worked diligently to gather data, fill out surveys, attend focus group meetings, and provide proof reading² to deliver an accurate document for PLC’s congregational self-study and continued learning.

Content in the *1st Quarter Report* has been assembled from 51 one-on-one member interviews, three Council meetings, three Elder meetings, one Youth and Family Ministry Team meeting, six congregational Bible studies, four staff meetings, more than fifty telephone conversations and hundreds of texts and emails with individual members. The following internal documents and survey results have been consulted:

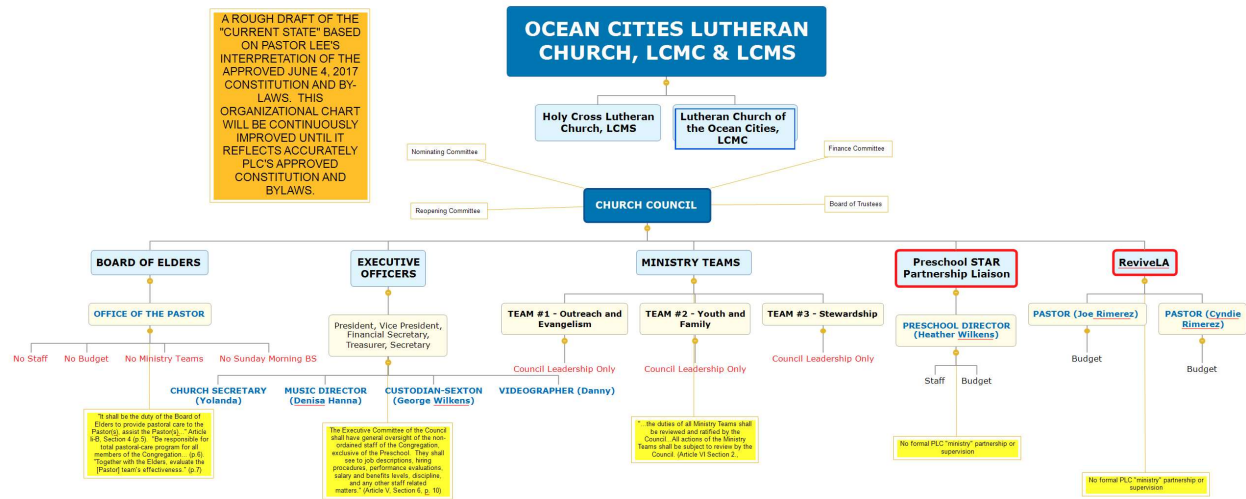
1. **Palisades Lutheran Church By-laws** (“Most Recent Amendment June 4, 2017”).
2. The STAR Preschool Agreement – 2020 – 2021 “At Palisades Lutheran Church.”
3. **Palisadian-Post** – “**Out of the Past**” article, dated February 11, 2021.
4. **Synthesis of all 5 Elders small group** meetings held in October and November 2019 and Elders summary delivered December 2019. (“Snapshot of history of PLC including conflict history.”)
5. A Questionnaire of 12 questions from Rev. Kenneth Davis to Rev. Wally Mees.
6. An Update on Children’s Church from John Hellmuth dated March 1, 2021.
7. Desired Outcomes of Intentional Interim Ministry at PLC submitted by the Council and Elders on October 20, 2020 to Rev. Martin Lee, IIP and the Pacific Southwest District of the LCMS.
8. The LCMS Church 10-Year Statistics and Records for PLC.³
9. PLC’s annual income statements from 2011 – 2020 and PLC Financial Notes
10. Leadership Survey – Gospel Impact & Stewardship Tool (GIST) for strategic ministry planning.

Document Summary

The *1st Quarter Report* is intended to be a resource for the members and stakeholders of Palisades Lutheran Church (PLC), the Pacific Southwest District (PSD) of the Lutheran Church Missouri Synod (LCMS), and the Lutheran Congregations in Mission for Christ (LCMC). It will be used by the Transition Task Force (TTF) as the primary resource document for leading the congregational self-study (IIM Phase Two) over the next six months. In fact, it is now a historical document of PLC. This report is divided into two sections:

- **Section I: PLC Top 10 Concerns (ministry priorities)** – This is a major part of the report, making up nearly two-thirds. The structure is give-and-take. The members give their responses to various questions and receive adaptive feedback from IIP. This entire section is guided by the “Top 10” member concerns. Remember, **God promises** He is working through “*all things*,” withholding nothing, so that your joy might be made complete (John 15:11).
- **Section II: Recommendations** – In this section I recommend four topics for congregational learning. Together, we will seek to create communities of interest around these topics. Dr. Karl Albrecht observes, “The combination of an effective thought leader and a well-focused community of interest can often accomplish more than the various silos can achieve acting in isolation.” May God and His Word lead our thoughts and actions that we may “*throw off everything that hinders*” and “*run the race marked out for us.*” (Hebrews 12:1).

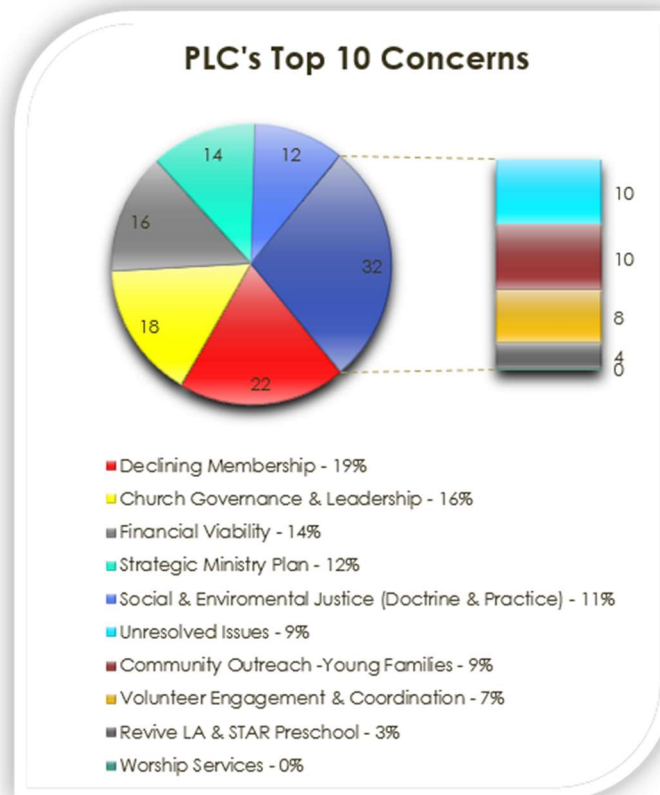
APPENDIX 5 – ORGANIZATIONAL CHART



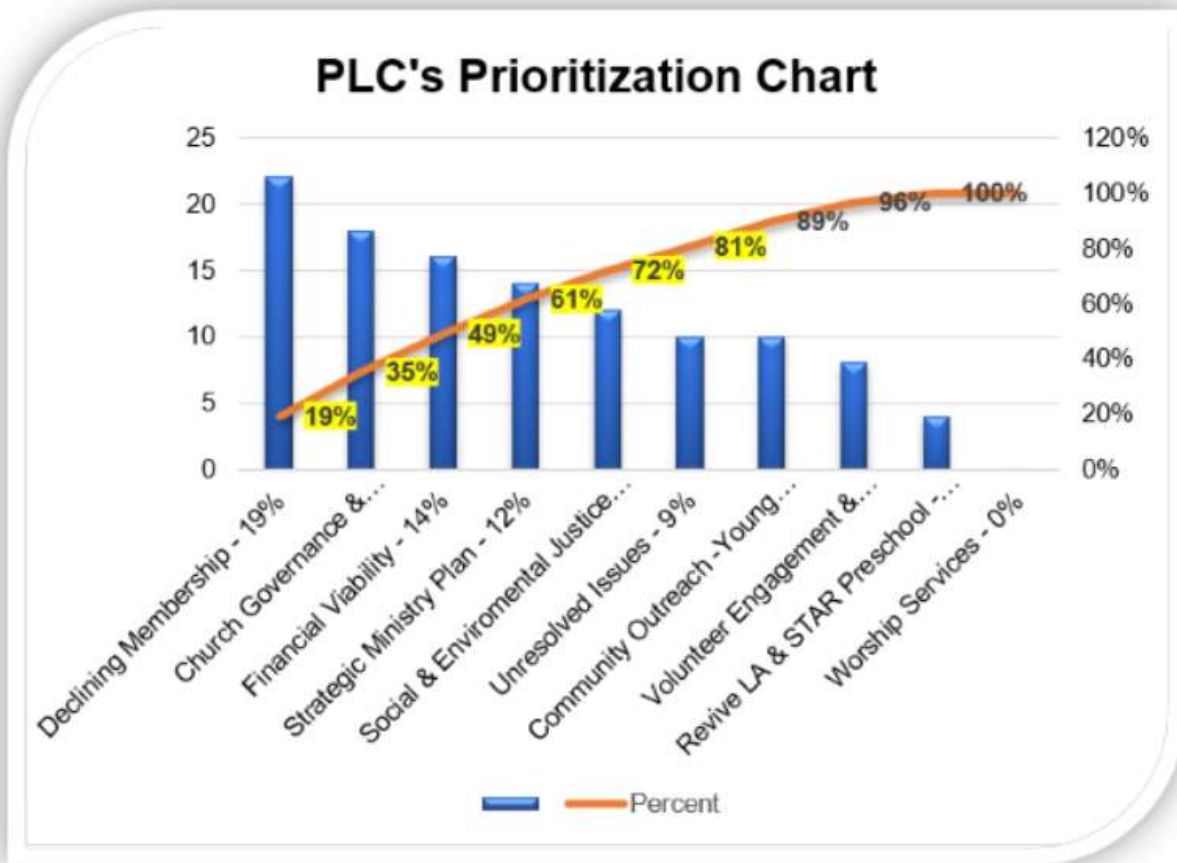
APPENDIX 6 – PLC’S TOP 10 CONCERNS

Be confident and do not fear! “He will never leave you nor forsake you. Do not be afraid; do not be discouraged” (Deuteronomy 31:8). When addressing matters of concern for congregational members, it can get discouraging fast! We need to take a deep breath and remember that God is still God and knows what He is doing. Some members are ready for the roller coaster ride! One member commented: “Let them (The Palisades) know we’re alive.” The same person continued, “Be patient, calm, kind...clever?” concluding that PLC members can stay future-focused and hopeful. To that encourager, we say: “AMEN!” God intends to redeem this time between settled pastors. So, buckle up! BIG Hairy Audacious (and Divine) Goals ahead!

When asked the one-on-one interview question, “What do you see as the three major concerns your congregation has during this pastoral transition?” the top six member responses were: *Declining Membership, Church Governance and Leadership, Financial Viability, Strategic Ministry Plan, Social Justice and Environment Issues, and Unresolved Issues.* The chart below reflects the cumulative responses.



APPENDIX 7 – PLC's PRIORITIZATION CHART



APPENDIX 8 – 1st QUARTER REPORT RECOMMENDATIONS

RECOMMENDATION #1 – CHURCH GOVERNANCE AND LEADERSHIP (pgs. 11 – 18)

Become aware of church governance options with leadership styles that make sense for PLC. Choose and implement the church governance model and leadership style, faithfully and in Christian love.

RECOMMENDATION #2 – STRATEGIC MINISTRY PLAN (pgs. 22 – 30)

Identify a ministry Vision for PLC. Utilize the Gospel Impact and Stewardship Tool (GIST) to create a ministry map around PLC's core ministries. Facilitate group discussions to evaluate strategic imperatives, and vote on a strategic ministry action plan.

RECOMMENDATION #3 – SOCIAL AND ENVIROMENTAL JUSTICE

(Doctrine & Practice) (pgs. 31 – 36)

Review Appendix A and add a column for the LCMS. Study PLC's doctrinal and denominational identity. Study the Commission on Church Theology and Relations (CTCR) document titled: "Render Unto Caesar...Render Unto God: A Lutheran View of Church and State." Facilitate group discussions on the complexities involved in matters of conscience and to appreciate the similarities and differences between divine and social activism.

RECOMMENDATION #4 – UNRESOLVED ISSUES (pgs. 38 – 46)

Identify and address patterns that prevent PLC from *coming to terms with history*. Facilitate conversation to aid in repairing from the past and preparing for the future. Work through the grief/change process in a positive and constructive manner so that healing may begin.

APPENDIX 9 – PSD DISTRICT PRESIDENT’S FEEDBACK ON MAY 12, 2021

Martin,

I finally had the time to do a thorough read on your report (the benefit of resuming travel and hotel-time). Wow – you have been busy! Your observations, summaries, and recommendations are excellent. I believe that your ability to quickly and clearly “see” the challenges and opportunities at PLC is evidence that the Holy Spirit definitely brought you to this group of saints for such a time as this. Thank you for your honesty and relational ability to say the “hard things” with grace. While I know that “Blanks” presence and influence can be challenging, I am also thankful for your grace-filled approach.... (Personally, I’d like to put in an order for another 10 “Marty Lees” to strategically assist congregations who desperately need to find a way forward.) [Left in to provide a District President’s affirmation of the IIM process and need for IIP’s.]

Please know that I am very willing and available to participate with you and PLC whenever you feel it is helpful – or to stay away if that is the most helpful thing I can do. It was clear to me early on in my DP tenure that there is a significant mistrust of LCMS and District from the past. I pray that the meetings and conversations I’ve had prior to your arrival cracked open the door for improvement in the relationships between PSD and PLC. I am confident that your competent leadership will continue enable the difficult conversations to happen, bring unity in faith and practice, and prepare them to see what God might have for them.

Thank you for saying, yes to the challenge and opportunity at PLC.
Be sure of my continued prayers and support.
In Christ,
Mike

APPENDIX 10 – TOWNHALL MEETING Q & A – MAY 14, 2021

Dear PLC Members, [shortened version original had 25 questions and answers]

It is another beautiful day that the Lord has made, here in the Palisades! A big thank you to everyone who participated in the one-on-one interviews, completed the surveys, and are now engaging the content of the 1st Quarter Report. Hopefully, it is a good reflection of the items that are important you. There will be places that the “stories” do not seem “accurate.” That is okay, since the stories were told from diverse viewpoints. Over the next six months, through a thoughtful IIM process, we will have a chance to clarify and define our stories to be well-prepared for committing to directions and beginning the Call process for PLC’s next settled pastor

Please join me for a 1st Quarter Report Town Hall meeting on Monday, May 17 at 7pm. If you are unable to make it at 7pm for the main event, I will host a smaller session at 1pm that same day. The Town Hall will be an opportunity to give a general overview of the 1st Quarter Report and what to expect from IIM Phase Two – “Congregational Self-Study. In preparation for the Town Hall, please read the below general questions and answers.

1. What is the purpose of the 1st Quarter Report?

The primary purpose of the 1st Quarter Report is to promote spiritual maturity through congregation-reflection and congregation-awareness. The time between settled pastors is often referred to as a “pregnant moment”: a time when the congregational system is open to change. The 1st Quarter Report is meant to identify the varied opportunities for transformative and positive change that may help prepare PLC for a new future with a new pastor. The goal is to get the members of PLC into conversation, talking with each other in a way PLC member do not normally converse. The key is for PLC members to do the learning so that PLC benefits.

2. Will the Transition Task Force-led self-study address any unresolved issues with our departed pastor(s)?

Yes and No. The congregational self-study is not meant to get stuck on any of PLC’s departed pastors (i.e., not event- or person-focused). Instead, the goal is to discover opportunities for PLC to learn about their own behavior and congregational life. How PLC interacted in the past, and interacts now, with each departed pastor communicates something. PLC will want to explore what that “something” might be. These past ministry partnerships can be used to inform us of possible dangers to avoid, or blessings to seek. Always striving to discover new learning improves congregational life, not just for current members but for new members, too. Every conflict is an opportunity to put our faith

into practice. Our lives as Christians, Luther says, are characterized by repentance and forgiveness. This process should promote Christ's redeeming and healing power through God's grace and the work of the Holy Spirit. The goal is to mature as a body of Christ so that both the congregation and the departed pastor will speak in ways that build up the other's good name and reputation.

3. Why spend 6 months conducting a congregational self-study?

A benefit of the congregational self-study is the opportunity to engage all the members and recruit PLC's best thinking. Everyone moves at a different pace. Giving the process 6 months allows all members and friends of PLC a chance to participate, digest, and take ownership of the process. If some unilaterally sprint ahead of the process, they may unintentionally shut off dialogue and communicate to others that their input is not of value. This type of bottle neck in communication causes what systems theorists refer to as a "closed system."

4. What is the purpose of the Transition Task Force (TTF)?

The TTF is the lead learning team for the congregational self-study. TTF members will become familiar with the key challenges facing Palisades Lutheran Church. They will learn several key "teaming" and "learning" concepts. The TTF members help facilitate the learning process by focusing on several "research questions" related to their group's focus task (e.g., Church Governance and Leadership, Strategic Ministry Plan, Social and Environmental Justice, Unresolved Issues). The TTF will host the cottage meeting series in July, August, and September. They will gather data and translate their "findings" into a TTF Final Report and Recommendations to be delivered at the end of October 2021.

In recent decades there has been significant research on the use and effectiveness of teams. In the selection process of TTF members, I encourage "Thought Leaders" to be identified; that is, those people who are willing to reach intellectually beyond the organization's norm. Dr. Karl Albrecht, author of "Organizational Intelligence and Knowledge Management: Thinking Outside the Silos," says of thought leaders, "Their breadth of view, conceptual skills, and ability to see through the fog of argument and discern the few really key variables and priorities in situations makes them unusually effective in whatever jobs they are assigned."

My objective was to establish an "Ad-hocracy" by putting the TTF together. Sometimes a difficult or intractable organizational issue requires a special "hit squad" to solve it. Many organizations use ad-hocracies: specialized and transitory teams, task forces, committees, or advocacy groups assembled to attack an objective. Ad-hocracies tend to be most effective when they are few, small, well-focused, led by competent thought leaders, and politically powerful (p. 59, 1st Quarter Report).

- 5. *Recommendation #4 suggests PLC has six unresolved issues. I am not sure what you are talking about! Relationships and ministry have been working brilliantly. Our motto is: “One in Spirit.” We have no unresolved issues. Can’t we just move on to calling the next pastor and get on with life?***

I would not know about these six unresolved issues if members had not told me about them. Some members insist, “There is nothing to see here,” while other members say, “We have lots of problems, both operationally and spiritually.” If PLC leaders continue to shut down dialogue and not allow for different viewpoints, no learning will occur, and the congregation (organizational system) will remain effectively stuck. Many systems specialists refer to this organizational trait as homeostasis (efforts to keep everything relatively the same). Additionally, members who have been hurt by unresolved issues will continue to feel neglected and may find their needs met better elsewhere. I imagine that the enumerated issues are far more important than the 1st Quarter Report reflects since many past members who have left the church may have left due to one or more of these unresolved issues but are not present to make these concerns known. There will be some factual items people can/must agree on, but there are other items that are open to interpretation or derived from different experiences. It does not help to say other PLC members are wrong.

- 6. *How should we respond to Pastor Lee’s suggesting we decide on what category size is the best fit?***

The first thing you will want to do is slow down; take no action. Instead, study the characteristics of the various size categories and discuss widely which ones best reflect PLC currently. Peter Senge identifies “the illusion of taking charge” as a common organizational learning disability. Instead, recruit the ownership and buy-in of the congregation. Over-functioning by a few is a recurring characteristic of PLC. Too many current PLC leaders chase the ball and front-run the process. Leaders should create space for TTF members to rally the resources and best thinking of the whole congregation to design a path forward.

- 7. *Is the Report suggesting which core ministries to keep and which give away or close?***

No. The visual map highlights areas for improvement. We do not want to pre-empt the TTF self-study. The use of the term “ministries” is in a broad sense. Any activity that occurs on the PLC campus, using the Lord’s resources, with significant impact is eligible for consideration as a core ministry depending on how much space, time, or energy it consumes. STAR Preschool is not formally a “ministry” of PLC, but it probably has the single greatest programmatic impact on site. Probably no other ministry has more foot traffic or drive thru traffic than STAR Preschool. No other ministry uses more space, five days a week. Therefore, it

would be negligent to not include STAR Preschool in the Gospel Impact Stewardship Tool (GIST) analysis.

Discussions about mission impact are often difficult since every ministry is important to someone. While this may be true, each ministry has different levels of current and potential Gospel impact. Without wanting to criticize worthwhile programs, PLC will want to assign each ministry to one of four groupings: invest and grow, keep, and celebrate, keep watering, and close or give away. This mapping processing will help PLC decide how to steward resources for both strategic Gospel impact and financial viability.

8. Are we going to run out of funds? How can we afford a full-time pastor?

Part of the planning process will be to review the strategic ministry plan, not only the ministry plans in relation to each other (mission and cost), but also a complementary staffing configuration plan. It may be the ministry model and strategy require two new hires on staff and a part-time versus full-time pastor. But who knows at this point? I sure do not. But the congregation can only do what the funds the Lord provides permit.

9. How successful has Pastor Lee been in prior IIM assignments?

I have been 100% successful in facilitating the IIM process and tasks in the congregations I have been called to serve. How much learning occurs and what congregational leaders and members do with that learning is up to you.

10. What is next? What is needed from us?

God works in many and various ways. The best thing we can all do is be open to other people's perspectives, the process, new learning, and new thinking – promote a healthy immune system. Jesus says, “Do not be anxious about anything, but in everything by prayer and supplication with thanksgiving let your requests be made known to God. And the peace of God, which surpasses all understanding, will guard your hearts and your minds in Christ Jesus” (Philippians 4:6 – 7).

APPENDIX 11 – TRANSITION TEAM INTRODUCTION LETTER

April 17, 2021

Dear PLC TTF Candidate:

You have been selected given your special gifts and abilities to prayerfully consider joining a “temporary” ministry team called the Transition Task Force (“TTF”). This group of twelve will lead the Learning Phase for PLC over the next six months. The time most TTF members commit to this ministry is roughly eight to ten hours per month. This includes email communications, team meetings, and cottage meetings. Below is a detailed description of the duties and responsibilities of the TTF.

I hope the team will begin training in early May. They will then launch a series of cottage meetings during the months of June, July, and August. By September, the TTF will have completed the cottage meeting series and will write the final report and recommendations. By the third week of September, a rough draft of the report will be “socialized”. By October 1st the TTF Final Report and Recommendations will be distributed to the congregation. During the second week of October I will host a townhall to review the report and discuss the implications of each recommendation. Within two weeks of the townhall a special voter’s meeting will be held to vote on the TTF Recommendations.

The opportunities for learning and adventure will be plentiful. Our prayer is that God use each of you and this learning process in a mighty way to assist Palisades Lutheran Church to better understand His mission and vision for ministry in the Palisades. The better PLC knows themselves the easier it will be for PLC and pastoral candidates to discover whether they would be a good match in ministry!

Please prayerfully consider this invitation and confirm your availability with me. Please let me know by Saturday, May 1, 2021.

+ Grace and Peace +

Rev. Martin Lee, IIP

THE TRANSITION TASK FORCE TEAM (TTF)

The TTF can be a valuable leadership group in the congregation which is in pastoral transition. The selection of its membership is an important task of the Intentional Interim Pastor (IIP), Elders and church governance board (BOD or Council). The IIP will select six members and the lay leaders will select the other six. The candidates should not be on a current leadership board. This will encourage new leadership to emerge. The TTF will serve the congregation best if its membership is a representation of the diverse viewpoints and if the members are emotionally and spiritually mature. The work of the Team will take time, energy, and commitment.

The TTF will focus the development of spiritual and relational growth among the members and lay leadership within the congregation. The Team will help engage the membership of the congregation in their own developmental tasks of congregational assessment and goalsetting. The goal is for the congregation to learn together, as the body of Christ, and be better defined to Call the next pastor. Although the IIP will provide recommendations and help to equip the leadership and to assist, guide and facilitate the learning process and the team, the work of this interim journey is to be accomplished by the membership of the congregation. The TTF ministry team can, therefore, help the leadership understand the congregation to be truly the Body of Christ in this place and to be a “learning organization”.

The following paragraphs provide a brief summary of the full Manual (“Temporary Shepherds – A Congregational Handbook for Interim Ministry”) for the TTF Team, which has been developed over the years at the “grass roots” level in congregations. The process has been used in thousands of congregations throughout the world. Pastor Lee has customized the process in places to fit your congregational needs. The life of the congregation, and the individual members, is dynamic, your situation will determine the details of this transitional journey and process. Nevertheless, you will discover in the journey the work of the Holy Spirit as your Team prays, discusses, shares, discovers, and develops together the renewing life of your congregation in a new identity and ministry.

- A) *Based on Pastor Lee’s listening sessions with the members during the “Joining Phase” he will prepare a 1st Quarter Report. In the report he will identify 3 – 5 areas of ministry he heard the congregation collectively say need attention. With Pastor Lee’s guidance the TTF will select three focus areas for the congregational self-study.*
- B) *The second phase of the IIM is the “Learning Phase”. This is the longest and probably most important phase. This phase is guided primarily by the Transition Task Force, a group of 12 spiritually and emotionally mature members. A chairperson will be appointed, typically by the IIP. A vice chair and recording secretary may be appointed by the group. The Chairperson may appoint three team leaders for each of the focus areas.*
- C) *The TTF chairperson and the three focus teams will determine the regularity of their meeting schedule, and where and how to host the three “Cottage Meeting Series.” Ideally, each TTF sup-group will host three Cottage Meetings per month in their series (i.e. weeknight, Saturday morning/afternoon, and Sunday afternoon). The goal will be to focus on one key ministry area per month and invite the whole congregation to attend one*

Cottage Meeting per series. The meetings may be held at the same location or rotate. The duties/responsibilities during the event may be shared or a single leader may be designated at each meeting.

- D) *The TTF chairperson will report regularly, written or in person, to the church council (and members) and establish with the council an agreed upon timeline to complete its' work. The **TTF Final Report and Recommendations** will provide guidance in the Calling process of new pastoral leadership. Also, the Final Report and Recommendations may be used by the Church Council to confirm or help improve any existing strategic initiatives seeking to achieve the congregation's Vision.*
- E) *Each TTF sub-group leader will guide their team in promoting a learning environment first for the team, and then, the congregation collectively. Each sub-group will assess the member feedback information and develop proposed recommendations. Each sub-group will keep minutes at their meetings and submit findings, recommendations, and proposals to the TTF chairperson.*
- F) *Typically, each sub-group will assign the following four roles to their members: (1) a **Facilitator**; (2) a **Host**; (3) a **Process Observer**; and (4) a **Timekeeper**.*
- G) *It is recommended that at least two members of the 12-member TTF be appointed to the Pastoral Call Committee.*
- H) *The affirmation and/or recommended congregation approved revisions in various ministry areas, such as: Mission and Vision, staffing configuration, governance, ministry design, finances, etc. will give guidance and appropriate parameters for a Pastoral Call Committee to accomplish its charge.*
- I) *It is helpful to keep in mind that the five IIM developmental tasks (see Pastor Lee for the handout) are the work of the congregation, and the management (promoting and facilitating) of the overall process is the responsibility of the intentional interim pastor (IIP).*

I. Reporting and Commencement/Closure

A) Reporting –

- **First**, Pastor Lee created the TTF and is therefore responsible for the actions of the team. The TTF should seek Pastor Lee's guidance in the development and review process of the report and recommendations prior to reporting out.
- **Second**, each of the three sub-groups should have an appointed team leader who provides a written summary of their group's findings to the TTF chairperson.
- **Third**, the TTF chairperson will be responsible for working together with the members of the Team, and Pastor Lee, to develop the Final Report and Recommendations along with minutes and all other materials gathered during their operation.
- **Fourth**, once the entire team, and Pastor Lee, agree the document is complete it should be submitted to the church council and District for feedback.
- **Fifth**, once it has been appropriately "socialized" and any document revisions have been made the TTF Final Report and Recommendations should be made available to the

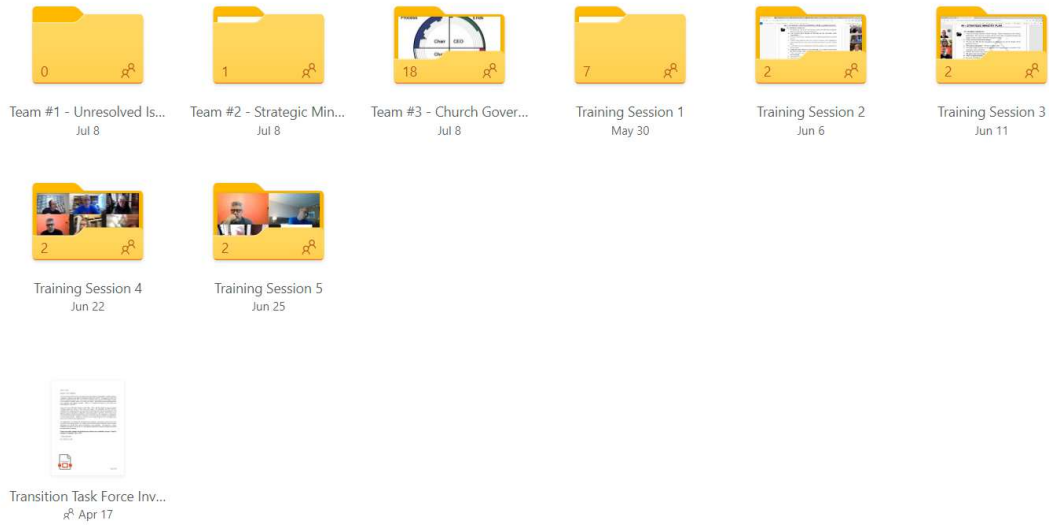
church members upon request, emailed, posted in a public place, and generally published widely for membership use.

- B) **Commencement / Closure** – Such ceremonies may be done in the context of a worship service during which the members of the TTF may be formally recognized in duties and members are able to see the visible signs of activity. The closure may be done in the context of a worship during which appreciation is expressed for everyone's contributions that have resulted in an accurate profile of the congregation and an exciting vision of its future. Following the service, a special fellowship hour could celebrate what has been accomplished.*

Thank you for your consideration to lead your congregation in this next chapter in the divine adventure God has planned for you and Palisades Lutheran Church!

APPENDIX 12 – TTF TRAINING FOLDERS

... IIM > IIM ASSIGNMENTS > PALISADES - PACI... > TTF



... IIM ASSIGNMENTS > PALISADES - PACI... > TTF > Training Session 4



APPENDIX 13– CODE OF CONDUCT¹²

Transition Task Force (“TTF”)

1. Worship and pray regularly and diligently together. Build one another up in the body of Christ both in word and deed. (Romans 13:8 – 10)
2. Appropriately express dissent. (Proverbs 27:17, Acts 15:1 – 2, Titus 3:10, and 2 Timothy 3:16 – 17)
3. Group discipline simply works better if all the members agree to help each other maintain the standards set.
4. Understand that being part of a disciplined team makes an individual’s attempt at exercising governing powers away from the group illegitimate.
5. A time-honored practice is that a group of leaders will speak and lead with one voice.
6. Enforce the agreed upon rules when they are violated.
7. Support the governing leaders when they undertake to ensure group discipline.
8. Members will support the legitimacy of a final determination of the TTF on any matter, without regard to the member’s personal position on the issue.
9. Members will be properly prepared and participate in deliberations.
10. Privacy and confidentiality a must.

Signature of Member

¹² “Behavioral Covenants in Congregations: A Handbook for Honoring Differences,” Gilbert R. Rendle.

APPENDIX 14 – TTF FOLLOW-UP LETTER

Further Advice for TTF Member Roles in Planning and Facilitating Cottage Meetings

July 30, 2021

GROUND RULES

- Avoid front-running the member's opportunity to participate during the Cottage Meetings.
- Suspend personal opinions and your recommendations in order to promote dialogue.¹³ (The time will come for your personal opinions to emerge.)
- Promote opposing viewpoints with confidence and curiosity, have fun!
- Do not presume, or predetermine, desired outcomes.
- Assume a "Research Posture" from the "Balcony". Try to see the congregational life, and viewpoints from a variety of vantage points no matter how insignificant, diverse, or problematic the viewpoints may be.
- Be "Thought-Leaders" – "Be willing to reach intellectually beyond the organization's norm... See through the fog of argument and discern the few really key variables and priorities in the situation." Where can learning and growth occur?
- Disciplined communication: always full disclosure (as much as possible, good faith effort)

FRAME THE ISSUE

- Identify the adaptive challenge to be discussed
- Avoid making it personal
- Stay on topic

ASSIGN ROLES

- Bible Study Facilitator
- Learning Module Facilitator
- Timekeeper

¹³ Peter Senge asserts, "In dialogue people become observers of their own thinking."¹³ Bohm says that "Most thought is collective in origin. Each individual does something with it," but it originates collectively by and large. "Language, for example, is entirely collective," says Bohm. "Bohm identifies three basic conditions that are necessary for dialogue:

1. All participants must 'suspend' their assumptions, literally to hold them 'as if suspended before us'.
2. All participants must regard one another as colleagues.
3. There must be a 'facilitator' who 'holds the context' of dialogue."

- Process Observer

APPENDIX 15 – COTTAGE MEETINGS



After one month of training, the TTF will host three months of cottage meeting series on three different topics, one topic per month. The TTF will consist of 12 members, divided into three teams of four. Each team will take a topic to study for a month. Then, after all teams have conducted their study, the *TTF Final Report with Recommendations* will be published to the members of the congregation. Then a townhall meeting will be held to discuss the implications of accepting the TTF’s recommendations. Following the townhall meeting, there will be a voter’s assembly to vote on which of the TTF recommendations will be approved. (See **Figure 28**, IIM Process Map, page 64.) The *TTF Final Report with Recommendations* will provide guidance and recommendations to the congregation on how to heal and move forward in truth and Christian love. Remember, Psalm 37:5 says, “Commit your way to the Lord; trust in him and he will do this: He will make your righteousness shine like the dawn, the justice of your cause like the noonday sun.”

APPENDIX 16 – SAMPLE COTTAGE MEETING SERIES

“REMEMBERING AND CELEBRATING PLC HISTORY”

“If you can’t describe what you are doing as a process you don’t know what you’re doing?” (W. Edwards Deming)

“All organizations are perfectly designed to get the results they are now getting. If we want different results, we must change the way we do things.” (Tom Northrup)

FRAMING THE LEARNING CONCEPT (10 minutes)

What is a learning CHURCH?

Chris Argyris and Donald A. Schon (1996) *Organizations as Collectives* Argyris and Schon tackle the basic question: “What is an organization that it may be able to learn?” They answer this question by treating an organization as a personal, rather than impersonal, entity.

But the personal organization, the CHURCH, is made up of individuals. Just because individuals might learn something does not mean the organization, the CHURCH, has learned something: “In many cases when knowledge held by individuals fails to enter into the stream of distinctively organizational thought and action, organizations know less than their members do.” In contrast, as in the case of the military and the phone company, “there are situations in which an organization seems to know far more than its individual members” due to “structures, procedures, and memories built into the fabric of organizations...”. Argyris and Schon assert that “when something that looks like organizational learning occurs, it seems, not infrequently, to have little to do with the person at the top.” Instead, “we might think of clusters of individual members as the agents who learn ‘for’ the larger organization to which they belong.” Cottage meetings would constitute such “clusters of individual members...who learn ‘for’ the larger organization [CHURCH] to which they belong.”

What happens when a CHURCH fails to learn?

Failure of an organization to learn is related to the degree views differ among individual members of the organization, or CHURCH. Argyris and Schon warn that as long as “stories remained scattered and uninterpreted, the map of the development process remained vague, and the diagnoses of the development problem remained ambiguous.” Argyris and Schon describe that, in organizational learning, “There is a continual, more or less concerted meshing of individuals’ images of their activity in the context of their collective interaction.” Bringing individual members together for today’s cottage meeting is meant to promote congregational learning and the timeline activity is meant to mesh individual experiences into the “context of their [PLC’s] collective interaction.”

Prepared by: Martin Lee, IIP

Prepared for: Palisades Lutheran Church, Pacific Palisades, CA

Two Types of Learning: Adaptive and Generative.

One of the important principles of Peter Senge's (American systems scientist, senior lecturer at MIT Sloan School of Management) work is the differentiation between adaptive and generative learning.

Adaptive Learning

He characterizes adaptive learning as focusing on the foundation of existing knowledge, and amending that with new thinking, to accomplish an objective. This kind of learning is particularly salient to organizations seeking continuous improvement. For example, understanding the gaps in existing ministry teams communicating or focusing on common goals. Senge's adaptive learning "enables the generation of additional ideas by which to close those gaps."

Generative Learning

By contrast, when new congregational vision, ministries, or ministry teams are urgently needed Senge approach recommends "a different kind of learning is required to produce radical new ideas and discontinuous change – which is the nature of generative learning (Harrison, 2000). This was validated soon afterward by scholar James March (1991), who expanded on this theory to identify two modes of organizational learning: 1) exploitation, or the use of existing knowledge and resources to gain value from what is already known; and 2) exploration or thinking in previously unused or unforeseen ways (i.e., seeking new options, experimenting, and conducting research) (p. 72)." However, too much exploration of new knowledge (generative learning) leaves the organization wishing for returns on its investments, while too much exploitation of existing knowledge (incremental learning) may result in it becoming outdated and useless.

The challenge with the TIMELINE ACTIVITY will be to create the appropriate balance – even though it may be a moving target – between the need to develop new knowledge versus leverage existing knowledge!

In a Peanuts cartoon Lucy demanded that Linus change TV channels, threatening him with her fist if he didn't. "What makes you think you can walk right in here and take over?" asks Linus.



What a sight to behold when the Church is a faithful partner in God’s Mission to seek and save the lost!

“REMEMBERING AND CELEBRATING PLC HISTORY”

TTF Team #1 – Maria Dwyer, Julie Hendricks, and Donna Shoupe

Palisades Lutheran Church, Pacific Palisades, CA

INTRODUCTION (3 minutes)

History is important. The life of PLC is influenced daily by our history. Our church history is part of “His-story”. The timeline activity is a living document. More will be added. It gives a snapshot. It reveals patterns. The sticker circles literally put you the participants on the timeline – which makes it a living document. This timeline can be equated to a family genogram. You may be able to get a sense for when the family was cutoff, distanced, enmeshed, or a bit rebellious. On the hand, you may observe when the family was passionate about a ministry or major event, joyful times, or real time of growth. The timeline is divided by 10 year markers from the birth to members being called into Glory. Above the “Gold Circle” section write the words: “Mission Accomplished – We done good and faithful servant!”

We will leave this timeline up. At least until the new settled pastor and family arrive. They will have a chance to see it and learn about their new church family. It will also be a scrap book for us and any new members who join us.

GOALS (1 minutes)

Group participation

Collaboration

Collegiality

Inspire new visions

Affirm values

See God’s providential hand at work

OBJECTIVES (2 minutes)

Identify those stories and values of the past to CELEBRATE and carry forward.

Remember those stories and grievances of the past to forgive, learn from, and LEAVE BEHIND at the CROSS.

GROUND RULES (2 minutes)

Disagree yes, disrespect no!

Speak the TRUTH in LOVE.

Come up with a few of your own...

STICKERS (10 minutes)

GREEN Circle – Place ONE green circle for when you joined PLC. Write your name on your circle.

RED Circle – Remember the color RED symbolizes the very precious blood of Christ that covers over a multitude of sin. Please place TWO red circles on the timeline, one for the most impactful event in the life of PLC that you wish to leave behind and one for the most Seminal moment in the life of PLC you wish to celebrate and carry forward. How are those moments still have an impact on the church? Write the event on the circle.

GOLD Circle – Revelations 2:10 says, “Be faithful unto death and I will give you a crown of life.” May we never forget that the church on earth is meant to save souls. Gold represents the crown of life. Place ONE gold circle for when you are projected to receive your victory crown. Place another “gold crown” on the timeline when you lost a significant other. Write the name on the circle.

TABLE TALKS (15 minutes) (Select two “RED” sticker EVENTS. One to take forward the other to leave behind. Then answer the following for each.)

Who was on staff at the time?

What was going on in America?

What was going on in the world?

What was going on in your life?

When did you have your largest growth?

When did you have your largest exodus?

GROUP DISCUSSION (15 minutes)

What was PLC's vision at the time of the merger in 1970?

What was the Vision of each of the 10-year segments since 1970?

Who were the first leaders and why did they decide there was a need to merge the two churches?

What were the specific needs the congregations were trying to meet at that time?

What were the major statements of belief?

What was the progression over the years and the factors that influenced them?

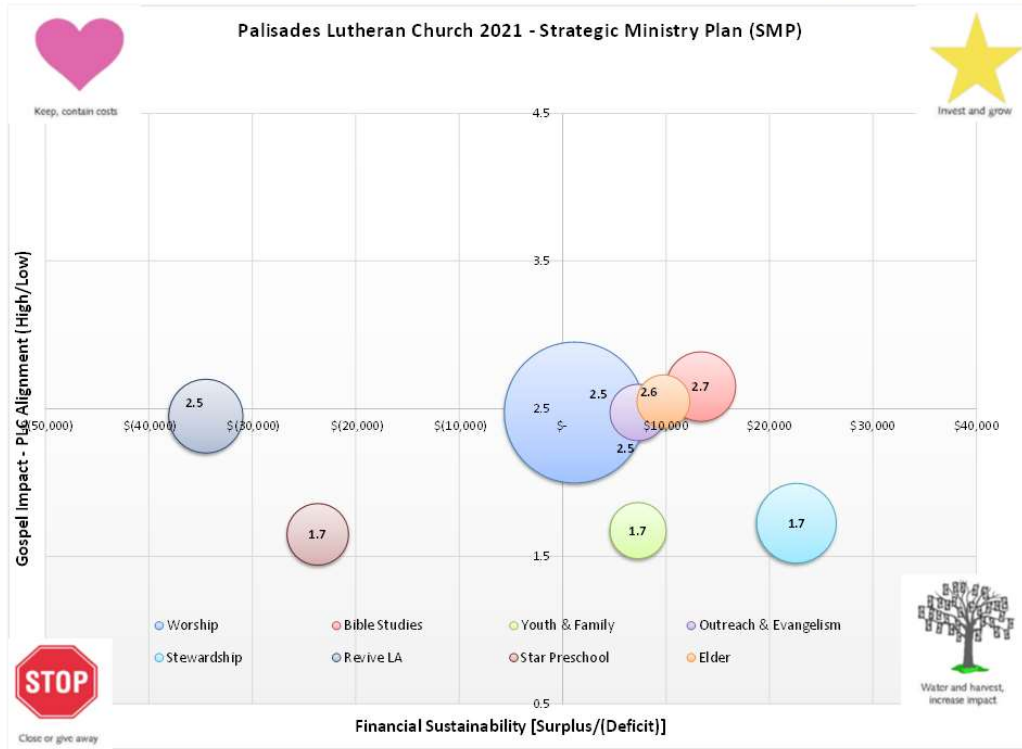
Where does PLC stand now compared to its history?

APPENDIX 17 – PLC’S “GIST” MINISTRY MAP

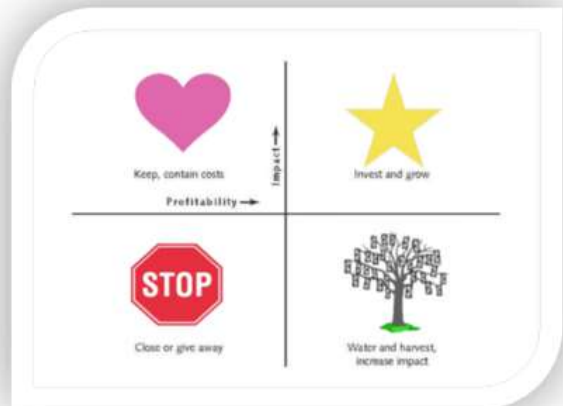
Gospel Impact and Stewardship Tool (GIST)

August 9, 2021

by Rev. Martin Lee, IIP
for Palisades Lutheran Church



Benefits of Visual Ministry Mapping: Promotes intelligent and honest dialogue about congregational stewardship challenges; and, motivates ministry leaders to collaborate and discover effective solutions in a comprehensive and integrated manner.



APPENDIX 18 – GOSPEL IMPACT SURVEY CRITERIA

1. Alignment with Core Mission

Over time, ministries may drift in core mission alignment. Hence, at any given time, some ministries are more aligned than others in Gospel impact. Most (or probably all) current ministries have some level of impact on individual participants, but there is room for discussion about whether these ministries are ever increasing (Eph 4:12-13) in alignment with the congregation's core mission to promote the Gospel of Jesus Christ.

2. Excellence in Execution

Often ministry programs will spend more explicit attention to planning than to execution. The criterion of excellence is a way of getting at execution. Is this ministry program something that the church-school offers in an outstanding, superior way? Do we execute this ministry program competently, or do we execute it amazingly well? The following are sources of information related to the criterion of excellence: Program evaluation data; Feedback from customers, patrons, and clients; and Direct observation; Staff performance evaluations; and Staff turnover and exit interviews.












3. Community Building

One measure of impact may be related to building the capacity and strength of the community – care ministries, spiritual growth, and mission field – rather than to building the organization itself. Does the ministry program help build the community around the church? The following sources may provide information related to the criterion of community building: Interviews with community and ministry leaders; Reviews of member support; and recent surveys.

4. Leverage

Ministry programs, of course, do not exist in isolation. One element of impact is leverage, the degree to which a ministry program increases the impact of other ministry programs. A ministry may score high on the criterion of leverage because it creates opportunity for evangelism, member and visitor assimilation, youth engagement, volunteer participation, worship attendance or increased offerings.

APPENDIX 19 – GOSPEL IMPERATIVE DECISION TABLE

| PLC CORE MINISTRIES | QUADRANT | GOSPEL IMPERATIVE ("Relative") | ACTION |
|-------------------------|---|--|--------|
| Worship |   | Keep. Contain costs. Invest grow, increase Gospel impact. | TBD |
| Bible Study |  | Keep. Contain costs. Invest and grow. | TBD |
| Youth and Family |  | Water harvest and increase Gospel impact. | TBD |
| Outreach and Evangelism |   | Keep. Contain costs. Invest and grow, increase Gospel impact. | TBD |
| Stewardship |  | Water harvest and increase Gospel impact. | TBD |
| Revive LA |   | Close or give away. Keep. Contain costs. | TBD |
| STAR PreSchool |  | Close or give away. | TBD |
| Elders |  | Keep. Contain costs. Invest and grow. | TBD |