

Report for the Council of
Trinity Lutheran Church
Waupaca, Wisconsin
May 2019

Following the annual meeting of Trinity on February 3, which was dominated by the discussion of the budget deficit, concerns about the sustainability of a three-pastor model, and Pastor Bryan Robertson's announcement that he was open to another call, Bishop Jerry Mansholt suggested to Council that they work with a ministry consultant to help explore issues of leadership and governance, role clarification, sustainability, and visioning. Agreeing to work with me, the first phase was to gather data through listening sessions and documents in order for me to gain a more thorough understanding of the congregation and its leadership and assess how best to shape the work.

In gathering information, I met individually with all members of staff, including Pastor Bryan before he left; with all members of Council either individually or in small groups; the former President of the congregation; and (with the assistance of my colleague Henry Peters) 88 members of the congregation who self-selected to participate in small groups, for a total of 114 persons. While there were diverse views shared, there was less diversity demographically: most of the members who participated were over the age of 50 (if not 60) and have been at Trinity for 15 or more years. I greatly appreciate both the time and thoughts that everyone shared with me in this listening process; it has been invaluable in helping me better understand Trinity.

Included in the documents I read were several years' worth of annual reports, the previous year's Council minutes, Trinity's constitution and by-laws, continuing resolutions, the Vision 2010 and Vision 2015 documents, the report from the 2014 town hall meetings, and the 2015 Ministry Site Profile.

Observations and Process Recommendations

It is clear that Trinity has much to celebrate and be grateful for: people spoke warmly of the way this community has nurtured and helped shape their faith journey, of the ministries in which they participate, and of the crisis and mission outreach to communities both near and far. People have deep friendships within the congregation; and many mentioned a feeling of family within the congregation, despite its large size. An overwhelming majority of participants spoke highly of the current two pastors, and many gave high praise both to the youth and music ministries of Trinity. While approximately a fifth of participants voiced concern over the building debt or finances, many also acknowledged that the facility is an asset not only to the congregation but to the wider Waupaca community and proudly spoke of the welcome of outside groups to meet at Trinity.

Like all congregations, though, Trinity has had its share of ups and downs; and many expressed concern, if not anxiety, about the present. Shortly after its inception in 1943, Trinity has had significant stability in three long pastorates, from 1949 to 2014. Since the retirement of Pastor Chuck Tews, coming only two years after the building of the new sanctuary, the congregation has been in a state of continual transition with clergy and staff. After several decades with weekly worship attendance fluctuating between the low 500s to at least mid-600s, the last four years have seen a steady decline through the 400s, reaching a low of 391 in 2018 (the first third of 2019 has seen a reverse in that trend with a rise back to the mid-400s). A decline in giving has led to a budget deficit, precipitating the shift to a two-pastor model. The perception was universal that levels of participation, volunteerism, and energy were all low.

Not surprisingly, there were a variety of theories offered. For those who thought Pastor Bryan was not a good fit for the congregation, they tended to ascribe the decline to his leadership and preaching. For those who supported Pastor Bryan, staff conflicts and turnover and a perceived lack of support and unclear organizational structures were contributing factors. There is most likely an element of truth to both perspectives, combined with at least three additional factors: the success rate of new calls following long pastorates, the fact that the third year is often a difficult transition in any pastor/congregation relationship, and the larger societal trends affecting mainline churches. All of these combined exert a tremendous amount of stress on a congregation.

First, the reality is that despite thoughtful and careful interims and call processes, new pastors often become the unintentional interim following a long pastorate: congregations often need a longer transition time than they expect. Second, the 'honeymoon' period for pastor and congregation typically lasts for a few months to the first two years. By year two or three, disappointment settles in, and it can be a difficult hurdle for all. Third, Trinity is bumping up against the larger trends that are affecting many churches, including most mainline ones. The percentage of 'nones' and 'dones' in terms of religious affiliation and church membership has steadily increased. People in general are less prone to join organizations. Retired church members travel more, and younger families contend with competing interests of school and sports. What once would have been considered sporadic attendance of coming to church only once or twice a month is now considered regular. All these factors present challenges and none has a quick or easy fix.

Human organizations, including congregations, can be complex; and large congregations are certainly complex. Increased growth makes coordinating and managing ministries and structures more challenging. There is greater diversity in needs, interests, perceptions, preferences, and expectations. Back in 2014 Trinity's interim pastor, the Rev. Beth Macha, reflected on the differing expectations within Trinity regarding how a congregation and pastor should function, contributing this to a lack of understanding how a congregation's size affects its function. I concur with her. There has been a large body of research developed over decades regarding the size and function of congregations; and in a number of ways, Trinity functions as if it were a smaller congregation.

There are five basic leadership systems in congregations that collectively manage the complexity of the organization. These five systems are highly interdependent: change in any one of these tends to produce change in the others. These leadership systems are:

- Clergy leadership roles
- Staff design and function
- Governance and Council function
- Involvement and leadership of laity
- Forming and executing strategy

How these systems relate to one another and function effectively shifts depending on the size of the congregation. Much of the work I suggest focuses on attending to these systems in ways that will be more effective for Trinity.

Clergy Leadership Roles

The overwhelming majority of people who participated in the listening sessions have high regard for and trust in the current two pastors: they are perceived to be very capable and work as a good, collaborative team. Many spoke appreciatively of their preaching, pastoral care, and interactions with members, especially younger ones. The desire or need to keep both Pastor Andy and Pastor Dione was repeatedly expressed. Several spoke of the desire that Pastor Andy be called as the Lead Pastor, with one person stating, 'We needed three years of Bryan for Andy to be ready to lead'. The question of whether Trinity could call its two current pastors as co-pastors was raised repeatedly. Only five individuals articulated that there ought to be further changes in clergy staffing.

The most often repeated concern was the fear that the pastors would experience burn-out with the additional workload in shifting from three to two pastors. A number of individuals shared the perspective that things didn't get done if the pastors did not initiate and take the lead. Trinity is very pastor dependent, which is not surprising given its history of long pastorates. There are considerable competing expectations that the clergy will be present at most events and committee meetings as well as be available for pastoral care. The perception in the 2014 town hall meetings of the need for three pastors meant that the congregation could continue to have such expectations of the clergy.

The good news is that Trinity has been able to adapt to changes in the past, including times in its history of having only two pastors. The challenge will be for the congregation to adjust and manage its demands on clergy time and performance. Members in the listening sessions suggested reducing the number of services from four to three, utilizing lay preachers and pastoral care givers, and involving more laity in confirmation as possible means to help make the workload more manageable. Many heartily approve of the need for an administrator in order to free up clergy to focus on pastoral responsibilities. The need for members, especially younger ones, to step up and be more involved was repeatedly stated. Yet people also voiced concerns that ministries and programs such as confirmation might be diluted, tacitly implying that lay-led programs were of lesser quality or that clergy would not be able to give sufficient time and attention to these areas or both.

In the short term, we have begun to look at the division of responsibilities for the interim between Pastor Andy and Pastor Dione, including shifting the youth and family ministries over to Kim Miller to allow Pastor Andy to move into a more generalist role as the Interim Lead Pastor. As Council and congregation work towards the call of a new Lead Pastor or possibly co-pastors, the division and expectations of clergy roles will be a frequent topic. In the meantime, though, as one person said, 'People need to step back and give the pastors time to create the new normal'. It is imperative that Council and other lay leaders not only support the clergy during this time by helping to maintain new boundaries but also help the congregation in this transition by listening to fears and concerns as well as hopes, helping members to let go of unrealistic expectations, and reminding the congregation that Trinity is solidly grounded in the gospel of Jesus Christ which brings new life.

In large congregations, the senior or lead pastor must not only offer leadership in terms of vision but must also function in a more managerial style in facilitating the staff and board work and developing strong lay leaders. This is a major shift from small to mid-size congregations where the pastor manages the life of the congregation by managing relationships. The senior pastor of a large congregation also has a more public role in the wider community, a function that a number of members noted has been missing or weakened since the retirement of Pastor Chuck. These roles also mean there is always a struggle for a senior pastor in

how to appropriately engage in pastoral care. The call committee in 2015 understood this, with listing administration and equipping lay leaders amongst the top priorities of the Lead Pastor. The difficulty has been, though, that there has not been clarity around roles and function to enable effective management.

During this interim, I propose working with the clergy, Council, and Personnel Committee to explore and clarify expectations for the Lead Pastor (or the possibility of a co-pastor leadership model), particularly as it relates to administration, staff supervision, oversight, vision, and leadership development. This necessitates also exploring the role of the Associate Pastor and whether that role, going forward, should be as a generalist or specialized in a particular ministry.

I also suggest that I work with Council and the Personnel Committee to design and implement a process for regular mutual ministry review as a means of tending to the critical relationship of clergy and congregation, strengthening the work of each, and offering a means to collaboratively identify and address concerns early on.

While there were mixed reviews on the effectiveness of Pastor Bryan's ministry at Trinity, there was a consistent message from members that they felt they did not have ample forewarning of the change that was to happen. As we work through this process and as Council and Synod work on the timing of calling a Lead Pastor, it is imperative that there be frequent and transparent communication and engagement with the congregation.

Staff Design and Function

Trinity has experienced considerable staff overturn in the past several years, with members of the congregation at times either experiencing or sensing friction between staff members. While that has not entirely dissipated, the current staff believes that there has been improvement as they begin to gel more as a team. Almost all of the staff as well as members of Council acknowledge that there is a lack of clarity regarding job responsibilities and reporting and supervision structures. There has also been minimum in terms of orientation and training. The staff has struggled as well with communication, both interpersonally within the team and in how communication is handled throughout the congregation.

Members of the congregation stated, not always with approval, that lots of ministry in Trinity is staff driven. (There were also several who thought that individual staff salaries ought to be known by the congregation.) The reality of large congregations, though, is that continued growth requires a continued expansion of programming that cannot be maintained by volunteers alone. As congregations grow, program staff positions tend to increase and become more specialized. Staff exists to help equip and support the laity in carrying out the mission of the congregation. Together with both elected and appointed lay leadership, they share responsibility for the mission, vision, and strategy of the congregation: Council is responsible for governance and the staff team is responsible for management. This division of labor requires clarity regarding roles and tasks and clearly defined boundaries and lines of supervision.

On the whole, there was approval and gratitude expressed for Kerry Lee Blanke's willingness to step in as a voluntary administrator, allowing the staff and congregation to experiment with how the addition of this role will both free up clergy for other responsibilities and facilitate the smoother daily management of office and facility. Given the current budgetary concerns, members have questions if such a position can be funded when the congregation is not able to sustain a third pastor. If it is deemed that this position is a crucial improvement, then Council will need to determine the best staffing configuration to meet the current needs of the congregation within its available resources.

I suggest that work with staff cover four areas: continued team building within the staff to develop measurable norms for how they work together and ways to improve their communication and coordination; work with staff and the Personnel Committee to update job descriptions and establish a process for regular and ongoing supervision that empowers those directly overseeing the work of various staff; better align the relationship and functions of the Lead Pastor, the Personnel Committee, and the Council; and assist Council in decisions regarding staff configuration.

Governance and Council Function

In many ways, issues around governance and Council function manifest ways in which Trinity is not functioning most effectively for a congregation its size. Members, including those currently on Council, discussed the efforts at times to find people willing to serve while others shared the perception that the same relatively small group cycles through leadership positions. Questions have arisen over the roles, functions, and decision-making authority of the Executive Committee in relationship to the Council. Council members themselves described the Council as feeling like a silent partner in relation to the Executive Committee and the Personnel Committee.

Both governing boards and staff have leadership roles in congregations and must jointly negotiate who is responsible for what. In large congregations, as staff becomes more specialized and increasingly responsible for the management of programs and ministry, the governing body often flounders. It ends up misunderstanding its charge for oversight, resulting in micro-management of clergy and staff and feeling like it moves from crisis to crisis.

In best practices, the governing board is responsible for strategic leadership: discerning and articulating mission and goals, naming priorities, and establishing accountability systems. This work contains a fiduciary component as well as strategic and generative components. In turn, the staff is primarily responsible for strategic management: the design, execution, and evaluation of processes and programs that incarnate the goals and direction set by the board. The senior or lead pastor is the linchpin. Trinity is currently struggling to find its footing in these areas.

More than one Council member described the Council as being in ‘reactive mode’, lacking clear plans, goals, and shared agreement on roles and responsibilities. And, as one Council member observed, this then trickles down to the various committees and ministries of the congregation as well as staff. In its recent history, orientation, training, and leadership development have either been severely curtailed or are non-existent, further adding to feelings of being ill equipped.

As with the staff, the Council has struggled with communication and transparency; and this frustration is felt by both Council members and the congregation. There is also a pattern in the congregation of making decisions and then not following through on their implementation. There have been numerous studies and plans around structure and committee plans, and yet little has changed.

Work in this area is likely to present the greatest challenge to the congregation and certainly to Council and is best done, or at least begun, prior to decisions around the call of the Lead Pastor. This work not only would represent the bulk of my time but will require a firm commitment on the part of Trinity’s leadership, including additional time beyond the monthly Council meetings. My goal is to partner with the leadership in the establishment and practice of new understanding in the Council’s role of governance and in the formation of supporting structures and processes in the hope of breaking the cycle of plans not resulting in the desired change.

Engagement of Laity/Ministry of the Laity

People clearly love Trinity and desire it to thrive for generations to come. Members spoke of their experiences of being warmly welcomed into the congregation and of their joy in serving in a variety of ministries including choirs, church school, elders, youth ministry, adult formation and bible studies, women's circles, men's ministry, and mission trips. Trinity is blessed to have a number of members who have attended and graduated from lay school as well as others who serve faithfully on committees of the congregation.

There were recurring themes, though, as people identified and reflected on some of the challenges. While some spoke of a warm welcome, others shared from their experiences that it is not easy to enter as a newcomer. As with large congregations in general, new people are able to remain relatively anonymous, sometimes for years. Several acknowledged that there is a lack of follow-thru with people who drift away. At times Trinity has struggled to maintain a small group ministry and currently does not have one. There is the perception and at times judgment that younger or newer members are not volunteering in ways many older members would hope, while some younger or newer members have felt that the torch as not always been graciously passed – if passed at all.

A sampling of quotations from some who participated in the listening sessions highlight the range of complexity and challenges in addressing this area. 'We're good at equipping, but I'm not feeling like I'm being sent out.' 'We have no expectations for being members.' 'We've gotten passive about recruiting.' 'People want to help, but they want to be asked.' 'I've volunteered but have never been called.' 'We have gotten used to the clergy being involved in everything.' 'We don't equip lay leaders well.' 'No one wants to step into leadership; lots of things have fallen by the wayside.' 'It's hard to know who to go to if you want to be involved.' 'We need three pastors, otherwise they might ask us to do something.' 'We haven't empowered people for discipleship.'

The Vision 2015 document contained the recommendation to create a volunteer coordinator position, and I concur with that recommendation. Currently this work is being done within the office staff, who have other responsibilities that compete for time and attention. While often viewed as an administrative function, this role is actually more programmatic. At this point, I suggest that I work with a small team to analyze the current volunteer management process and help connect them and the membership committee to resources and best practices in other large congregations to help improve efficiency and begin to enhance the programmatic aspect of this role. I also suggest that we build on the work of leadership development with Council to include leadership development at the committee level.

Forming and Executing Strategy/Vision, Planning, and Strategy

Members, including current and former Council members, and staff all acknowledge that Trinity is in a vision vacuum. As one person noted, 'We don't have a vision. If we did, Trinity could be a powerhouse in the community.' Another said, 'We're coasting.' Numerous people noted that while Trinity has a great variety of ministries within the congregation, there is less engagement with the wider community on an ongoing basis. This is borne out in the organizational structure, as there is no outreach/social committee. Even large, active congregations begin to stagnate if they don't have a sense of purpose beyond ministering within their own membership.

Large congregations have particular challenges when it comes to forming and implementing a vision. One of the things people often appreciate about large churches is the diversity of programming: there is something

for everyone. The difficulty is that the pursuit of every good idea is a death knell for working toward a vision. In addition to discerning what should be the ministries within the congregation is the question of how the congregation decides to whom it will be neighbor: what is the outward focus of the mission and ministry of the congregation? How is a vision discerned? How best to balance and connect the vision of the Lead Pastor with the vision held by members of the congregation? What to do about the often unexpressed expectations of the more anonymous, disengaged members?

It is clear Trinity needs a vision. In the past it had relied on the Lead Pastor to help discern and articulate that on their behalf. There are at least two choices before the congregation: call a Lead Pastor who will then have a central role in the visioning and strategic process or first discern a vision and then call a pastor who can help you live into it. Each approach carries benefits and risks. The approach and timing of your call process will need to be coordinated between Council and the Synod. The work around the structure and function of Council will aid in the work of forming and executing a vision, but it is not the work itself. Once the timing and approach on the call process has been determined, we can look at when and how best to discern a vision.

There was an array of concerns, issues, and ideas shared during the listening sessions that are beyond the purview of this work. However, I wanted to name them both to acknowledge that they exist and so that they may be addressed with the appropriate groups. These all represent adaptive challenges, meaning they have no clear solution and will require ongoing attention and experimentation.

- ***Style and number of worship services:*** not surprisingly, with such a large congregation there are diverse preferences regarding worship. While people did raise questions regarding what number of services were now needed, most of the comments reflected differing tastes of traditional vs contemporary styles of worship, including music.
- ***How to get younger families more involved and committed:*** this concern gets voiced every time there is input sought on the congregation, going back at least to 2005 and most likely earlier than that. Unfortunately, there is no silver bullet here; and simply expecting families to function in church as they did a generation ago will not bring about the desired results.
- ***The design and content of the Confirmation program:*** connected to the above concern, this is one programmatic area directly impacted with the shift from three to two pastors. It raises larger questions about the structure of Wednesday evenings at Trinity, the role of clergy and lay leaders in confirmation, and expectations and engagement of both youth and their parents.
- ***Stewardship and a strategy for future funding:*** numerous people expressed concern over the long-term financial viability of Trinity, especially as more generous donors are frequently older. There has been less of a programmatic emphasis on stewardship in recent years. The fact that Trinity will be taking part in the Stewardship for All Seasons training is an encouraging step.
- ***Strong youth ministry is leaving some older members feeling ignored:*** again, how best to minister to diverse segments within the congregation.
- ***The office being closed on Fridays:*** this was raised repeatedly and is clearly an unpopular decision with a number of members. It may well be worth revisiting this to explore other options to meet competing needs.