



2. Beside each item above, list to whom that responsibility would be most likely fall to should you no longer be able to do so.

3. For each major duty, consider the impact it would have on others if you suddenly could not fulfill that responsibility.

*Ex: If I were not present to prepare the weekly meetings, they would likely have other staff fill in adding to their already heavy schedules.*

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

4. How long do you plan to stay in your current role? Circle one:

Less Than a Year    1-2 years    3-5 years    5 + years

5. What factors might cause you to leave this role in the immediate future and in the next five years?

Immediate future: \_\_\_\_\_

Next five years: \_\_\_\_\_

6. Based on your responses above, what would you conclude the importance level of developing an understudy to be? Put an "x" where you think the importance level is:

Low -----Medium-----High

7. What is your conclusion? Do you need to begin developing someone who can replace you? Why or why not? If not, is your reasoning sound or a need to hold onto power or position?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## PART II: THE OBSTACLES

***Most leaders never get around to making and implementing a transition plan. Some common reasons are as follows:***

- ***Life for the leader is already busy. Where does one find time for the thought and effort a transition plan requires?***
- ***The power of the urgent often crowds out the important. Furthermore, the reward for a transition plan comes down the road. It is a crop that takes months or even years to grow. And even as the fruit appears, the leader is not the one***

**who primarily enjoys it. Rather it is the congregation and the next generation who benefits.**

- **If a leader has personal insecurities, he/she can end up subconsciously procrastinating and avoiding what he/she fears will be a loss of power and identity.**
- **If finances are involved, such as hiring a staff person, he/she may get push back from financial officers who don't understand this need.**
- **The lack of suitable or interested candidates for succession may discourage the leader from even trying.**

1. What will be the biggest obstacles for you in developing and implementing a transition plan? Circle those that apply and add your own obstacles in the blanks below.

- a. I am too busy.
- b. I don't want to face the fact that I will not be in this role forever.
- c. I am afraid of training someone who might become better than me and win over those I serve.
- d. I don't see any viable candidates.
- e. I don't believe our leadership would support the idea.
- f. \_\_\_\_\_
- g. \_\_\_\_\_
- h. \_\_\_\_\_
- i. \_\_\_\_\_

2. For each obstacle, brainstorm a solution. How could the obstacle be overcome, including who might help you overcome it?

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

3. Do you believe or have faith that these obstacles could be overcome? Why or why not?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### PART III: THE PLAN

1. Ask Christ to lead you in your planning. Pray for wisdom.
2. Make a list of those with whom you need to discuss the idea of a transition plan:

Organizational Leadership: \_\_\_\_\_

Mentors: \_\_\_\_\_

Peers: \_\_\_\_\_

Family: \_\_\_\_\_

Friends: \_\_\_\_\_

With whom from the above list would it be best to discuss any fears or insecurities you may have?

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3. When will you discuss your ideas with each person above? What would prevent you from putting those dates on your calendar now?

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4. Consider forming a transition team: a group that would help you think through and implement your transition plan. Who would be wise and interested advisors?

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5. Draw up the qualities and skills you would look for in an understudy on a separate sheet. Prioritize the items in order of importance.

6. Consider your expectations in such an arrangement. Before involving someone in an understudy or successor position, it is best to be clear about what you will expect, what may or may not happen as time goes by, what you will do if the arrangement does not work as expected.

7. Make a list of possible understudies. Beside each name list positives and negatives.

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

8. Discuss the individual names with trusted advisors or your transition team.

9. Approach possible successors, again being very clear about expectations, possibilities and hopes. Be patient. Better a delayed choice than a bad choice.

10. After choosing a possible successor, consider ways this individual in particular can best be groomed. How will you transfer some of your skills, experience and insights to him/her? Jot down a flexible, tentative plan. Do you need continued training in order to better train your successor?

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11. As the transition is in process, regularly ask yourself:
  - a. Are we moving too fast, too slow or just about right?
  - b. Am I resisting giving away responsibility or holding too tightly to my position or status? Do I want him/her to succeed?
  - c. Am I proactively training or just leaving him/her to develop on his/her own?
  - d. What areas am I neglecting to transfer?
  - e. Is he developing as I had hoped? If not, do I feel the freedom to adjust the process or even stop and start over if his/her development is not going as hoped?
  - f. How is the understudy feeling about the progress?
  
12. As your transition nears, consider who else will have to go through their own transition as you do yours. This might include your spouse, children, friends, administrative assistant, etc.

## PART IV: THE TRANSITION

***This section is for those who are near an actual transition, not just planning it but entering the final months.***

1. Make a list to those to whom you need to communicate your final plan and transition dates.
  - a. Family: \_\_\_\_\_
  - b. Staff: \_\_\_\_\_
  - c. Leadership: \_\_\_\_\_
  - d. Organization: \_\_\_\_\_
  - e. Others: \_\_\_\_\_

Decide when and how you will communicate your plan to each group.

2. What needs to be done for the new leader? How can you launch him/her with in the most helpful manner?  
\_\_\_\_\_  
\_\_\_\_\_
  
3. Bob Russell suggested several things that helped in the transition at Southeast Christian: a church-wide reenlistment, release of the reins earlier than planned, and his personal decision not to return to the church for one year. How might you enhance your transition?  
\_\_\_\_\_  
\_\_\_\_\_
  
4. What is your dream for the next phase of life? You might sit down and imagine it and begin living in that new phase mentally.
  - a. Is this future vision exciting and personally inspiring?
  - b. How does the power of this vision compared to what you are doing now?
  - c. With whom do you need to fill out this vision?

5. Saying goodbye is important. People need to grieve. While you have been considering a transition for months or even years, others will not have thought much about it and can feel the change has suddenly come upon them. On the back of this sheet, list the various constituencies with which you are associated and consider how you might best say goodbye to each. The church or organization as a whole may need one kind of good-bye while an intimate group of associates may call for something totally different. It is natural to be self-conscious about allowing for or even planning your good-byes, but remember Jesus very proactively planned how he would say good-bye to his followers, thinking of their good. What would it be like for you to do the same?
  
6. As you approach the transition, here is a checklist for the actual passing of the baton:
  - a. Are you running out of steam or sprinting to the finish line?
  - b. Is your successor running strongly, focused, ready?
  - c. Are you both in the same lane, heading the same direction?
  - d. Is the passing progressing at a good pace?
  - e. Is the organization gaining a step forward in the transition?
  - f. After passing, are you ready to move off the track in another direction?
  
7. In the actual transition ceremony:
  - a. What symbols might be involved that would fit the tenor of your culture?
  - b. Who should be key participants in the ceremony?
  - c. What part, if any, should your family play?
  - d. How can you best encourage and empower the new leader during the formal transition?
  - e. What plans do you have for the hours and days immediately following the transition service?
  
8. Finally, determine ways you will support and encourage the new leader, and graciously go from being “the man” to his/her “biggest fan.”