

INFORMAL AND INCIDENTAL LEARNING DURING CONGREGATIONAL
LEADERSHIP TRANSITIONS

by

ANNA MITCHELL HALL

(Under the Direction of Karen E. Watkins)

ABSTRACT

Adults learn constantly through their experiences in communities and organizations. Adult learning is heightened by organizational change, and congregations are frequently sites of such learning for members. The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations as the congregations experience a pastoral transition, during the period between the exit of a lead pastor and the arrival of a successor. The questions that guided this study were: what informal learning occurs in congregants and congregations as they experience leadership transition?, what incidental learning occurs in congregants and congregations as they experience leadership transition?, and what roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition? This qualitative case study of three congregations experiencing pastoral transitions consisted of interviews, observations, and document analysis and focused on exploring the presence, content, and dimensions of learning in individual congregants and congregations as whole organizations. The study found that informal and incidental learning were present throughout the lives of church members during the time of

pastoral transition. All interviewees reported some informal and/or incidental learning during their experience of the transition. Religious life and practice, including presentations of information, interaction with others, self-directed knowledge seeking, and personal experiences in a congregation, were sources of informal and incidental learning about the congregation, denomination, and religion, about the pastoral search process, and the roles of pastors. Informal and incidental learning often added to or reinforced existing frames of reference but rarely changed those frames. The learning that occurred in the three congregations differed in ways that correlated with congregational characteristics such as structure, stated theology, size, denominational affiliation, and the processes and language used during the transition. Congregational learning could be increased and improved through organizational intentionality and structures designed to support this learning, including improving the learning climate in the congregation, using narrative work with members to aid their reflection on the experience, and convening small groups for critical reflection and dialogue throughout the process of pastoral transition.

INDEX WORDS: Congregation, Leadership transition, Pastoral transition, Succession, Informal learning, Incidental learning, Organizational learning, Congregational learning, Learning in community, Adult learning.

INFORMAL AND INCIDENTAL LEARNING DURING CONGREGATIONAL
LEADERSHIP TRANSITIONS

by

ANNA MITCHELL HALL

BA, Valdosta State University, 1996

MPA, Valdosta State University, 2002

A Dissertation Submitted to the Graduate Faculty of The University of Georgia in Partial
Fulfillment of the Requirements for the Degree

DOCTOR OF PHILOSOPHY

ATHENS, GEORGIA

2016

© 2016

ANNA MITCHELL HALL

All Rights Reserved

INFORMAL AND INCIDENTAL LEARNING DURING CONGREGATIONAL
LEADERSHIP TRANSITIONS

by

ANNA MITCHELL HALL

Major Professor: Karen E. Watkins

Committee: Kathleen P. deMarrais
Aliko Nicolaides

Electronic Version Approved:

Suzanne Barbour
Dean of the Graduate School
The University of Georgia
May 2016

DEDICATION

This dissertation is dedicated to Jim, and all of my family, for their inspiration and support throughout my academic career; to Virginia-Highland Church, for inspiring this study; and to the three churches I studied, for their welcome and willingness to share their experience with me. I also dedicate this work to all those churches, clergy, and laity who believe that following Jesus still holds great potential to change the world, and who have dedicated their life to this work.

ACKNOWLEDGEMENTS

My deepest and sincerest gratitude goes to my committee, especially my major professor, Karen Watkins, who along with Kathleen deMarrais and Aliko Nikolaides shaped and guided my research and writing in numerous ways. I also offer my gratitude to Bob Hill, my first major professor, for his inspiration and guidance. I couldn't have completed this work without my husband, Jim Hall, and his constant help that allowed me to focus on my studies, as well as his unwavering belief in my potential. I especially offer gratitude to all those who participated in my study, for without their openness and generous spirits my work would not have been possible. I lift up particular thanks to my mother, Patricia Tolar, for her editing help, and to my parents, Patricia and Paul Tolar, David and Eddie Mitchell, and my mother-in-law Marion Hall, for their constant support of my long academic journey. I am also thankful for those friends and colleagues who kept me going with their interest, conversation and companionship, especially Laura Rogers Reece, Hsiao-Hui Chen, Monica Arboleda, Rubina Malik, Cameron Trimble, Gregg Carlson, Chris Hamel and the whole Center for Progressive Renewal Team, and Michael Piazza, David Plunkett, Kathy Burton and all staff and members of Virginia-Highland Church. I am particularly thankful for my colleague and friend Jeff Ayers, for his persistence that I follow my call to ministry and to scholarship. I offer thanks to all of my faculty and colleagues in my Master of Divinity program at Candler School of Theology, who inspired and prepared me to study learning in churches. And finally, a special thanks to the ladies at the gym who never fail to ask about my progress, and the many servers who kept me supplied with beverages and treats during long writing and editing days at coffee and tea shops around Atlanta.

TABLE OF CONTENTS

	Page
ACKNOWLEDGEMENTS	v
LIST OF TABLES	ix
LIST OF FIGURES	x
PROLOGUE	1
CHAPTER	
1 INTRODUCTION TO THE STUDY	2
Background	2
Statement of the Problem	5
Purpose of the Study	6
Significance of the Study	7
Chapter Summary	8
Definitions	9
2 REVIEW OF THE LITERATURE	10
Introduction	10
Literature Search Methodology	12
Experiential Learning	12
Informal Learning	14
Incidental Learning	16
Marsick and Watkins' Model of Informal and Incidental Learning	17

Leadership Transitions.....	31
Gaps in the Literature.....	49
Implications and Significance.....	50
Chapter Summary	51
3 METHODOLOGY	52
Research Design.....	53
Conducting the Case Study.....	58
Analysis.....	79
Quality.....	84
Insider or Outsider?.....	87
Representation.....	89
Significance.....	89
Chapter Summary	90
4 THE CONGREGATIONS IN TRANSITION.....	92
The Purpose of the Study and Research Questions	92
The Three Churches and Their Members	93
Smalltown First Baptist Church: “Seeing God's will manifested”	94
Suburban Presbyterian Church: “Try to see God’s purpose for you and your congregation”	114
Urban Congregational Church: “People ...do what needs to be done to make it survive.”	136
Chapter Summary	158

5	FINDINGS	159
	Research Questions: What informal learning occurs in congregants and congregations as they experience leadership transition? What incidental learning occurs in congregants and congregations as they experience leadership transition?	160
	Research Question: What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?	167
	Chapter Summary	172
6	SUMMARY, CONCLUSIONS, AND IMPLICATIONS	174
	Summary of the Study	174
	Conclusions	177
	Implications for Practice	194
	Limitations of this Study	196
	Implications for Further Research	196
	Chapter Summary	198
	Closing Words	199
	REFERENCES	201

LIST OF TABLES

	Page
Table 1: Research on Informal and Incidental Learning in Congregations	31
Table 2: Research on Leadership Transitions	48
Table 3: Research participants	65
Table 4: Observations	73
Table 5: Documents	76
Table 6: Topics and Triggers of Informal Learning	161
Table 7: Topics and Triggers of Incidental Learning	161
Table 8: Research on Informal and Incidental Learning in Congregations, with Study Findings.....	186
Table 9: Research on Leadership Transitions, with Study Findings	189

LIST OF FIGURES

	Page
Figure 1: Marsick and Watkins' informal and incidental learning model.....	18
Figure 2: Interview Protocol	68
Figure 3: Excerpts from the research report to Urban Congregational.....	83

PROLOGUE

I grew up in a church that was experiencing ongoing conflict and a split over worship issues. All but one of the churches I have ever been a part of have experienced a conflict, split, or leadership transition during my time there. Sometimes several of those simultaneously. In my last church, I had just been hired on staff when the pastor announced his resignation. During our transition process, which stretched on for almost three years, I began to notice new things. People were talking differently, acting differently, working differently together. Coursework at the University of Georgia awakened me to the possibility that I was witnessing a kind of learning that occurred informally and incidentally, simply as a byproduct of the experiences and information-seeking of congregation members during this challenging time. From that experience and my curiosity to see if the same learning was present in other congregations experiencing transition, grew this study.

CHAPTER 1

INTRODUCTION TO THE STUDY

It is change, continuing change, inevitable change, that is the dominant factor in society today.
-Isaac Asimov, “My Own View” in *The Encyclopedia of Science Fiction*.

Everything gives way and nothing stands fast.
-Heraclitus, in Plato, *Cratylus*, 360 BC

Everything old has passed away; see, everything has become new.
-2 Corinthians 5:17-19, New Revised Standard Version

Background

Change is constant in society and its organizations. Religious organizations, like other types of organizations and communities, are subject to change. Highly publicized examples of congregational change make headlines, from pastors who find themselves in the midst of sexual scandals to congregations who must relinquish their shining cathedrals because of financial instability. These examples may seem particularly dramatic; yet any time a congregation encounters change in personnel, structure, or affiliation, this encounter can be a profound experience of learning and change for those deeply involved.

In congregations, as in all contexts, one of the primary ways adults learn is through experience (Dewey, 1938/1997; Vygotskiĭ, 1978). Although learning in community can and often does take place through intentional educational events, the majority of experiential learning occurs when something non-routine happens in the life of an individual or organization (Marsick & Watkins, 1990). Non-structured experiential learning falls under the categories of informal and incidental learning (Marsick & Watkins, 1990). *Informal learning* takes place outside of a dedicated learning environment and arises from the activities and interests of individuals and

groups (McGivney, 1999). *Incidental learning* is a subset of informal learning, “a byproduct of some other activity, such as task accomplishment, interpersonal interactions sensing the organizational culture, or trial-and-error experimentation” (Marsick & Watkins, 1990, p. 7). Certain types of community and organizational activities, such as engaging with other members of the community, taking action and reflecting on those actions, and participating in shared experience or practice are identified as environments for learning in community (Argyris & Schon, 1996; Easterby-Smith, Araujo & Burgoyne, 1999; Findsen, 2006; Foley, 1993; Kilpatrick, 2002; Lange, 2007; Lave & Wenger, 1991; Lewis, 2009; Sandlin & Bey, 2006).

Informal and incidental learning occur in all types of organizations and communities, including congregations. Findsen (2006) asserts the potential for significant learning in congregations through engagement in meaningful activities and relationships. In one example, the lay leaders of a Christian congregation studied by Fleischer (2006) experienced learning through their involvement in ministry practices, learning opportunities, and dialogue. Adults learn through participation in the life of a congregation. Music and engagement with sacred texts (Barnes, 2005), symbols (Barnes, 2005; Doerrer-Peacock, 2009), architecture (Doerrer-Peacock, 2009; Hirji, 2006), dialogue, coaching and mentoring (English, 1999b), and the practice of ministry (Fleischer, 2006) are all elements of congregational life that provide opportunities for informal and incidental learning.

Experiential learning is present and perhaps heightened during organizational change. Informal learning, in particular, is prevalent during organizational change (Alonderiene & Pundzienė, 2008). A transition in leadership is an organizational change and can significantly affect organizations (Ahearne, Lam, Mathieu, & Bolander, 2010; Beatty & Zajac, 1987; Cao, Maruping, & Takeuchi, 2006; Friedman & Saul, 1991; Friedman & Singh, 1989). Studies of

leadership transitions in business contexts reveal declines in employee performance (Ahearne et al., 2010), loss of market value (Beatty & Zajac, 1987), changes in organizational capabilities (Cao et al., 2006), turnovers of employees, effects on employee morale (Friedman & Saul, 1991), and changes in market performance (Kesner & Dalton, 1994). In nonprofit organizations, leadership transitions can leave boards fragmented and exhausted and place the organization itself at risk of instability and decline (Allison, 2002). The above examples and other related studies indicate leadership changes can profoundly change the life and culture of an organization (Ahearne, et al., 2010; Beatty & Zajac, 1987; Cao, et al., 2006; Friedman & Saul, 1991; Friedman & Singh, 1989).

Research on the effects of leadership transitions on individual members of organizations is scarce. In the literature search undertaken for this study, only one scholar in recent decades has empirically studied member impacts in business organizations (Farquhar, 1989; 1991), and only five scholars have addressed member impacts in congregations, although their scope has been primarily limited to examinations of unusual transitions or to narratives of pastors themselves (English, 1999a; Kratz, 2008; McClory, 1998; Wheeler, 2008; Wright, 2009). The need for further study of the impact of leadership transitions on organization members is evident.

In congregations, leadership changes can be moments in which congregants encounter new thoughts and feelings about their congregation and their faith (English, 1999a; Kratz, 2008). However, there is little empirical research on the effect of leadership transitions on congregations and their members. The existing research suggests factors such as theology (Loyd, 2009) and intentionality of processes (McClory, 1998) influence the characteristics of leadership transition. Additional research has suggested transition brings congregants face to face with different experiences, roles, and theology (English, 1999a; Kratz, 2008). English (1999a) found in her

study of four Roman Catholic parishes undergoing leadership transition, in these cases from ordained male priests to female lay pastors, congregants experienced informal and incidental learning about leadership, the roles of pastors and laity, and sacramental practice. She describes this learning as “changes in practical theological beliefs” occurring in stages (English, 1999a, p. 392). Similarly, Kratz (2008) explored how the presence of a new pastor in a congregation provides opportunities for learning as the new pastor brings prior experiences into conversation with the life ways of the congregation. Wheeler (2008), conducting a dissertation study on the process of leadership transitions in megachurches, found transitions may lead to negativity and exit on the part of longer-term community members. These studies highlight how leadership changes can impact congregations in multiple ways, but there has been no empirical study examining the impact of a change in lead pastors on individual congregants and their congregations in terms of their learning during the transition period.

Statement of the Problem

If learning occurs constantly through adults’ experiences in communities and organizations and is heightened by organizational change, then congregations are frequently sites of learning for their members (Beatty & Hayes, 1989). This learning can take place formally through congregational classes and instruction, as well as informally and incidentally through people's experiences of music, architecture, relationships and service. Informal and incidental learning are prevalent forms of learning in congregations. A study of the informal and incidental learning occurring during a non-routine incidence reveals the processes and dynamics of this learning in congregational life.

One particular non-routine incidence in the life of a congregation with potential for informal and incidental learning is a change of pastoral congregational leadership. A pastoral

leadership transition brings congregants face to face with different experiences, roles, and theology. As detailed above, research suggests leadership transitions present new and challenging experiences for individuals and organizations, yet research on how this occurs in congregations is scarce. Therefore, I have conducted a comparative case study of three Christian congregations experiencing congregational leadership transitions, during the period after a previous pastor has departed and before a new pastor has been employed, using qualitative methodologies to explore the presence, content, processes, and dimensions of informal and incidental adult learning in those congregations and their congregants.

Purpose of the Study

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, as the congregations experience a pastoral transition, during the period between the exit of a lead pastor and the employment of a successor. The questions that guided this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations, and probed the influence of organizational characteristics on learning.

To explore these questions, I utilized a multiple case study approach to examine three cases of congregations in leadership transition using interviews, observations, and document analysis. Case study methodology provided an avenue for studying congregants and congregations through multiple methods. Using three cases made it possible to explore the role congregational characteristics such as structure, demographics, and stated theology played in the informal learning of congregants during congregational leadership transitions.

Significance of the Study

Some aspects of leadership transitions have been studied empirically, yet there is little data on the effects of leadership transitions on individual members of organizations or in the context of congregations. In examining the informal and incidental learning of individual congregants during congregational leadership transitions, this study adds to the body of knowledge around experiential, informal and incidental adult learning during leadership transitions. Additionally, this study increases understanding of the applicability of the informal and incidental learning model in congregations, potentially highlighting how informal and incidental learning occur during various aspects of congregational life. This study offers those who lead and study congregations additional insight into congregational leadership transitions and the learning occurring during changes in the life of congregations. Since research indicates the effectiveness and impact of informal learning are greater when learning is supported, the findings from this study can equip leaders and scholars with knowledge they need to design interventions, or at minimum, intentionality around learning during periods of congregational transition.

Chapter Summary

Experiential learning theory suggests members of congregations inevitably learn through their experiences, including learning informally and incidentally through experiences of congregational change such as leadership transitions. The effects of leadership transitions on organizations can include changes in market value, stability, and employee turnover and retention, yet the effects of top-level leadership transition on individual members of organizations have rarely been explored. In congregations, research on leadership transitions has largely ignored the experiences of individual congregants. This study examined informal and incidental learning in three congregations experiencing leadership transitions in an attempt to fill this gap in the research.

Definitions

Active congregant An active congregant is a member of a congregation who attends services or participates in congregational events multiple times within a typical month.

Congregation A congregation is “a group of people who meet regularly (typically weekly or monthly) at a pre-announced time and location” for religious observance and other congregational activities (Religious Congregations and Membership Study, 2010).

Congregant A congregant is “a member of a congregation” (Merriam-Webster, 2013).

Incidental learning Incidental learning is a subset of informal learning, “a byproduct of some other activity, such as task accomplishment, interpersonal interactions, sensing the organizational culture, or trial-and-error experimentation” (Marsick & Watkins, 1990, p. 7).

Informal learning Informal learning takes place outside of a dedicated learning environment and arises from the activities and interests of individuals and groups (McGivney, 1999).

Leadership transition A leadership transition is a change of leaders in an organization and encompasses a period beginning when the organization becomes aware a change is coming and ends when a new leader has been successfully employed and retained by the organization (Adapted from Adams, 1998; Neighborhood Reinvestment Corporation, 1998).

CHAPTER 2

REVIEW OF THE LITERATURE

Introduction

The intersection of informal and incidental learning with leadership transition is a fascinating if little studied one. As detailed in the following sections, informal learning, or learning that takes place outside of a formal learning environment, and incidental learning, or that subset of informal learning that occurs as a byproduct of other activities, have been studied in communities, organizations, and congregations. The literature on informal and incidental learning highlights how learning often occurs informally through adults' experiences in communities and organizations, particularly through new experiences and periods of change and transition. The literature on leadership transition addresses business, nonprofit, and congregational contexts. I found numerous studies on the effects of leadership transitions in organizations addressing costs, market value, organizational stability, detailed extensively in the following sections on leadership transition, yet few studies on the effects of leadership transitions on individual members and stakeholders of those organizations. Only one scholar in recent decades has empirically studied member impacts in business organizations (Farquhar, 1989; 1991). Only five scholars have addressed member impacts in congregations, although their scope has been primarily limited to examinations of nonconventional transitions or narratives of pastors themselves (English, 1999a; Kratz, 2008; McClory, 1998; Wheeler, 2008; Wright, 2009).

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition, during the

period between the exit of a lead pastor and the employment of a successor. The questions guiding this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations, and probed the influence of organizational characteristics on learning.

To explore these questions, I utilized a multiple case study of three dissimilar congregations experiencing a congregational leadership transition. This study examined three cases of congregations during their leadership transition using interviews, observations, and document analysis. Case study provided an avenue for studying congregants' informal learning through multiple methods. Using three cases supplied a mechanism for exploring the role of congregational characteristics such as structure, demographics, and stated theology in the informal and incidental learning of congregants during congregational leadership transitions.

In this review of the relevant literature, I examined the literature relating to informal and incidental learning in communities and organizations, including businesses, nonprofits, and congregations, and the literature around leadership transitions in the same contexts. This literature review is designed to highlight current theory and research in these areas, particularly

as it connects to this study in examining how and what adults learn informally and incidentally during leadership transitions in congregations.

Literature Search Methodology

The literature review was conducted by searching academic databases including Academic Search Complete, Business Search Complete, ATLAS, and digital catalogs of theses and dissertations, including UGA Theses and Dissertations and Proquest, using certain keywords. Keywords included “informal learning,” “incidental learning,” “learning in congregations,” “executive succession,” “leadership transitions,” and “pastoral transitions.” I searched for these and related keywords on search engines such as Google Scholar. I then used the located materials, including articles, books, and dissertations, as sources of additional resources by examining their reference lists. I first organized sources using a spreadsheet to categorize them by topic, type of research, and findings (if applicable). Once the sources became quite numerous, I began to organize them simply by annotating them in a series of documents and handwritten notes.

Experiential Learning

Models of informal and incidental learning are rooted in the concept of experiential learning (Cherrington & Van Ments, 1994). Experiential learning describes the process by which knowledge is constructed out of experience as individuals continuously test their ideas and hypotheses against their experiences in the world (Dewey, 1938/1997; Vygotskiĭ, 1978). Learning thus arises from everyday experiences in work or life and is found throughout the lives of individuals. According to Fenwick (2000), experiential learning can be seen in many aspects of life - in the process of reflection on experience, in the interference new experiences cause in

previous understandings, in participation in activities, in the tension of resistance to new understandings, and in the co-emergence of both cognitive and sensory processes.

Philosophers throughout history such as Aristotle, Locke, and Mill all asserted the role of experience and self-education in learning (Sawchuk, 2008), and formal experiential learning theory was first developed in the 1950s with the work of Lewin and Dewey (Dewey, 1938/1997; Lewin, 1946). Dewey (1938/1997) saw all education as occurring through experience, describing experience as having two dimensions—active and passive—and describing experiential learning as connecting with both past experiences and future knowledge. Lewin (1946) framed experiential learning in stages moving from experience to reflection and back to experience. According to Kolb (1984), another scholar of experiential learning, experiential learning typically involves stages such as concrete experience, observations and reflections within an experience, the formation of abstract concepts and generalizations regarding an experience, and testing the implications of those concepts in new situations. Schön identified two aspects of experiential learning - knowing in action, which is the tacit, unconscious and unarticulated knowledge people use to take action, and reflection in action, which involves reflecting on current knowledge when acting and problem solving in new situations (Schön, 1983). The experiences, social contexts, needs, and choices of individuals continually create layers of learning (Cairns, 2000). Experiential learning intensifies when, personally or organizationally, economic and emotional survival is at stake (Fenwick, 2000). When experiential learning has occurred, the learner will demonstrate new patterns of behavior, strategies, expectations, and outcomes (Kolb, 1984). Experiential learning is a process that is both formal and informal, practical and particular, affective and social (Beckett & Hager, 2000). Two subsets of

experiential learning are informal learning, or learning outside of structured educational settings, and incidental learning, or learning which unconsciously takes place through certain experiences.

Informal Learning

Informal learning is a subset of experiential learning. Informal learning can be defined as “any activity involving the pursuit of understanding knowledge or skill which occurs without the presence of externally imposed curricular criteria...in any context outside the pre-established curricula of educative institutions” (Livingstone, 2001, p. 4), and without a teacher or external structure (Livingstone, 2005). According to Marsick, Volpe, and Watkins (1999), informal learning is increasingly a part of the lives of individuals and organizations. The early case studies of Tough (1971) found over two-thirds of adults’ intentional learning happened outside of formal educational programs (Livingstone, 2001). Work on self-directed learning identified a large portion of learning occurring independently of formal educational programs (Candy, 1991; Brockett & Hiemstra, 1991; Brookfield, 1981). These findings were substantiated by large-scale survey research such as the New Approaches to Lifelong Learning (NALL) and General Social Survey (GSS) surveys in Canada (Livingstone, 2001), which found community service, religious involvement, and other leisure time commitments to be important sites of informal learning. Informal learning encompasses many kinds of learning such as networking, coaching, mentoring, and self-directed learning (Marsick & Watkins, 2001). Life events are common sources of informal learning (Merriam & Clark, 1993) during all stages of life (Schugurensky, 2000). As English (2000) noted, informal and incidental learning are inherent in the context of adult learners.

Informal learning is more specific than nonformal learning, or all learning which takes place outside a formal learning context (Eraut, 2000). Informal learning takes place outside

learning structures (European Commission on Lifelong Learning, 2001) and is not determined or designed by an organization (Day, 1998). Some scholars assert informal learning is the standard form of learning, requiring no special label other than learning (Billett, 2001). Other scholars argue formal and informal learning take place on a continuum, rather than existing as separate categories (Stern & Sommerlad, 1999; Watkins & Marsick, 1993). Colley, Hodkinson and Malcolm (2003) found the relationship between informal and formal learning more nuanced, with informal learning often occurring in formal settings, and the two being more of a continuum than a dichotomy. Marsick and Watkins (2001) agreed, stating informal learning “in practice, is often more of an ebb and flow as people begin to make sense of a situation” (p. 29). Although taking place outside of structured learning activities, informal learning may be either planned or unplanned (Marsick & Watkins, 1990; 2001), and intentional or unintentional (European Commission on Lifelong Learning, 2001). Marsick and Watkins (2001) observed, “informal learning is usually intentional but not highly structured” (p. 25).

Informal and incidental learning occur when unexpected dissonances or situations arise challenging a person's previously understood knowledge and force them to determine new strategies and actions which are then tested to further their new understandings (Marsick & Watkins, 2001). The cycle of informal learning involves returning to and questioning earlier knowledge and beliefs as the new knowledge is integrated, either consciously or unconsciously (Marsick & Watkins, 2001). According to Schugurensky (2000), informal learning can simply add knowledge and skills or lead to personal transformation.

Scholars differ in their models and conceptions of the dynamics of informal learning. One model of informal learning, proposed by Knud Illeris and Associates, describes the intersection of environmental, cognitive, and emotional dimensions of individual learning (Sawchuk, 2008).

The individual's psychological capital, described as their self-efficacy, hope, optimism and resilience, influences informal learning (Luthans et al., 2007). Informal learning can be more common (Marsick & Watkins, 2014) and more effective than formal learning, in its holistic nature and basis in context, activity, and experience (Beckett & Hager, 2002). Informal learning can be characterized as more internally controlled and determined by the learner, and thus more democratic and more empowering than formal learning (Colley, Hodkinson & Malcolm, 2002). Some scholars are less positive about the advantages of informal learning, as evidenced by Marsick, Volpe, and Watkins' (1999) call for structures to support informal learning to increase its effectiveness.

Incidental Learning

Non-intentional informal learning is labeled as incidental learning (European Commission on Lifelong Learning, 2001). Incidental learning describes a type of informal learning in which people acquire knowledge they did not set out to obtain. Incidental learning can occur through mistakes or experiences that cause learners to reorient their assumptions and beliefs based on new knowledge (Marsick, et al., 1999). According to Straka (2004) and Colardyn and Bjornavold (2005), incidental learning is generally non-intentional and random. Incidental learning occurs constantly at varying levels of consciousness (English, 1999b) and can go unrecognized in the learner (Stern & Sommerlad, 1999). Yet Schugurensky (2000) defined incidental learning as "unintentional but conscious" (p. 4). In a possible explanation for this dichotomy, Eraut (2004) said people only become aware of incidental learning after it occurs. Incidental learning, like informal learning, can occur in any context in which people live and have experiences.

It is challenging to study informal learning to increase understanding of how it takes place. According to English, it can be difficult for learners to articulate informal and incidental learning even if it has occurred (English, 1999b). Other scholars agree that participation in and consequences of informal learning can be difficult to measure (Gorard, Fevre, & Rees, 1999). Individuals, and women more so than men, are reluctant to label activities as learning even when those activities have been transformative (Gorard, et al., 1999).

Marsick and Watkins' Model of Informal and Incidental Learning

Marsick and Watkins (2001) provide a model of both informal and incidental learning highlighting all the unintentional and unconscious learning in workplaces and daily lives, including by-products of other learning experiences. Marsick and Watkins developed this model in 1990 out of the thinking of Dewey, Argyris and Schon, and have since adapted the model to the form seen below in Figure 1 through their subsequent collaboration with Cseh (Marsick and Watkins, 2001) and Nicolaidis (Marsick, Nicolaidis, & Watkins, 2014).

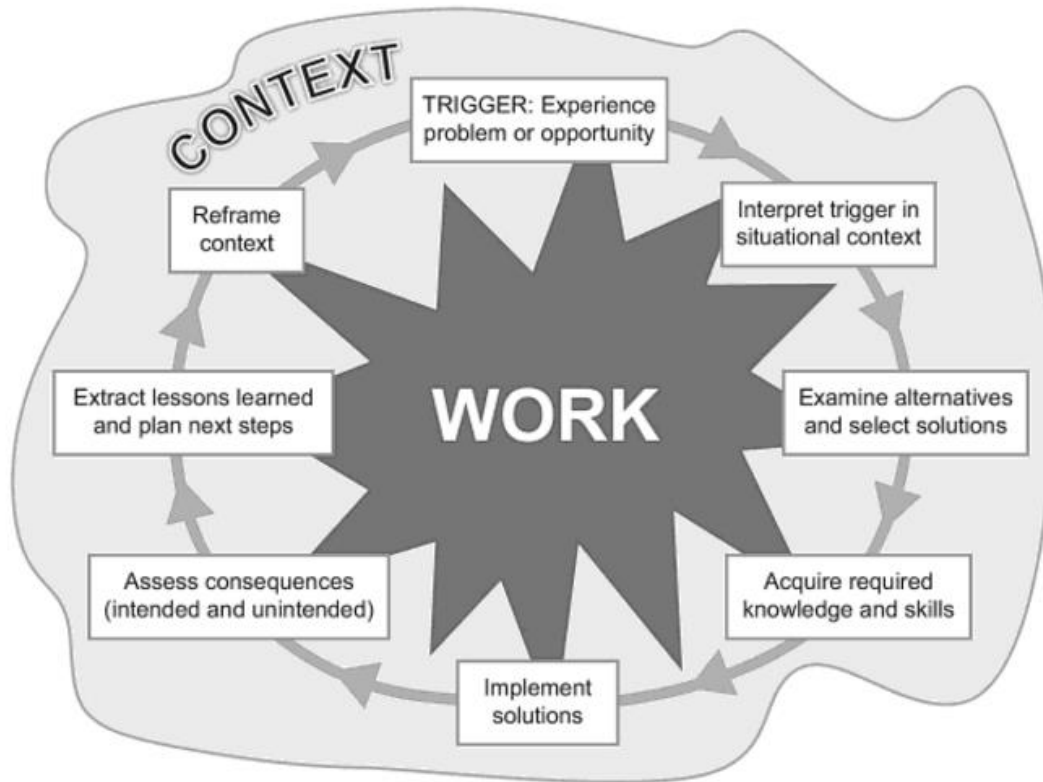


Figure 1. Marsick and Watkins’s informal and incidental learning model (Marsick, Nicolaides, & Watkins, 2014)

As Marsick and Watkins explain, learning grows out of the context of experiences occurring every day, represented by the center circle (Marsick & Watkins, 2001), with the larger outer circle representing the greater personal, social, business, and cultural context within which the experience occurs. The steps around the circle represent a cycle of making meaning which, rather than progressing forward in one direction, “ebbs and flows” back and forth among these phases as learners make sense out of new experiences (Marsick & Watkins, 2001, p. 29). Certain triggers are generally the impetus for learning, with unexpected events or experiences initiating the informal and incidental learning process (Marsick & Watkins, 2001). Learners then assess

the surprising or problematic or challenging trigger, holding it up against prior experiences to determine commonalities or concepts help them make sense of the new experience (Marsick & Watkins, 2001). Context is a constant influence on this process, as the learner interacts with their environment and the people in it (Marsick & Watkins, 2001). These interactions lead the learner to search their capabilities, their knowledge of past experiences and their awareness of potential actions to choose a response (Marsick & Watkins, 2001). The learner may need to acquire new skills or cultivate additional resources for action, and the learner may be impacted by the availability of resources and knowledge as well as their own willingness, motivation, and emotional capacity (Marsick & Watkins, 2001). The learner's action then necessitates assessment of outcomes and readjustment if necessary, changing future actions to reflect new knowledge gained (Marsick & Watkins, 2001). Pre-existing frames of reference, or assumptions and expectations that shape our interpretations of experiences, permeate every stage of the informal and incidental learning process (Wofford, 2011).

Informal and Incidental Learning in Context

Informal and incidental learning are primarily individual in nature, yet experiences leading to learning happen in all the contexts of life (Fenwick, English, & Penwick, 2000; White, 2005). According to Billett (2001), social organizations and communities, including workplaces, are primary sites of learning. Schugurensky (2000) observed informal learning can occur anywhere, including workplaces, religious institutions, and communities as potential sites for informal learning. Although all informal learning shares certain qualities, context can affect both the content and operation of informal learning (Ellinger & Cseh, 2007). The context of learning is made up of personal knowledge, motivations, and expectations; sociocultural factors such as

culture, language, history, and values; and physical factors such as environment, physical structures, comfort, and safety (Domizi, 2008).

Informal and incidental learning in communities. Theories of learning in community outline the learning taking place in communities of shared beliefs and practices. These concepts are derived from the ideas of constructivism, experiential learning, and situated learning. Vygotskiĭ (1978), for example, emphasized the role of social and cultural contexts in learning, including shared activities, knowledge, environment, beliefs, values, and symbols, in shaping adult learning. Informal learning in community can involve many aspects of community life, including shared practices, activities, spaces, and characteristics. Vygotskiĭ (1978) saw social interaction as one of the fundamentals of development. According to Vygotskiĭ (1978), learning in community is rooted in the use of cultural tools mediating communities and social environments. Wenger (1998) identified social practice as the primary site of all learning. Fenwick (2003) likewise connected learning in community with the experiences of individuals in their communities. As de Carteret (2008) observed, “a place-conscious approach to informal learning allows exploration of nuances and interconnections of social context, local responses to global trends, and the physical environment” (p. 513).

Informal learning can involve many aspects of community life, including shared practices, activities, spaces, and characteristics (de Carteret, 2008; Kilpatrick, 2002; Lange, 2007; Lawrence, 2008; Lewis, 2009; Sandlin & Bey, 2006). Communities formed around a particular occupation can function as places of learning and building social capital (Kilpatrick, 2002). Dances and markets in a geographical center can provide opportunities for informal learning and socialization (de Carteret, 2008). School environments (Fewell, 2002), work communities (Sandlin & Bey, 2006), groups of patients who share a medical diagnosis (Lewis,

2009), and travel groups (Lange, 2007) can similarly engage participants in learning, at times transformative, resulting from community interaction. Individuals learn through leisure activities and in learning, experience changes in their skills and language as well as in their personal development (Pruitt, 2004). Engagement with art (Lawrence, 2008) and participation in shared experience or practice (Kilpatrick, 2002; Lange, 2007; Lewis, 2009; Sandlin & Bey, 2006) are frequently identified as additional environments for learning in community.

Certain activities and conditions can promote learning in community environments, Lawrence (2008) noted, “creating opportunities to surface this knowledge” through community experiences (p. 75). People learn in communities when working to achieve common goals (Merriam, Caffarella, & Baumgartner, 2007) and through participation in activism and social action (Kovan & Dirkx, 2003; Parrish & Taylor, 2007). This learning is “grounded in a being in the world and oriented toward developing a deeper understanding of both one’s self and the world of which self is a part” (Kovan & Dirkx, 2003, p. 110). Lave and Wenger (1991) similarly found social interaction and collaboration essential to learning. The deeper a learner’s engagement with a community, the more they will likely learn (Lave & Wenger, 1991).

Informal and incidental learning in organizations. Informal learning occurs in the organizations making up communities, from businesses to non-profits to congregations (Easterby-Smith, Araujo, & Burgoyne, 1999). Informal learning is potentially the prevalent form of learning in organizational environments (Bolt, 2008), making up 70-80% of learning at work (Marsick & Watkins, 2014). The research of Bolt (2008) supports informal learning as the prevalent method of learning in the workplace. According to Doornbos, Simoons, and Denessen (2008), learning in business organizations “does not take place within or follow from a formally organized learning program or event but instead happens explicitly and implicitly via various

work-related and social interactions” (p. 130). Ellinger and Cseh (2007) highlighted how informal and incidental learning can occur in workplaces through many activities, including self-directed learning, trial and error, networking, coaching, mentoring and other involvement with coworkers or tasks. Ross-Gordon and Dowling (1995) found that members learned through their work with the organization, in the areas of skills, abilities, and sense of self. Engagement with consumers or other members of the organization is another source of informal learning in organizations (Findsen, 2006; Foley, 1993).

Informal learning can take place through experiences of change and can be a form of learning about organizational change and developing change skills (Alonderiene & Pundziene, 2008). According to Alonderiene and Pundziene (2008), managers learn to manage change by first experiencing change and then learning informally from those experiences. Individuals can learn through workplace transitions, including leadership transitions (Marsick & Watkins, 2001), if adequate support and facilitation are present for learning (Balan, 2005; Tyler, 2005). Informal learning is the most common way people learn about organizational change (Alonderiene & Pundziene, 2008). Members of an organization who seek out informal learning are, in fact, better equipped to manage organizational transition and change (Dechant, 1999).

Member learning. Organizational learning explores how individuals learn in organizations. The concept of organizational learning formally developed in recent decades (Easterby-Smith, Araujo & Burgoyne, 1999), focusing on processing and interpreting information as the technical aspects of organizational learning (Argyris & Schon, 1978; Smith, 2001) and focusing on the way members of the organization make sense of their experiences and interactions as the social aspects of organizational learning. (Lave & Wenger, 1991; Smith, 2001). Organizational learning is usually defined by learning from experience (Prange, 1999).

Notable scholars of organizational learning, Argyris and Schon (1996), explain how learners move beyond mere correction of mistakes into deeper reflection and learning in their model of single and double loop learning. Individuals in organizations learn from making, detecting, and correcting errors, incrementally changing the organization of which they are a part (Argyris & Schon, 1978). Individuals in organizations each have their own piece of the entire picture of the organization (Argyris & Schon, 1978). Unfortunately, if an individual frames a problem incorrectly, all of their learning and response could be pointed in the wrong direction (Marsick, Nicolaidis & Watkins, 2014). According to Argyris and Schon (1978), individuals learn by reflecting on the way their ideas about the organization are actualized within it as they continually organize their ideas within and about the organization (Smith, 2001). Organizational factors such as trust, culture, structure, communication, and leadership practices can create an environment that support this learning (Marsick & Watkins, 2014).

Organizations that learn. Organizational learning can be seen as individual or systemic (Salomon, 1993), because organizations themselves can be said to learn. According to Watkins and Marsick (2010), the roots of group learning theory derive from theories of group dynamics in social and organizational psychology. Organizations learn when the behavior of the members changes in response to environmental and organizational experiences and change (Rhodes, 1996). Ziegler (1999) found informal learning equipped a company with new insights and behaviors. Changes in the behavior of organization members inevitably change the culture of the organization itself (Argyris & Schon, 1978). Kasl, Marsick, and Dechant (1997) assert that groups learn through framing/re-framing, experimenting, crossing boundaries, and integrating perspectives. Lewin's (1951) theory of action research suggests groups can learn by working on meaningful problems together. Group learning occurs through opportunities to contribute to

valued communities, to integrate their values into individual values, and to creatively reuse their ideas and beliefs (Wenger, 1998).

A particular type of organization cultivates this type of learning as described by Lave and Wenger's (1991) concept of a learning organization. A learning organization (Senge, 1990) is an organization which learns effectively as a part of their culture through personal mastery, team learning, mental models, shared vision, and systems thinking. This conscious attention to learning is necessary since the rarity of organization-wide high stakes events and the lack of cohesion within organizations can be significant barriers to learning (Salomon & Perkins, 1998). Learning organizations promote an environment that combats other barriers to learning such as tunnel vision and low risk-taking due to prior bad or unrewarded experiences (Marsick & Watkins, 1994).

Organizations that build infrastructure for strategic learning can improve organizational performance (Marsick & Watkins, 2003; 2014). Song and Kolb (2009) found that learning organization culture improves the impact of knowledge creation in organizational members. Learning organizations will need to build skills in problem solving, experimentation, learning from past experiences of self and others, and transferring knowledge among organizational members (Garvin, 1993). Learning organization infrastructure might include access to learning resources, shaping learning environments, and designing architectures to recognize and support informal learning (Marsick & Watkins, 2014). To build a learning organization, an organization must foster a learning-ready environment free of boundaries to exchanging ideas (Garvin, 1993; Hawkins, 1997).

Communities of practice. Another model of organizational learning is the community of practice. This concept is derived from the work of Wenger, McDermott, and Snyder (2002), who

describe communities of practice as communities formed around a particular domain and practice within which adult learning can take place. Wenger (2006) further defined communities of practice as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (para. 4). Communities formed around a particular domain and set of practices have greater potential for experiential learning (Wenger, et al., 2002). This concept emphasizes the role of shared contexts in adult learning, particularly highlighting shared activities, beliefs, values, and symbols (Wenger, 1998).

Scholars define communities of practice in various ways. Communities of practice are described as informal groups rather than task forces or teams (Brown & Duguid, 1991). Wenger (1998) sees communities of practice as defined by a shared pursuit over time allows room for them to develop in both formal and informal organizational settings. Hakkarainen, Palonen, Paavola, and Lehtinen (2004) suggest the defining feature of communities of practice is the network of people interacting routinely for shared goals. Communities of practice can be characterized by shared meanings negotiated among their members (Desikan, 2009).

Three elements are likely the most consistent signifiers of communities of practice: domain, community, and practice (Wenger et al., 2002). According to Wenger et al. (2002), communities of practice “share a concern, a set of problems, or a passion about a topic and ...deepen their knowledge and expertise in this area by interacting on an ongoing basis” (p. 4). Communities of practice are distinctive in their shared domain of knowledge, a community cares about the shared domain, and practices aid them in working in the shared domain (Wenger et al., 2002). The domain contributes a sense of identity around issues regularly experienced by members, the community fosters respect and trust, and the practices occur through meaning

making, relationships, accountability, and learning, bounded by locality or shared context (Wenger, 1998).

The idea of learning in communities of practice emphasizes the role of social and cultural contexts in shaping adult learning, including shared activities, knowledge, environment, beliefs, values, and symbols. Individual learning in communities of practice occurs when individuals move from novice to expert (Lave & Wenger, 1991) or from a community's periphery to its core (Wenger, 1998) and learn through experience and reflection throughout this process (Bussye, Wesley, & Able-Boone, 2001). Merriam, Courtenay, and Baumgartner (2003) highlight the potential for experiential learning in a community of practice. Individuals learn in communities of practice through participation in informal networks (Lave & Wenger, 1991), collaborative problem solving and sharing information, experiences and assets in pursuit of common goals (Wenger, 1998). Communities of practice promote learning, evolve, and reproduce through actions interwoven with culture and history (Lave & Wenger, 1991) such as developing group culture around their history, artifacts, language, shared beliefs, and group norms (Schlager & Fusco, 2002).

Communities of practice are inclusive of both long-time members and newcomers, frequent participants and those who participate infrequently. In communities of practice, learning characterizes the process of becoming a full member (Lave & Wenger, 1991). The concept of legitimate peripheral participation describes how new members of communities begin participating in a community on its edges and then, assisted by others with more knowledge, acquire the knowledge and practices of older members of the community (Lave & Wenger, 1991). Legitimate peripheral participation is learning from belonging by learning the practices, norms, beliefs, and values of a community to belong (Lave & Wenger, 1991). Although some

members of a community of practice contribute greatly and regularly, others participate less frequently, and are called “lurkers” by Mcdermott (2001).

Factors in organizational learning. Certain organizational structures and mechanisms impact informal workplace learning, including internet usage, collegial relationships and proximity, worker characteristics, and levels of work pressure (Doornbos, Simoons & Denessen, 2008; Lohman, 2009). Organizational climate and culture, individual characteristics, available resources, and opportunity for critical reflection can all impact informal and incidental learning (Marsick & Watkins, 2003). Similarly, structural factors in community organizations, such as collaboration (Fleischer, 2006) and opportunities for knowledge sharing and critical reflection (Doerrer-Peacock, 2009; Lawrence, 2008; Mercer, 2006; Price, 2004), can support informal learning. Some individuals have tendencies making informal and incidental learning more likely (Marsick et al., 1999). Informal learning in workplaces may be more prevalent among women, as they must learn on their own when their values are not valued by their organizations and they are unable to access all the information controlled by men (Bierema, 1999). This could mean organizational members with outsider status may be more open to informal learning.

Even for those individuals who tend towards informal learning, organizational supports such as providing time, space and supports for surfacing and reflecting on learning are key (Marsick et al., 1999). Often, the attitudes of leaders and managers in business and community organizations are key in promoting informal learning (Boud, Rooney, & Solomon, 2009; Ellinger & Cseh, 1997). According to Ellinger and Cseh (2007), an organizational culture that promotes informal learning is aware of triggers for learning and prepared to communicate, question, give feedback and otherwise promote learning. People learn informally from challenging experiences, and formal training can prepare people for challenges and the resulting learning (Cseh, 2002).

Bolt (2008) advocated linking informal learning to organizations' formal learning structures. Informal and incidental learning can then serve as partners to formal learning (Perrin & Marsick, 2012). Boud et al. (2009) similarly advised working to link informal learning to formal organizational learning structures, but caution this work must be handled carefully or it can actually impede the benefits of the informal learning. As Boud et al. (2009) note, learning in organizations "will require managers to rethink how learning happens at work," a much more broad endeavor than simply taking advantage of existing informal learning channels (p. 333). Marsick and Watkins (2014) highlight the need for more research on how organizations can support informal learning.

Informal and incidental learning in congregations. In the NALL survey, 41% of respondents reported participating in informal learning relating to religion and spirituality (Livingstone, 2001), identifying congregations as a potential site of informal learning. Congregations can function as organizations, but can also function as communities; thus the research on informal learning in organizations and informal learning in communities is all applicable in the congregational context. An organization can be defined as "a structured social system consisting of groups and individuals working together to meet some agreed on objectives" (Greenberg & Baron, 1995, p. 11). Congregations function as organizations when they pursue shared purposes such as worship, education, church growth, or community outreach. Communities are groups of people bound by interaction, common geography, and social ties (MacQueen, et al., 2001). Distinguishing characteristics of community include membership, influence, fulfilling each other's needs, and connecting emotionally (McMillan & Chavis, 1986). All persons in a community do not experience the same feelings of membership, and those who do tend to have experienced integration into the community, fulfillment of needs within the

community, and shared emotional connection with others in the community (MacQueen, et al., 2001). Therefore, congregations function as communities when they are made up of people who interact in a common location, experience social ties and emotional connections with each other, and fulfill some needs for one another.

Congregations can function as communities of practice and learning organizations. The community of practice model as defined above could apply to many congregations, since they are driven by commonalities of belief and practice in an environment pursuing particular goals (Fleischer, 2006; Merriam et al., 2003). Merriam et al. (2003) described a Wiccan faith group functioning as a community of practice. Some congregations make commitments to learning together in structured and systemic ways, thus becoming learning organizations (Fleischer, 2006; Price, 2004). Panosh (2008) found that churches exhibit the attributes of learning organizations, and that the greater these attributes in a congregation, the better the congregational performance as measured by attendance. A Christian congregation studied by Fleischer (2006) demonstrated the positive individual learning results of a learning community when congregation leaders shared involvement in activities, learning opportunities, and dialogue. Price (2004) noted learning congregations can promote critical reflection and higher order thinking among members regardless of cognitive abilities (Price, 2004). Price cautioned that learning congregations require at least some flexible thinkers, although all can benefit from the spiritual learning without prerequisites of particular cognitive abilities (Price, 2004). Yet learning communities, or “groups of people engaged in intellectual interaction for the purpose of learning,” have not been found in large numbers of congregations.

Research on informal learning in congregations sheds light on congregations as a unique environment within which informal learning occurs. Congregations can promote spiritual

encounters and spiritual learning. Davis (2007) concluded spiritual encounters often serve as incidental, informal, and non-formal adult learning. Informal learning intersects with spirituality when congregants depend on each other and make personal connections to construct meaning together (English, 2000). English (2000) informal and incidental learning experiences can be an important support for spiritual learning. Congregations can require creativity from members. Luckie (2005) highlighted the potential of religious community and creative engagement therein as sites of incidental learning. Congregations often have members across ages and life stages. Findsen (2006) observed the potential for significant learning in older adults who participate in social institutions such as churches through engagement in meaningful activities and relationships, and Everist (2001) noted how religious communities can aid adults in their vocational development.

The practices of congregations impact the learning of their members. Adults can learn informally through participation in religious communities through music (Barnes, 2005), symbols (Barnes, 2005; Doerrer-Peacock, 2009), engagement with sacred texts (Barnes, 2005), architecture (Doerrer-Peacock, 2009; Hirji, 2006), dialogue, coaching and mentoring (English, 1999b), and the practice of ministry (Fleischer, 2006). Congregants learn during times of transition (English, 1999a; Kratz, 2008; McClory, 1998; Wright, 2009), as documented in the following sections. According to Fleischer (2006), two prevalent vehicles for learning in the congregational context are the informal interactions between team members and the practice of ministry. Congregational leaders learn informally through problem solving and responding to the expectations of their congregations and larger communities of faith and residence (Harrison, 2010). Opportunities for informal learning are strengthened by opportunities for critical reflection and shared meaning-making (Doerrer-Peacock, 2009; Mercer, 2006; Price, 2004), yet

structures and attitudes promoting informal learning can be rare in congregations (Davis, 2007; Crain & Seymour, 1997). A summary of the research on informal and incidental learning in congregations is presented in Table 1, below.

Table 1

Research on Informal and Incidental Learning in Congregations

Author	Year	Context	Population	Sample	Methodology	Conclusions
Barnes	2005	Congregations	Black churches	1863	Survey	Member learning from gospel music and other cultural symbols such as those historically linked to group solidarity, liberation themes, racial dynamics and the need for social justice, was correlated with church involvement in socio-political community events.
Crain, Seymour	1997	Congregations	Adult Laity	11	Participatory Ethnography	Theology and use of their own resources to make meaning informed the daily living of lay members in their struggle to understand how to be faithful.
Davis	2007	Congregations	Adult Laity	12	Interviews, Document Based	Contextual spiritual learning experiences of laity are associated with an experience of peace.
Doerrer-Peacock	2009	Congregations	Congregation	1	Narrative Inquiry	Space, story, and symbol are sources of learning and transformation, changing meaning narratives within a congregation.
English	1999	Congregations	Roman Catholic parishes	4	Observation, Interview	Dialogue, networking, coaching and modeling from pastors is a source of informal learning in Roman Catholic parishes.
Everist	2001	Learning Groups	Adult Laity	3	Case Descriptions	Laity learn from hearing from each other about the role of their faith in their vocational lives.
Fleischer	2006	Congregations	African-American Catholic lay pastoral leaders	46	Interviews, Surveys	The primary vehicle for learning among congregational lay leaders was involvement in the practice of ministry with other members and leaders. Dialogue with others supported this learning.

Leadership Transitions

Executive or CEO succession and leadership transition, a subject of much research and writing in previous decades, has been less prevalent in the recent literature on businesses,

nonprofits, and congregations. There has been no synthesis or comprehensive examination of succession and transition literature in over 20 years (Zajac, 1990). Yet in recent years, the increasing turnover of leaders in all sectors means the topic remains relevant to practitioners and researchers alike.

For the purposes of this study, executive succession and leadership transition are conceptualized as a change in leadership at the top of an organizational hierarchy. Changes can include titles such as CEO, Executive Director, Head or Lead Pastor as well as individuals fulfilling similar roles in organizations regardless of title. The temporal boundaries of executive succession and leadership transition can extend out from the transition itself into a pre-succession period of several years and a post-succession period of several years (Neighborhood Reinvestment Corporation, 1998) and may include an interim period between the departure of the previous leader and the tenure of the new leader. The organizational experience of succession or leadership transition includes the experiences of the organization as well as all its stakeholders: the outgoing and incoming leaders, other organizational leaders or managers, employees or members, investors, and the general public.

From the seminal studies by Gouldner (1954) and Guest (1962) to the special issue of Human Resource Management devoted to the topic in 1986, studies of succession focused primarily on succession as an orderly process (Farquhar, 1995). In recent decades, an acknowledgment of the complexity of succession events has led to a shift toward the concept of a long and potentially disorderly leadership transition occurring in a variety of contexts (Farquhar, 1995).

Leadership transitions have been found to have far-reaching effects on organizations (Ahearne, Lam, Mathieu, & Bolander, 2010; Beatty & Zajac, 1987; Cao, Maruping, & Takeuchi,

2006; Friedman & Saul, 1991; Friedman & Singh, 1989). Leadership transition can be defined as a change of leaders in an organization, encompassing a period from when the organization becomes aware a change is coming until such time a new leader has been successfully employed by the organization (Neighborhood Reinvestment Corporation, 1998). Effects of leadership transitions on businesses include declines in employee performance (Ahearne et al., 2010), loss of market value (Beatty & Zajac, 1987), changes in organizational capabilities (Cao et al., 2006), departure of employees, changes in employee morale (Friedman & Saul, 1991), and changes in market performance (Kesner & Dalton, 1994). Nonprofit organizations are another site demonstrating the impact of leadership transitions on organizations. According to Allison (2002), leadership transitions can leave nonprofit boards fragmented and exhausted and place the organization itself at risk of instability and decline. The above examples indicate leadership changes can be a significant type of change in the life and culture of an organization.

Concepts of Leadership Transition

Leadership transition is conceptualized in multiple ways in the scholarly literature. Early scholars in the area of succession proposed models regarding the effects of leadership transition. The disruption hypothesis, advanced by Grusky (1960), suggests leadership transition destabilizes organizations and can disrupt relationships and patterns of activity (Friedman & Singh, 1989). Guest's (1962) findings, on the other hand, indicated succession leads to improved organizational performance. Yet Gameson and Scotch (1964) found no relationship between succession and performance.

More recently, Farquhar (1996) proposed a typology of leadership transitions outlining the unique qualities of non-routine leadership transitions such as traumatic, performance-based, conflict-based, and scandal-driven transitions. Farquhar (1996) notes traumatic transitions can

result in loss or grieving, performance-based transition can cause blaming and unrealistic expectations, and conflict-based and scandal-driven transitions can lead to or reinforce organizational dysfunction, schism and division. Thus, the effects of leadership transition are dependent on the circumstances of the transition itself. Research has bolstered the strength of the contextual models, finding organizational and environmental context (Friedman & Singh 1989; Kesner & Dalton 1994; Lant, Milliken, & Batra, 1992; Virany, Tushman, & Romanelli, 1992), organizational health (Beatty & Zajac, 1987; Carroll, 1984; Friedman & Saul, 1991; Guest, 1962) and outgoing leader performance (Weiner & Mahoney, 1981) are important factors in the effects of leadership transition on an organization.

Other scholarship conceptualizes leadership transition as an event, as a shift in personal traits, and as a change in social structure. Leadership transition, when framed as an event, can be analyzed temporally as well as in terms of the nature of the event and those involved. Gordon and Rosen (1981) focused on the temporal, emphasizing the pre- and post- arrival periods as units of analysis. Framing the transition in terms of the nature of the event itself shifts focus to whether the transition is voluntary or forced (Denis & Denis, 1995; Parrino, 1997; Wiersema, 2002) and whether the incoming leader is an insider or outsider to the organization (Allen, Panian, & Lotz, 1979; Helmich & Brown, 1972; Parrino, 1997; Shen & Cannella, 2002; Zajac, 1990; Zhang & Rajagopalan, 2004). Similarly, leadership transitions can be conceptualized as a shift in leadership, managerial and personal traits as the company transitions from the outgoing to the incoming leader, focusing on the impact of those traits on the organization and its members (Argyris, 1952; Fama, 1980; Finkelstein & Hambrick, 1996; Hambrick & Mason, 1984; Guest, 1962; Gouldner, 1954; Koch, 1978; Strober, 1990). In one of the few recent examinations of the concepts underlying leadership transition, Cao, Maruping & Takeuchi

(2006) suggest examinations of leadership transition should move beyond viewing the incoming and outgoing leaders as managerial agents or organizational resources toward a view of the transition as a shift in social structure. This view, like the idea of leadership transition as a shift in traits, focuses on the outgoing and incoming leaders, but specifically on the resource networks they bring with them to and from the organization (Cao, Maruping & Takeuchi, 2006).

Leadership Transitions in Business

The effects of leadership transition in businesses are presented in the literature as wide ranging and including changes in value and performance (Beatty & Zajac, 1987; Buoziute-Rafanaviciene, Pundziene, & Turauskas, 2009; Kesner & Dalton, 1994; Zhang & Rajagopalan, 2004), capabilities and culture (Cao, Maruping & Takeuchi, 2006; Valentine, 2011), and employee stability and morale (Friedman & Saul, 1991). Beatty & Zajac (1987) looked at both the market and the managerial impacts of transition, correlating CEO transition effects with a reduction of the stock market value of an organization and shifts in organizational production and investment strategies. According to Friedman and Saul (1991) and Kesner and Dalton (1994), leadership transition, particularly transition involving an outsider CEO, can lead to increased turnover and staff disruption. Bridges (1988) observed that changes in leadership necessarily end relationships and plans of the organization, changing the power, status, and felt competencies of members, therefore members experience grief that impacts the life of the organization going forward. Other effects may include changes in organizational structure and culture, as in Wiersema's (1995) study showing the link between leadership transition and increased restructuring activity in response to a changing organizational environment.

Reports from the world of business consulting suggest a few trends about leadership transition. Booz and Co., organizational consultants, reported in 2003 between 1995 and 2001,

the transition landscape changed dramatically, from 72% of CEOs retiring or dying in office in 1995 to only 47% making unforced transitions in 2001 (Lucier, Schuyt & Spiegel, 2003). In 2002 and 2004 the forced turnover of CEOs because of performance was the primary reason for leadership transition (Lucier, Schuyt, & Tse, 2005). FTI Consulting echoed their observation, although noting unplanned transitions are slightly less common in the biggest companies, between 2007 and 2010, a third of companies with a market value over \$10 billion experienced a CEO transition with 43% of those transitions unplanned (Saunders, 2011). From 2010 to 2011, CEO turnover increased from 11.6% to 14.2% in top companies, with the highest turnover in those companies with the highest market value (Favaro, Karlsson & Neilson, 2012). From 2008 to 2011, 19% to 35% of transitions were forced, with forced transitions being greater for outsider CEOs (Favaro, Karlsson & Neilson, 2012). On the other end of the transition, Booz and Co. consultants noted poor executive hires, largely attributed to board negligence or dysfunction, often have short tenures and poor performance (Lucier, Schuyt, & Tse, 2005).

Studies vary on whether value and performance are impacted by leadership transition. In a survey of 235 organizations, Friedman and Singh (1989) found succession can be disruptive to a company's value, but depending on the context, can be inconsequential or lead to adaptation by the organization. FTI Consulting supported these findings in their observation investor perceptions of the CEO play a large part in investment decisions suggesting CEO transitions can affect market value (Saunders, 2011). Yet Friedman and Singh (1989) asserted succession effects on market value depend on pre-succession performance and the disruptive nature of the transition. A market research study by Kesner and Dalton (1994) showed no correlation at all between managerial turnover and performance. Kesner and Sebor (1994) similarly found, in a review of succession literature, no definitive conclusions about the consequences of leadership

transition. Additionally, Cao et al. (2006) observed the literature on succession in the business context shows no definitive conclusions about the results of leadership transition. They suggest leadership transitions can influence organizational capabilities, positively if the incoming leader has capacities the organization needs and if the board and stakeholders grasp the opportunity to reflect on future directions and select a leader accordingly, and negatively if the transition reflects a loss of overall capacities of the organization (Cao et al., 2006). Unplanned transitions resulting from poor performance correlated with lower shareholder returns, thus directly impacting market performance (Lucier, Schuyt & Spiegel, 2003). Hints of succession effects can be found in some newer literature, such as a survey of 57 Lithuanian companies revealing successors with higher levels of education and relational skills may correlate, if weakly, with increased performance of those organizations (Buoziute-Rafanaviciene, Pundziene, & Turauskas, 2009).

One area of leadership transitions in business studied repeatedly is the difference between leadership transitions involving an insider becoming the new executive and those involving an outsider coming in to lead. Insider succession can be defined as a current employee of the organization entering the executive position, and outsider succession involves a stranger to the firm. Outsider succession is currently increasing, rising from 10% in 2007 to 22% in 2011 in North American companies (Favaro, Karlsson & Neilson, 2012). Reports of succession effects differ depending on the insider or outsider status of the incoming leader. Beatty and Zajac (1987) discovered, in a market analysis of 209 corporations, leadership changes typically correlate with a loss of stock value, regardless of whether the new leader was an insider or an outsider to the firm. Zhang and Rajagopalan (2004) found, in a study of 204 manufacturing companies, planned successions of insiders led to improved performance, even in the face of industry instability. In

2003, Booz and Co. noted incoming outsider CEOs produce greater extremes in performance, veering from great performance in some organizations to poor performance in others (Lucier, Schuyt & Spiegel, 2003), finding from 2009 to 2011, insiders delivered 9x greater shareholder profits than outsiders (Favaro, Karlsson & Neilson, 2012). Booz and Co. observed that these differences can be cultural (Davidson & Gravestock, 2012). In Australia, succession by outsider CEOs led to increased performance, in contrast with a global trend of insider CEOs leading to better performance (Davidson & Gravestock, 2012), and in Europe, outsider successions are more prevalent than in North America, making up 31% of turnovers (Favaro, Karlsson & Neilson, 2012). There are several reasons for the advantages of insider successors. Shen and Cannella (2002) found any positive effects of outside succession are often offset by the loss of senior executives with the past CEO. Additionally, inside succession retains tacit knowledge about the company potentially unknown to an outside successor (Favaro, Karlsson & Neilson, 2012). Insiders tend to have longer tenures than outside successors (Favaro, Karlsson & Neilson, 2012), thus affecting the company's next leadership transition.

The characteristics and status of the exiting CEO can affect the consequences of leadership transition. Booz and Co. noted outgoing CEOs serving as board chairman can present tension between old and new leadership leading to poor performance (Lucier, Schuyt, & Tse, 2005). Long tenures of outgoing CEOs impact the incoming leader's ability to effect change and short tenures of outgoing CEOs may reflect an environment of disruption which may challenge performance under the new leader (Shen & Cannella, 2002). According to Friedman and Singh (1989), transition could be positive for an organization when prior leaders' tenure was marked by poor performance, but transition could have negative effects if performance had been good in the past.

The data on performance is equivocal, but data on the effect of leadership transitions on employees reveals impacts on morale and turnover. A survey of 235 human resources executives in Fortune 500 firms conducted by Friedman and Saul (1991) revealed unplanned leadership transitions and those involving succession by an outsider correlates with increased disruption, and the latter with increased departure. The length of the preceding leader's tenure was correlated with increased turnover and decreased morale, and board-initiated unplanned transitions correlated with increased morale (Friedman & Saul, 1991).

Negative impacts of leader transition can be ameliorated with attention to the process. Wolfred (2008) even cited the use by some Protestant churches of specially trained interim leaders as a potentially useful tool for business organizations who need to set goals and expectations for a new leader outside of the influence of the previous one. The use of planning and intentionality around succession can help an organization turn a transition into an opportunity for organizational growth (Wolfred, 2008). Wolfred (2008) asserted unplanned departures without an emergency succession plan leave companies susceptible to numerous risks when critical leadership and management functions go unfulfilled. Organizations can have great difficulty letting leaders go, and often leaders themselves are reluctant to completely hand over the reins upon their departure, expecting new leaders to lead exactly as they did (Wolfred, 2008).

The above literature suggests effects of leadership transition can be impacted by the nature of the transition (Cao et al., 2006; Farquhar, 1996; Friedman & Saul, 1991; Friedman & Singh, 1989; Karaevli, 2007), the characteristics of the incoming leader (Friedman & Saul, 1991), the prior performance of the organization (Friedman & Saul, 1991; Karaevli, 2007), the involvement of the board in the transition (Friedman & Saul, 1991), and turnover in other areas of organizational management (Karaevli, 2007). Certain literature counters the influence of the

characteristics of the incoming leader, as in Karaevli's (2007) assertion that other contextual factors play a much greater role than the outsider status of the incoming leader. Kesner and Dalton (1994) provided another counterpoint, finding no significant effect of management turnover on the outcomes of leadership transition.

There is a gap in this body of literature which attends so frequently to market value, performance, and stability: the absence of individual experience. One critique found in the literature calls for a greater attention to the experiences of executives and the interpersonal nature of transition experiences (Gentry, Hurst & Shen, 2006). Another critique from Friedman and Saul (1991) noted the effects of succession on individual organization members has been neglected in the empirical literature. The research on employees and leadership transition tends to consider productivity or stability (Friedman & Saul, 1991). Theories of individuals experiencing personal transitions suggest that adults move through transition phases from the ending of one phase through the neutral zone between phases toward a new beginning, and react to each of these phases using their personal coping resources according to the stage and context of the transition (Schlossberg, 1995; Bridges, 2004). Some scholars acknowledge the anxiety and ambiguity of members during leadership transitions (Gilmore, 1988; Greenblatt, 1983; Pfeffer, 1981), although there is no empirical research on this area currently published. Yet organization members are a key variable in studying leadership transitions. Members of organizations, whether employees or volunteers or other types of stakeholders, make up the organizational environment. Their experiences of leadership transition experiences affect the organization's current and future performance and prospects.

Leadership Transitions in Nonprofit Organizations

Research in nonprofit organizations reveals transition effects similar to those seen in business leadership transitions but highlights issues unique to nonprofit organizations. According to a Casey Foundation study, in 2000, 80% of nonprofit leaders were likely to leave their positions by 2007 (Adams, 2004). In 2002, 10%-12% of nonprofits were experiencing leadership transitions at any given time (Hinden & Hull, 2002). These figures were projected to rise 15% through the following decade (Hinden & Hull, 2002). By 2004, as many as 70% of nonprofit transitions were non-routine (Adams, 2004). These figures are a bit dated at this point, but we can assume leadership transition remains a challenge for nonprofit organizations. Tierney (2006) reported leadership transition, among other factors, has created a severe leadership deficit in the nonprofit world, with transition making up 55% of the positions needing new leaders, although Johnson (2009) asserted this deficit will be moderated by generational changes and other factors. These forecasts make the issue of leadership transitions unavoidable in the nonprofit context.

Leadership transitions directly impact organizational capacity, especially when organizations are smaller or the outgoing leader has had a long tenure (Hinden & Hull, 2002). Nonprofit organizations can take four to eight months to select a new executive (Adams, 2004). Theus (1995) and Farquhar (1991) noted interim periods and leaders can have an inevitable effect on the organization. Nonprofits can incur tens of thousands of dollars for transition expenses, crippling smaller or struggling organizations (Adams, 2004). Hernandez (2001), supporting the findings of Gilmore and Ronchi (1995) in their study of business transitions, noted the charisma of an outgoing leader can complicate leadership transition, with divided stakeholder allegiances playing a role.

Allison (2002), who recorded observations about twenty-eight nonprofit organizations who used consulting services during executive transitions, observed boards unprepared to cope with transition, unaware of the risks of bad transitions, and unable to take advantage of the transition to grow and renew their organization. Boards can be atrophied and minimally functional, particularly after the long tenure of an outgoing leader (Gilmore, 2012). Boards may have to address outgoing leader ambivalence and inability to let go (at times leading to outright interference with new leaders), impulses to choose a new leader without a search, incredibly complex communications needs, tendencies to rush through the transition and failure to delve into deeper problems of the organization (Wolfred, 2005). Hernandez (2001) suggested the charisma of an outgoing leader can impact the process of leadership transition, with stakeholders who have become dependent on a charismatic leader finding their allegiances divided between the organization and the outgoing leader. According to Allison (2002), board shortcomings during a transition can place the organization at risk of lost opportunities or even organizational failure. Sadly, Allison (2002) noted, “failure typically results in a poor choice of a new leader and a fragmented, exhausted group of people” on the board (p. 341).

Nonprofit leadership transitions are unpredictable because of the complexity and diversity of nonprofit organizations (Hinden & Hull, 2002). Hargreaves (2009), writing on school leadership transitions, observed five challenges endangering effective leadership succession: succession is often poorly planned, and organizations are taken by surprise when leaders leave; transitions can be badly managed, with few consistent strategies for exit and entry; succession is often badly timed in light of the life cycle of the leader or the organization; emotional aspects of transitions are rarely considered or addressed; and successions is not seen as a natural part of organizational leadership systems. All of these challenges impact the ability of

the organization to appropriately respond to and manage succession (Hargreaves, 2009).

Leadership transitions in nonprofits are correlated with mission drift, leading to unfocused programs and implementation (Beilenson, 2005).

One of the only empirical studies on the effects of leadership transition on organization members was conducted by Farquhar (1989). Farquhar (1989) documented the chronology, importance, and impact of the event along with employee ideas about the incoming leader. Farquhar's (1989) case study approach included interviews and surveys of employees in three organizations, both business and non-profit, recently experiencing a leadership transition. The study found employees experienced effects of leadership transition in the areas of organizational structure, performance, quality of work life, and performance pressure (Farquhar, 1989). Employees felt loss and anxiety and hope, and managed these feelings through meaning-making strategies including rehearsal of options, observation, testing of the new situation, and adjustment (Farquhar, 1989). When employees could not manage their feelings to curb anxiety and uncertainty, they tended to resist, oppose, withdraw from, or reject the incoming leader.

Farquhar followed up this (1989) study with another study (Farquhar, 1991) regarding organization member experiences of a leadership search. Farquhar (1991) interviewed employees of legal aid agencies about their experiences during a leadership transition. She found slightly over half the members reported negative organizational effects such as factionalism, confusion, anxiety, and lowered productivity (Farquhar, 1991). The remaining members reported positive experiences which included involvement and unity (Farquhar, 1991). This study provides additional evidence that the experiences of organizational members during leadership transition are significant, complicated, and worthy of further study.

Intentional work around transitions can ease these risks (Hinden & Hull, 2002). Intentional succession processes are rare in the nonprofit world (Adams, 2004). Balan (2005) used member checks and focus groups as part of a research project with professional women experiencing organizational change, to facilitate their giving voice to and finding reciprocity for their experiences. According to Beilenson (2005), an intentional transition intervention by an outside organization helped a community action nonprofit recommit to their goals, select a new leader, and experience a successful transition into new leadership.

Wolfred (2008) in his consulting report for leadership transitions noted nonprofit agencies might benefit from specially trained interim leaders, such as those used in some religious bodies, to reduce the risk of rejecting a new leader after a difficult exit by a previous executive. One nonprofit consulting firm reports all but one of their clients identified greater organizational health post-transition, and over a third of clients identified new capacity in programming or populations and clients served (Hinden & Hull, 2002). Another consulting firm reported all clients who received transition services to hire a new executive had retained their new executive for at least one year and 11 of 15 clients identified greater organizational health post-transition (Hinden & Hull, 2002). These findings suggest intentional transition work can be helpful, but as they are primarily generated by consulting firms, may need to be supported with other empirical studies.

Leadership Transitions in Congregations

Leadership transitions in congregations can be fraught with as many potential pitfalls as those in the business and nonprofit worlds. Although less concerned with business variables as market value, congregations share many similarities with nonprofit organizations in their leadership by boards and their dependence on supporters and non-employee stakeholders.

Threats to a successful transition include an ill-equipped board, a dysfunctional search process, and a prior leader with difficulty letting go. In one particularly large congregation, The Roman Catholic Church, during this most recent papal transition -- a rare occasion where a still capable Pope has stepped down, the outgoing Pope Benedict XVI publicly pledged his obedience to the new pope, perhaps to avoid a traumatic transition (McCambridge, 2013).

Congregations are affected by the leadership transitions they experience and by how those leadership transitions take place. One factor in the success or failure of a congregational leadership transition is the way in which the outgoing leader has exited (Lohnes, 2008). Just as insider successions show some advantages in the business world, relay successions, those where the incoming leader is employed by and engaged during the tenure of the outgoing leader and the outgoing leader is at times retained by the organization in another role, are asserted by some to contribute to stability in congregations (Detter, 2011; Wheeler, 2008). This likely must be tempered by the risks of a continually involved former leader noted in the research on nonprofit transitions outlined above. Another factor of leadership transition in congregations is the increase of conflict and ambiguity, and congregations may desire to minimize conflict or may choose to harness it as an opportunity for growth (Wheeler, 2008). Wheeler's (2008) study of succession in megachurches revealed the difficulty some older or longer-term members had with accepting leadership transition, with some talking of departing and even leaving the congregation in response to the new leader's installation.

A congregational leadership transition can impact the congregation by bringing individuals in a congregation face to face with different experiences, roles, and theology (English, 1999a; Kratz, 2008). Learning is one element of the changes individuals experience during congregational transitions. English (1999a) found, in her study of four Roman Catholic

parishes undergoing a transition from being served by ordained male priests to being served by female lay pastors, parishioners experienced informal and incidental learning about leadership, the roles of pastors and laity, and sacramental practice. She describes this learning as “changes in practical theological beliefs” resulting from complex factors and potentially occurring in stages (English, 1999a, p. 392). Similarly, Kratz (2008) explored how the presence of a new pastor in a congregation provides opportunities for learning when the new pastor brings prior experiences into conversation with the life ways of the congregation and they develop new ways of being together. Loyd (2009) observed congregations must invent new behaviors and attitudes to cope effectively with congregational leadership transition, and are best equipped to do so through effective leadership and theological reflection. He noted the influence of church culture, and the impact of or need for changes in church culture, on the congregants' experiences of leadership transition.

Although succession plans and processes in churches and denominations are diverse and inconsistent, when present at all (Arant, 2010; Elyse, 2005), certain processes and methods can aid in this transitional learning, such as narrative work (Wright, 2009) and intentional transition work in the congregation during the time between pastors (McClory, 1998). Wright (2009) successfully utilized narrative tools during a period of interim ministry between settled pastors. She used a sermon series, creation of quilt banners commemorating the history of the church, and an Appreciative Inquiry Process to move the congregation from accepting their past and present into committing to a new vision for their future with a new pastor (Wright, 2009). McClory (1998) described a technique used in Catholic parishes using a parish transition team and workshops for outgoing pastors, transition teams, and staff to promote reflection and adjustment on the parish's characteristics and hopes for the future. The transition team facilitates

a brief period between old and new pastors and continues workshops with the new pastor and parish staff to ease and evaluate the transition as it occurs (McClory, 1998). Loyd (2009) noted the necessity of ensuring all voices of congregants are heard in pastoral selection and transition.

A call for narrative work as an aid in organizational transition is paralleled in the literature from other fields. In Tyler's (2005) work on organizational change in a college, she observed a group of managers coping with change used a spontaneously arising metaphor to analyze their college's and their own actions during the change, allowing them to make sense of their experiences. Tyler (2005) and Balan's (2005) work reinforces how metaphor work and sharing stories can help with learning and meaning-making during organizational change.

A summary of the research on leadership transitions in all three contexts is presented in Table 2, below.

Table 2

Research on Leadership Transitions

Author	Year	Context	Population	Sample	Methodology	Conclusions
English	1999	Pastoral Transition	Roman Catholic parishes	4	Observation, Interview	Informal and incidental learning about pastoral leadership, sacramental theology, the church, and their feelings about it, occurred among members during a leadership transition, with varying levels of articulation.
Kratz	2008	Pastoral Transition	Pastor	1	Autoethnography	A new pastor brings in previous experiences into conversation with the congregation's patterns of life, and can help a congregation see itself in new ways.
Loyd	2009	Pastoral Transition	Congregations	2	Case Study	Theology and leadership structures shape the process and impact of pastoral leadership transition.
Uhl	2010	Pastoral Transition	Congregations	62	Quantitative	Pastor turnover affects congregational performance.
Wright	2009	Pastoral Transition	Congregation	1	Narrative Action Research	Narrative tools help congregations develop new ways of seeing, hearing, thinking, and speaking about themselves.
Adams	2004	NPO	Nonprofit Leaders	130	Survey	80% of nonprofit leaders planned to leave within 3 years.
Allison	2002	NPO	Nonprofit Organizations	28	Observation	Boards are often unprepared to cope with transition, unaware of the risks of bad transitions, and unable to take advantage of the transition to grow and renew their organization.
Beilenson	2005	NPO	Community Organization	1	Organizational Assessment	Leader transition led to mission drift. Intentional transition intervention helped reorient the organization after the transition.
Farquhar	1989, 1991	NPO	Organizations	43	Interviews	Slightly over half the organization members reported negative organizational effects such as factionalism, confusion, anxiety, and lowered productivity, others reported positive experiences which included involvement and unity
Ahearne, Lam, Mathieu, Bolander	2010	Business Organizations	Salespersons	400	Surveys	Salesperson performance responds to transition with initial decline, gradual recovery, and eventual restabilization, the trajectory of which is positively affected by learning orientation
Balan	2005	Business Organizations	Female Professionals	5	Interview Focus Group	Giving those affected by transition a voice offers opportunities to learn from one another.
Beatty, Zajac	1987	Business Organizations	Corporations	209	Market Analysis	CEO change announcements typically result in a reduction in firm value. CEO succession influences future production and investment decisions.
Friedman, Saul	1991	Business Organizations	Human Resource Executives	235	Survey	Member impact of CEO succession is dependent on successor context, with outsider succession leading to greater departure and succession brought on by poor performance of previous CEO improving morale.
Friedman, Singh	1989	Business Organizations	Organizations	235	Survey	Succession can be adaptive, disruptive, or inconsequential, depending on the context of transition.
Karaevli	2007	Business Organizations	Corporations	90	Market Research	Outsider CEO succession has no member impact that can be shown outside of other contextual considerations of performance and larger organizational change.
Kesner, Dalton	1994	Business Organizations	Corporations	84	Market Research	Managerial turnover among members does not predict post-succession performance of an organization.

Gaps in the Literature

This review of the literature demonstrates that much is known about informal and incidental learning and leadership transitions in business, nonprofit, and congregational contexts, but there is little empirical research on the informal and incidental learning experiences of individuals who find themselves in the midst of a leadership transition in the organizations of which they are a part. Scholarly discourse points to the need for and effectiveness of supporting informal learning, since when informal learning is undetected it is often unsupported. Leadership transition is addressed in literature regarding business, nonprofit, and congregational contexts. Studies on the effects of leadership transitions on organizations have examined costs, market value, and organizational stability, yet there have been few studies on the experiences of individual members and stakeholders of those organizations. Only one study can be said to address member impacts in business organizations (Farquhar, 1989; 1991), and those scholars who have focused on lead pastor transitions in congregations have had limited scopes and collected no data from individual congregants (Kratz, 2008; McClory, 1998; Wright, 2009; Wheeler, 2008). Although much research is supportive of the idea informal learning occurs during leadership transition, none of the literature has brought to light the specific experiences of individuals within the transitioning organization.

English's (1999a) work in congregations experiencing a change from male priests to female lay celebrants examined learning during one type of leadership transition in congregations, but did not look at either the transition of head pastors or the specific period when a congregation is in the period between pastors. Several studies focused on the experiences of a pastor or interim pastor during a transition (Kratz, 2008; Wright, 2009). Loyd (2009) claims an inclusion of congregation members in his study on congregational leadership transitions,

although the theological lens of his study and his lack of attention to individual congregants (their interview responses are unmentioned in the findings section) shed no light on the experiences of individual congregants during learning transitions.

The study closest to examining individual experiences of congregational leadership transition was conducted by Wheeler (2008) on succession in megachurches. Wheeler (2008) interviewed five lay leaders in three megachurches experiencing congregational leadership transition, although her interviews and findings focused on the members' impressions of the succession and how it went, rather than their internal experiences living through the leadership transition. Wheeler (2008) does call for future research utilizing longitudinal studies during leadership transitions, as her study took place after a transition had taken place and required participants to recollect the transition.

Implications and Significance

The implication of this gap in the literature for this study is that the learning of individuals during leadership transitions in congregations remains unstudied. To add to the body of knowledge around informal and incidental learning and leadership transitions, this multiple case study examined the informal and incidental learning experiences of individual congregants and the congregation as a whole in three dissimilar congregations during a leadership transition.

The questions that guided this study are:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?

3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

To conduct this study, I collected data through observations, documents, and individual interviews, which were analyzed for signs of informal and incidental learning, and studied to determine the influence, if any, of organizational characteristics such as congregational structure, demographics, and stated theology, on learning. I also examined whether the congregation as a whole can be said to experience learning during this period, utilizing the organizational learning theories outlined in this literature review. This study provides new insight into what informal and incidental learning can be said to take place during the congregational leadership transitions under examination, whether the characteristics of those congregations might play a role in learning, and whether the congregation as a whole can be said to have been learning during the transition. This study contributes to the body of knowledge around informal and incidental learning, organizational learning, and leadership transitions.

Chapter Summary

Informal and incidental learning occur in communities, organizations, and congregations. Learning occurs informally through adults' experiences, especially new and transitional experiences. Leadership transitions in business, nonprofit, and religious organizations can affect market value and organizational stability. Few studies examine member effects of organizational leadership transitions and those including member effects were limited by scope, methodology, or sample size. This study examined informal and incidental learning during congregational leadership transitions in congregations using a multiple case study methodology, which is outlined in the following chapter.

CHAPTER 3

METHODOLOGY

There is little existing data on the learning experiences of congregants and congregations during pastoral leadership transitions. The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition, during the period between the exit of a lead pastor and the arrival of a successor. The questions that guided this study are:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations, and probed the influence of organizational characteristics on learning.

This section describes my choice of methodology and the reasoning behind those methodological choices, and highlights how I addressed issues of quality and rigor. To explore these questions, I utilized a multiple case study of three congregations experiencing a

pastoral leadership transition. This study examined three cases of congregations in leadership transition using interviews, observations, and document analysis. Using three cases provided a mechanism for exploring the role congregational characteristics such as structure, demographics, and stated theology play in the informal learning of congregants during congregational leadership transitions.

Research Design

All research begins with design. “Research is a systematic process” (Merriam & Simpson, 2000, p. 2), and the design of such a system necessarily depends on the theory driving the research (Yin, 2009). The theoretical framework for this study combined theories and models of experiential and informal learning in community with the current body of knowledge on leadership transitions. Informal learning theory claims learning occurs throughout people’s experiences in communities and organizations, much of it informal and/or incidental (Bolt, 2008; Dewey, 1938/1997; English, 2000; Marsick, Volpe, & Watkins, 1999; Marsick & Watkins, 2001; Vygotskii, 1978). Models of learning in community focus on the elements of learning seen in communal contexts (Argyris & Schon, 1996; Doornbos, Simoons, & Denessen, 2008; Fenwick, 2000; Findsen, 2006; Foley, 1993; Kilpatrick, 2002; Lange, 2007; Lewis, 2009; Lave & Wenger, 1991; Lave & Wenger, 1998; Sandlin & Bey, 2006; Vygotskii, 1978; Wenger, McDermott, & Snyder, 2002). Research on leadership transition describes the potential for disorientation and change present during transitions (English, 1999a; Ahearne, Lam, Mathieu, & Bolander, 2010; Beatty & Zajac, 1987; Cao, Maruping, & Takeuchi, 2006; Friedman & Saul, 1991; Friedman & Singh, 1989). The intersection of these theories, models, and findings guided this study, directed the research questions and design, and shaped the analysis of research data.

Qualitative Research

Creswell (1998) notes epistemology should be a key factor in determining whether research should be quantitative, qualitative, or mixed-methods. The decision to study congregational research transitions through qualitative methodology was derived from a constructivist (sometimes labeled constructionist) focus on how individuals understand their world, as opposed to a positivist or objectivist focus on determining facts (Crotty, 1998). This study of how congregants experience leadership transitions was an effort to construct an understanding of informal learning out of the participants' understanding of their experiences, the way their congregations have documented those experiences, and observations in the context (Stake, 1995). As Crotty (1998) notes, constructivism counters the idea that a single interpretation can be labeled as objective or true. In the constructivist spirit, I sought not to determine the facts of what occurred during these transitions but how the congregants experienced a pastoral transition and how, during pastoral transition, congregants experienced learning and change. Therefore, qualitative research, grounded in how knowledge is constructed from individual experience (Merriam, 1998) was the most appropriate avenue for this research. Additionally, this study sought to understand the complex experience of learning occurring during the process of leadership transition within a congregational context. Qualitative research is appropriate for research aimed at understanding complex situations (Stake, 1995) and examining contexts and processes (Maxwell, 2005). For these reasons, this study was grounded in a qualitative methodology.

Why Case Study?

Within the qualitative umbrella, I decided to utilize a multiple case study of three congregations experiencing a congregational leadership transition. The use of case study in

studies related to or similar to this study supported the appropriateness of this methodological choice. According to Sawchuk (2008) and Eraut (2004), informal learning in work contexts is sometimes examined using case studies, although interviews are the most common type of research in this area. Case studies have been used to study learning in congregations, as in Lange's (2007) case study on congregational travel seminars, Powell's (2007) ethnographic case study of a college leadership organization, and Fleischer's (2006) case study of a graduate theological education program. This indicated the suitability of case study to the context of this study. Studies examining informal learning in relationship to spirituality and spiritual contexts (Crain & Seymour, 1997; Davis, 2007) often combine methods to gain a rich picture of their subject matter.

Additionally, informal learning can be difficult to identify through research depending solely on participant interviews or surveys since learners may not be conscious of or able to articulate informal learning (English, 1999b). Individuals hesitate to label activities as learning, complicating attempts to measure rates of and participation in informal learning (Gorard, Fevre, & Rees, 1999). I chose a case study methodology incorporating multiple data sources due to its potential to highlight informal learning even when research participants are not able to identify or articulate it. However, I found in participants a great deal of awareness of learning both incidentally and informally, so document and observation data were primarily used to add to the descriptions of cases and provide examples of sources of learning referenced by participants.

This study explored the impact of congregational characteristics on informal learning. Case study is suited to exploring complex contexts and incorporating multiple data sources (Yin, 2009). The use of multiple cases allowed me to identify aspects of informal learning during congregational transitions impacted by congregational characteristics, as well as identifying

those aspects of informal learning not limited to only one unique congregational context. Seeing the strengths of case study for this type of study, and its repeated use in similar studies, increased confidence in the choice of case study for this research.

Defining Case Study

The definition of case study varies among scholars but there are some common elements found among those definitions (Simons, 2009). Case study sometimes refers to using cases as a teaching device, but I am using the term to refer to a qualitative research methodology (Simons, 2009). A case study differs from an experiment or a survey, and can include more than one methodology (Simons, 2009). Stake defines case study as “the study of the particularity and complexity of a single case” (Stake, 1995). In other words, case studies are in-depth, detailed examinations of single entities such as projects, policies, institutions, programs, systems, or organizations, in the context in which they exist, using various methods and evidence, either alone or, in multiple case studies, alongside other cases (Bogdan & Biklen, 2006; Simons, 2009). These characteristics allow case study research to explore contemporary events in complex real-life contexts using multiple data sources (Yin, 2009).

Strengths of case study research. According to Eisenhardt (1989), case studies are useful for the beginning stages of research on a topic or context. Case studies can answer *how* or *why* questions, particularly about contemporary contexts the researcher can't control (Yin, 2009). With the primary aim of understanding (Simons, 2009), case studies are suited to studying processes little understood, providing a holistic view of many aspects of the process and their relation to each other and the context (Meyer, 2001). In case studies, preexisting theory can be used for design and analysis, unlike in grounded theory and ethnography, where theory arises from the data (Meyer, 2001).

Case study is useful when a phenomenon is difficult to separate from its real life context (Yin, 2009). Simons (2009) similarly notes “qualitative case study values multiple perspectives of stakeholders and participants, observation in naturally occurring circumstances, and interpretation in context” (p. 4). Simons (2009) observes further strengths of case study methodology include the ability to explore change through documenting and interpreting the process and dynamics inherent in events as they occur; through flexibility in time, methods, and reporting strategies; and through accessibility to readers through vivid and descriptive language.

In organizational studies, case study can be particularly useful. Hartley (2004), asserts organizational phenomena are well served by the holistic perspective of case studies. Further supporting this assertion is the frequency with which case studies are used for research comparing organizations in systemic ways (Rowley, 2002). For all these reasons, case study seemed the best fit for this study of organizations in process.

Limitations of case study research. Case study methodology is limited by several factors. Case studies often produce large amounts of data can be overwhelming and difficult to report (Simons, 2009). Researchers can skew their studies and findings because of bias regarding what they expect to find (Simons, 2009). Case study is unsuited to broad generalization, but can be used to make what Stake (1995) refers to as “petite generalizations” about one or a few cases. Stake (1995) cautions researchers should avoid jumping too quickly to assertion, being careful to preserve the multiple realities within the findings. Particularly in multiple case studies, it is important to allow the patterns in each case to emerge individually before drawing conclusions across cases (Meyer, 2001). Finally, although case studies are intended for situations where the researcher does not intervene, the study itself can function as an intervention and change the context accordingly (Simons, 2009). By acknowledging and addressing these limitations, the

researcher can convey vivid depictions of reality, spotlighting issues of time, data volume and limited generalization, in order to produce quality research (Simons, 2009). Because I primarily studied one congregation at a time, I was able to let each case speak for itself before identifying patterns between and across cases. I fully acknowledge the fact that by simply asking questions about learning, I may have surfaced awareness of informal and incidental learning in participants that might otherwise have gone undetected by them, and I discuss this further in Chapter 6.

Compatibility with this study. In selecting case study for this research, I found Yin's (2009) observation that case study approaches cope easily with situations involving multiple variables and sources of evidence quite encouraging. Researching learning during congregational leadership transitions required engaging with the many and varied aspects of life in a congregation. Just as life in any organization consists of many opportunities for engagement with other people, environmental factors, new information, and changing circumstances, life in a congregation consists of all of the above with the addition of spiritual experiences and factors. This unique confluence of factors in the congregations I studied required consideration of all the possible causes and influences on learning participants may have experienced. Simply examining the particularity of the leadership transition will not work. I needed to understand the environment of the congregation, the interactions participants experienced, and how both the environment and the interactions were impacted by the leadership transition. This diversity of considerations required me to ensure sources of evidence and the data I collect aided in informing all of the above.

Conducting the Case Study

According to Meyer (2001), there are few guidelines for conducting case studies. Designing a case study, like selecting case study as a methodology, starts with research questions

(Simons, 2009). In seeking to understand what informal learning and incidental learning occur in congregants and congregations as they experience leadership transition, and what role organizational characteristics play in informal and incidental learning, I selected methods and procedures suitable for those goals. Interviewing, observation, and document analysis are methods facilitating understanding (Simons, 2009). Using all three of these methods allowed this study to explore participant perceptions of informal and incidental learning and consider contextual influences on that learning. Other methods were considered, such as focus groups and participant generated artistic depictions, but a desire to make participants comfortable with taking part in research led me to select methods most familiar and the least intrusive for participants and their congregations.

Selecting and Recruiting Cases

A key decision in constructing case study research is selecting the case under study (Simons, 2009; Yin, 2009). This study is best categorized as an instrumental case study (Stake, 1995), in which a case is examined to answer a research question broader than merely understanding the unique incidence of the case. The focus, rather than on learning the unique facts of a pastoral transition, was on what informal learning was occurring during that transition, and across several transitions. Case studies select cases best suited for exploring the question or central concern (Meyer, 2001; Simons, 2009). Yin (2009) likewise observed selection of a case for study should derive directly from a study's research questions. A researcher may select, rather than a 'typical' case, a case which best maximizes what the researcher seeks to learn (Stake, 1995). Therefore, to study congregational leadership transitions, all of the cases were congregations undergoing a leadership transition. Yin (2009) recommends the use of multiple cases for novice researchers to improve research quality. To study whether congregational

characteristics differentiate informal learning in a congregation undergoing leadership transition, it made sense to study three congregations with differing characteristics.

Cases must be accessible to the researcher within available resources of time and funding (Rowley, 2002). I focused on Christian congregations so I could utilize my network of seminary classmates and fellow ministers for ease of identification of appropriate congregations and access to them once selected. I selected congregations that were geographically accessible to me for interviewing and observations. The farthest congregation was just over an hour away from my home, making it easy to visit frequently for observations and schedule interviews at participants' convenience.

Cases must be bounded and defined enough to determine the unit of analysis, or where the case begins and ends (Simons, 2009; Yin, 2009). These boundaries include physical location, temporal location, and individuals involved (Simons, 2009). The research questions specify I will be researching the cases of congregations experiencing a leadership transition. Relying on participant recollections long after the fact could have been problematic because of the tendency of informal learning to be unconscious or unacknowledged on the part of learners. Researching a congregation after the transition has concluded would have reduced the ability to use observation to explore the congregational context. I selected congregations whose transition had begun but was not yet completed, to capture learning during the leadership transition.

This study explored learning during leadership transitions in three dissimilar congregations to explore whether informal learning occurs differently in varying congregational contexts. The ability to compare the experiences of three different congregations allowed me to discover any commonalities of informal learning across those distinct contexts and detect contextual influences on learning. To achieve the goal of differing congregations, I studied three

congregations differing in terms of location (rural/urban/suburban), size, and theology. The congregations were predominantly white and none could be described as having a conservative theology, a limitation that was likely due to using my networks, as a white woman pastor, to identify cases. One case did differ significantly from the other two in its identifying as a predominantly GLBTQ congregation.

Other considerations in choosing a particular congregation to study included structure, or how the congregational staff is ordered, polity, or how the congregation chooses and employs pastors, and involvement, or how involved members and leaders have been in the pastoral transition process. To maximize the potential for identifying learning occurring during disorientation or change, I selected only those congregations who were experiencing a leadership transition involving their lead or head pastor, as these transitions are likely to be the most disorienting for congregants. The congregations I selected for research were all organized through a congregational polity that selects and employs its own pastors, those types of congregations being maximally affected by the process of transition. A congregation whose pastors are selected for them by a governing body will not necessarily experience the transition as unexpected or non-routine and will not likely have the same experience of involvement in the transition. The congregations I studied all had high member and lay leader involvement in hiring processes and decisions, characteristics ensuring participants were sufficiently engaged with the process for it to be a significant experience for them.

To find cases meeting these criteria, I first talked to my network of seminary classmates and fellow ministers in the Metro Atlanta area. I then began looking through denominational publications online. I found the first church through an article in a denominational publication,

the second church through a pastor I met at an event for pastors, and the third church through a former coworker who was on staff there.

Gaining Access

To gain access to the selected congregations, I began by emailing the congregational lay leaders and staff, including the interim minister, if present, to introduce myself and the study. I outlined what will be required of a participating congregation, including potential risks to the congregation and its members. I then asked for the study to be introduced to the congregation's governing body so they might vote on whether their congregation will participate in the study. In one of the congregations, I had lunch with the pastor and a lay leader who became the main contact there. In another, I only had to correspond by email to have the study approved. In the third, I presented to the congregation at a meeting after worship about the study, followed by a question and answer session, followed by their vote to approve the study. After approval, I provided letters and other press ready announcements the congregation could use to introduce the study to the larger congregation, as required by the IRB, and because communications can aid with gaining access to individuals within an organization (Stake, 1995).

This study was conducted according to IRB guidelines and under IRB review (Study #00000522) to ensure no harm came to the participants as a result of this research. Initial contact with interview participants introduced the purpose of this study and the potential harm inherent in their participation, identified as possible mental and emotional distress when considering and processing questions about their spiritual lives. I worked to ensure that my presence was introduced at congregational meetings and events in such a way to make it clear that participation and inclusion in research is voluntary. All communications reinforced that the name of the congregation and any of its members, along with any details might easily identify the

congregation or member to readers, would be changed in all publications I generate from the study to assure participants of their anonymity (Stake, 1995). I obtained individual Waivers of Informed Consent for any individuals who participate in interviews.

As the church events I observed were open to the public, I did not need the permission of individual participants, but rather the congregation as a whole, for data collection. However, the IRB asked that a notice of my presence be publicly shared in these congregations through physical posting on a bulletin board and inclusion in printed worship materials. The documents I examined were public, such as minutes, newsletters, and bulletins, with a few additional documents shared with me by interview participants that they had previously made available to the congregation.

The intention was to spend a period of around 6 months with each congregation, during the period between the departure of their former pastor and the arrival of a new pastor. This was formally bounded by obtaining consent from the congregations, with each consent covering a period of six months. In each congregation, I soon realized that six months might not be enough time to conclude data collection, particularly the interviews. In each congregation, I asked for and was granted an extended congregational consent to allow time to conclude those activities. At Smalltown, I was with them for seven months, March 2014 until October 2014, which extended my presence into the period after they hired a new pastor, although I concluded observations with the installation service of their new pastor. I used the months following to conclude my interviews. At Suburban, the period of study was twelve months, September 2014 until September 2015, at which time they still had not hired a new pastor. At Urban, the period of study was seven months, from February 2015 to September 2015, by which time they had

decided to forgo a search and hire an existing staff as transitional minister as well as moving toward a merger with another congregation.

Selecting and Recruiting Individual Participants

As in selecting cases, selecting participants was guided by the research questions and aims. Purposeful sampling, or selecting data sources likely to be most relevant to the research questions, is frequently used in case studies (Bogdan & Biklen, 2006). Accordingly, when recruiting participants for my interviews within the sample congregations, I first identified the lay leaders and most active members of the congregation through interviews with the congregational leadership team. I targeted certain congregational members who were involved with congregational meetings and/or decision making around the transition in hopes of gaining their participation, identifying them through leader reports and relevant documents. Voluntary participation and snowball sampling, or participants referring other participants, were additional sources of participants (Creswell, 1998). I had hoped for 10-15 participants per congregation willing to take part in interviews to provide enough data for the study but ended up with only 15 participants in total. This kept transcription and analysis demands at a reasonable level. Choosing people in key roles and with high levels of involvement allowed me to learn the most about the experience of leadership transition from those most involved in and affected by it. Broadening the scope to those who volunteer and those are recommended by others diversified the participant field and allow a glimpse into the experiences of those at different levels of involvement. All the participants had been present at congregational activities on a frequent basis (at least every two weeks) during the congregational leadership transition in order to have enough experiences during the transition that will be relevant to the research questions. The sampling technique provided a somewhat diverse group of participants in terms of gender, age,

sexual orientation, and congregational involvement. However, I did note that the sample included only one or two people who would not be considered highly involved or who did not serve in some form of lay leadership in the congregation. One participant, Frank, provided no stories of learning, but did provide some comments that were used to fill in details about the congregation.

I had participants complete a demographic survey either written or by asking them the questions and taking notes on their responses, depending on their preference. The demographics of the participants are presented in Table 3 below. I have not included the categories of marital status and income level to avoid risks to confidentiality.

Table 3

Research participants

Pseudonym	Gender	Age	Ethnic Identity	Congregation
Ted	Male	60s	White, non-Hispanic	Smalltown
Jack	Male	60s	White, non-Hispanic	Smalltown
Valerie	Female	20s	White, non-Hispanic	Smalltown
Christine	Female	80s	White, non-Hispanic	Smalltown
Jerry	Male	60s	African American	Suburban
Jim	Male	70s	White, non-Hispanic	Suburban
Gregory	Male	70s	White, non-Hispanic	Suburban
Alan	Male	80s	White, non-Hispanic	Suburban
Sue	Female	Elder	White, non-Hispanic	Suburban
Frank	Male	Did not report	White, non-Hispanic	Urban
Mark	Male	30s	African American	Urban
Gail	Female	20s	African American	Urban
Wendy	Female	20s	Asian American	Urban
Allyson	Female	30s	White, non-Hispanic	Urban
Sarah	Female	70s	White, non-Hispanic	Urban

I continuously reviewed the characteristics of the participants in hopes of ensuring a diverse spread of participants, which I believe I achieved somewhat. The interviewees included

eight men and seven women, and ranged in age from their 20s into their 80s. I had less diversity than I would have liked in two areas. Because the congregations were predominantly white, the participants were as well. In reviewing the data, though, I do see that men over 60 were prominent among the participants, making up over a third of the participants. This could reflect the fact that the majority of congregational lay leaders are older men in two out of the three congregations I studied.

Data Collection

Thoughtful research design means data collection procedures and instruments relate strongly to the research questions (Yin, 2009). As stated above, the selection of interviewing, observation, and document analysis was driven by the potential of these methods to increase understanding, to create the least disturbance in the context studied, and to provide relevant information on informal learning potentially unconscious to or unacknowledged by learners. Fielding (2010) observed that qualitative research remains subject to skepticism over quality, and thus another reason for multiple methods is to ensure findings accurately reflect the situation under study and overcome any researcher bias (Frost et al., 2010). Therefore, I utilized interviews with individuals about their experiences, document analysis of congregational records and communication, and observation of congregational meetings and activities. To do this work, I spent several months of data collection in each congregation. One congregation completed its transition within four months of when I began collecting data, which shortened the time I intended to spend there. The other two congregations were studied for nine and ten months and their transitions were still ongoing at the time I ended the research with them.

Interviewing. Interviewing is ideal for understanding the experiences of participants (Seidman, 2006). The focus of interviewing was on the experiences and changes in knowledge of

participants during the leadership transition period. Yin (2009) notes the research questions should generate questions the researcher is posing to the case itself, in turn generating the specific questions used in protocols and analysis. According to Seidman (2006), using prewritten protocols is useful when the interviewer can articulate the information sought to design questions out of this understanding. Drawing on research questions, I developed interview protocols that avoided leading participants and kept questions open-ended to collect rich and useful responses. While the first protocol designs contained only a few questions and were very open-ended, during the IRB process, this protocol was made more detailed and specific, although the questions were still designed to be open-ended. Open-ended questions allow participants to answer in their own words and provide detailed descriptions or accounts (Roulston, 2010). The protocol was then adjusted slightly after the first interview to increase the potential of capturing stories of learning, and is present here in Figure 2, below.

Thank you so much for agreeing to talk with me today. [explain purpose and give letter, explain consent and sign consent, answer any questions.] To remember what you have told me and avoid spending our time together looking down at my notebook, I'd like to use an audio recorder today. Would that be okay with you?

I'd also like to invite you to complete this form that captures some demographic information that might be useful in our description of your congregation and the people in it. None of the information will be used in a way that would allow others to determine your identity or the identity of this congregation. Would you be willing to fill out this form?

I am trying to learn how people in churches learn during pastoral transitions. I would like to ask you some questions about the characteristics of your church and your experiences here at Church as a part of my research. Shall we begin?

Tell me about XYZ Church? [probe: What are people like? What does your church believe? What would you tell someone you wanted to invite to church?]

What is your role at XYZ Church? [probe: has that changed over time? When and why?]

How did you first get involved with XYZ Church? [probe: What did you think of church at first? Has that changed? Why?]

Tell me about the structure of XYZ Church? [probe: how did you learn about it?]

Tell me about the pastoral transition at XYZ Church? [probe: how did you learn about it?]

Tell me a story about a time during the pastoral transition when you experienced significant learning. I would like to know what happened.

[probes: who were the characters, what had happened to lead up to that, what new knowledge can you trace to that experience, how did it make you feel, why do you think this was significant to you,]

Now think about another time when you experienced significant learning, and tell me that story.

Probes if needed:

Did you learn anything about yourself?

About others?

About the church?

About your relationships with others? [probe: any change?]

What would you share with others in churches undergoing pastoral transition?

Figure 2: Interview Protocol

When responses were lacking sufficient detail, I used follow up questions, or probes, using the participants' own responses, and their own words when possible, to encourage them to elaborate further and avoid making assumptions about what they mean (Roulston, 2010). Clarifying questions were used to ensure accuracy in understanding the participant's intentions. I planned ahead with some probes included in the prewritten protocols so I would have them ready to use when needed. I developed probing questions on the spot to spur further reflection and deeper responses in the participants. Often, though, few probes were needed, with participants answering at length and in great detail after just one of the open ended invitations/questions. Challenging aspects of following the protocol included determining when to use probes and maintaining focus in the interview, which supports the assertions of Demarrais (2003) that using probes and remaining focused can be difficult for interviewers. These challenges often involved moments where my prior experiences with church and assumptions about the church context led me to believe a story was complete, only to find additional details added later in the interview or wonder upon transcription if additional probes could have revealed even more of the story.

To schedule the interviews, I corresponded with the participants by email and phone. Interviews took place in church facilities, participant homes, my home office, restaurants, and coffee shops. I aimed for 60 minutes per interview to allow sufficient time to finish the protocol and explore participants' experiences fully, as 60 minute interviews are long enough for an in depth conversation and fit into participants' busy schedules. In practice, interviews ranged from less than half an hour to almost 2 hours.

I recorded the interviews using a digital audio recorder to transcribe them accurately (Simons, 2009). Although recording devices can be intrusive and promote a lack of concentration on the part of the interviewer, overall they are helpful, since relying on memory can be

problematic when words can be confused or bias can affect perceptions of language and meaning (Simons, 2009). I jotted down notes to remember things I wanted to ask further about, if not fully explained.

It was vital to establish rapport with interview participants (Simons, 2009). To do so, I began our time together with a few minutes of small talk, then explained the research and its aims clearly and expressed openness to any questions the participants might have (Simons, 2009). I used active listening and probing questions indicate I was hearing what participants are saying (Simons, 2009). Clarifying questions were used in hopes that participants felt heard and had the opportunity to express whether they felt their experiences are being captured accurately. I attended to my reflexivity to ensure that rapport and empathy don't compromise investigation or data, although there were times, certainly, where warm feelings toward interviewees and their enjoyment of having a listening ear made it challenging to stay on the interview protocol rather than diverging into a lively conversation about all manner of interesting things. This experience mirrored the observations of DeMarrais (2003) that emotional aspects of interview conversations can be distracting for interviewers. For example, one of the participants began talking at length about his time working in various industries. Another began a lengthy narration of her entire history of activism in the LGBTQ community. I felt conflicted to redirect them when those topics were quite interesting and I was sympathetic to their possible need to tell these stories that, while important to them, were not related to this study. When this happened, I tried to put my emotional response and their conversational diversions on hold through a verbal redirection, and pick them back up after the recording stopped if participants wanted to ask my opinion on things or talk about non-related subjects.

As Roulston (2010) observed, quality must be considered both in the interview interactions and the overall research design. Kvale and Brinkmann (2009) assert the following as indicating quality in an interview: spontaneous, rich, specific and relevant interviewee answers, which are longer than interviewer questions, and followed by interviewer clarification. This high bar can be difficult to achieve. Interviews can suffer from threats such as leading questions (Johnson, 1983) and the unreliability of participant recollections (Gardner, 2001). Participants can be cooperative, motivated and eloquent but can be incoherent and distractable (Kvale & Brinkmann, 2009). I tried to address these threats through good interviewing techniques including focus, conversational skill, language proficiency, and facilitation of narratives through appropriate probes and follow up questions (Kvale & Brinkmann, 2009). I did find my technique challenged at times by rapport with participants and our common ground of being involved with church. When I noticed this feeling, I worked to remember the purpose of the interviews, correct side conversations and bring the interview back to the protocol questions.

Observation. Naturalistic observation is defined by Emerson, Fretz and Shaw (2001) as “establishing a place in some natural setting on a relatively long-term basis to investigate, experience and represent the social life and social processes occur in setting” (p. 353). This type of observation of church worship and other events aided in understanding of any informal and incidental learning occurring during leadership transition. I tried to note changes in language or interactions occurring over time, where participants may not yet be conscious of changes or able to articulate them in interviews. Primarily, observing meetings, events, and worship in the congregations I studied provided a larger picture of each organization and its leadership transition process (Simons, 2009). Observation provided data on norms, values, culture and subculture (Simons, 2009). Information on the actions and roles of the participants was

additionally available through observation, providing a cross-check or triangulation on other sources of data such as interviews and documents (Simons, 2009).

Observations occur on a continuum from non-participant to full participant observations (Simons, 2009). My observations were not full participant observations since I was not a full congregant or member in either of the congregations I studied, and thus did not participate in the meetings or events through speaking or influencing the situation, although during events such as worship or fellowship, I took part as would any visitor. I simply attempted to be a regular presence at most congregational meetings, some congregational worship and fellowship events, and other key occasions in the life of the congregation.

At these meetings and events, I did not record using technology, although most of the worship services and some meetings were recorded by the congregations themselves for public broadcast. I recorded observations in field notes, both during the events when appropriate, and after the fact when concurrent note-taking would be intrusive (Kelly, 2006). Notes taken after an event were completed while the event was still fresh in my mind using a phone voice recorder while driving home or a notebook while sitting in the car still on site (Stake, 1995). Details I compiled in notes included rich descriptions of physical settings and key actors as well as what was said and how. Notes aided efforts in sorting through the many co-occurrences during a single event and capture initial impressions, feelings, or thoughts for either bracketing or follow up at a later date, whichever is appropriate (Merriam, 2009). One challenge encountered in observation was avoiding bias resulting from pre-formed judgments of what was happening, due to working on staff at a church at the time (Simons, 2009). Stake (1995) recommends researchers keep good records, focusing on key events and conditions and delaying interpretation. Thus I tried to see the events with an outsider's eye, letting notes capture enough rich detail that I might reproduce the

event accurately for analysis and reporting my study in compelling and accessible ways. An index of observations is presented in Table 4 below.

Table 4

Observations

Congregation	Date	Event
Smalltown	4/27/2014	Worship
Smalltown	4/27/2014	Meeting
Smalltown	5/29/2014	Field Notes
Smalltown	6/21/2014	Field Notes
Smalltown	6/22/2014	Worship
Smalltown	7/27/2014	Worship
Smalltown	8/14/2014	Worship
Suburban	4/26/2015	Worship
Suburban	4/26/2015	Information Session on Same Gender Marriage
Suburban	5/31/2015	Worship
Suburban	9/20/2015	Worship
Urban	3/22/2015	Recorded Worship
Urban	3/29/2015	Recorded Worship
Urban	5/10/2015	Recorded Worship
Urban	5/17/2015	Worship
Urban	5/24/2015	Recorded Worship
Urban	5/31/2015	Recorded Worship
Urban	6/14/2015	Recorded Worship
Urban	6/21/2015	Recorded Worship
Urban	6/28/2015	Worship
Urban	7/5/2015	Worship
Urban	7/17/2015	Friends Friday
Urban	7/26/2015	Recorded Worship
Urban	8/2/2015	Worship
Urban	8/9/2015	Worship
Urban	8/16/2015	Recorded Worship
Urban	8/23/2015	Worship
Urban	8/30/2015	Worship (attended and have recording)
Urban	9/6/2015	Recorded Worship
Urban	9/13/2015	Worship

Document analysis. Documents are both evidence of and actors in the social process (Prior, 2003). Documents can demonstrate the culture, values, beliefs, and attitudes of an organization or individual (Simons, 2009). Situated within their context, documents are socially produced social products given meaning by their readers rather than containing inherent meaning (Prior, 2003). Naturally occurring documents produced in the course of everyday life are generally regarded as routine and at times invisible by the organization, and at critical points documents can shift into playing a greater role (Prior, 2003). For these reasons, document analysis seemed excellent for illustrating systems in crisis or in the midst of controversy and a crucial component of studying learning during a leadership transition in a congregation.

According to Altheide, Coyle, DeVriese, & Schneider (2008), qualitative document analysis involves “searching for contexts, underlying meanings, patterns, and processes” (p. 128). It is important to determine how documents function, how they are consumed, and how they are used (Prior, 2003). Researchers should pay attention to how documents are used in routine activity and by whom, how documents function in various contexts, and how documents constitute events (Prior, 2003). For this study, examining documents created and consumed during a time of leadership transition highlighted how these documents function, how they are created, their purpose for being created, and what their content contained. Documents can be used to constitute an unexpected event by providing evidence of the event and its dimensions (Prior, 2003), and document data often illuminated the various dimensions of the event itself.

Document analysis, like all case study research, must be guided by research questions (Stake, 1995). To analyze documents, one must first select them. The researcher can select representative evidence through strategies such as random sampling or select only certain documents most relevant to the study (Prior, 2003). For this study, I selected documents most

likely to reference the leadership transition, including meeting minutes of church leaders and search teams, church newsletters, and worship bulletins. I collected any additional documents generated by the congregation during the study period in case there were others meeting these criteria I had not previously included. Physical collection of the documents varied, from online documents collected directly by the researcher, paper documents being either given to the researcher by a church staff, or allowing me to have access to files and pull relevant documents from within them.

Extracting and coding data from documents can be done in many ways including standardized forms, indexes of terms and themes, and organizing the data into codes and categories (Prior, 2003). Documents in organizations act as both receptacles of information and as agents in the life of the congregation (Prior, 2003). To analyze the documents through both of these lenses, I identified the type, source, function in the life of the congregation, and contents of each document. I then sorted the documents according to their relevance to the research questions. I worked to determine the origin and use of all documents, gathering information from church leaders and members as necessary to determine those dynamics. I coded information that simply contributed to the descriptions of the congregations and their characteristics. An index of the documents I collected and examined is presented in Table 5 below.

Table 5

Documents

Congregation	Date of Document	Type of Document
Smalltown	Undated	Ad placed for pastor
Smalltown	Undated	Website
Smalltown	5/20/2013	Email to Congregation
Smalltown	6/12/2013	Email to Congregation
Smalltown	6/26/2013	Email to Congregation
Smalltown	7/3/2013	Email to Congregation
Smalltown	9/5/2013	Email to Congregation
Smalltown	9/16/2013	Email to Congregation
Smalltown	Undated	FBC Smalltown Consensus Survey
Smalltown	9/30/2013	Email to Congregation
Smalltown	March 2014	Budget
Smalltown	March 2014	Hymns
Smalltown	4/27/2014	Worship Bulletin
Smalltown	5/3/2014	Flyer for Pastor's Pot
Smalltown	5/27/2014	Email to Congregation
Smalltown	5/28/2014	Email to Congregation
Smalltown	June 2014	Letter about Mission Trip
Smalltown	6/11/2014	Email to Congregation
Smalltown	6/18/2014	Email to Congregation
Smalltown	6/22/2014	Worship Bulletin
Smalltown	6/23/2014	Email to Congregation
Smalltown	7/3/2014	Email to Congregation
Smalltown	7/25/2014	Email to Congregation
Smalltown	7/27/2014	Worship Bulletin
Smalltown	8/1/2014	Email to Congregation
Smalltown	9/15/2014	Email to Congregation
Smalltown	7/3/2014 and multiple	Email to Congregation
Smalltown	October 2014	Newsletter
Suburban	October 2010	A History of the Suburban Presbyterian Church
Suburban	2014	Group Report: Suburban GA
Suburban	9/27/2013	Facebook Post
Suburban	11/1/2013	Sower
Suburban	11/12/2013	Facebook Post
Suburban	11/27/2013	Letter to Members
Suburban	12/1/2013	Sower
Suburban	1/1/2014	Sower
Suburban	1/13/2014	Minutes of the Session
Suburban	1/22/2014	Church Statistics
Suburban	2/3/2014	Minutes of the Session
Suburban	3/2/2014	Minutes of the Congregation
Suburban	4/14/2014	Minutes of the Session

Table 5

(Continued)

Suburban	5/22/2014	Unsent Letter
Suburban	5/22/2014	Notes from tonight
Suburban	5/22/2014	Minutes of the Session
Suburban	6/15/2014	Minutes of the Session
Suburban	6/19/2014	FAQs -- Same-Gender Marriage
Suburban	7/1/2014	Letter to Session from Interim Pastor
Suburban	8/13/2014	Admin. Council Meeting Minutes
Suburban	8/17/2014	Minutes of the Session
Suburban	November 2014	Devotions for Advent
Suburban	11/20/2014	Small Group Promotional Letter
Suburban	1/18/2015	Minutes of the Session
Suburban	2/25/2015	Letter to Suburban Presbyterian Church Family
Suburban	3/15/2015	Minutes of the Session
Suburban	3/29/2015	Small Group Follow-Up Luncheon Pastor's Talking Points
Suburban	April 2015	Church Directory
Suburban	4/9/2015	Minutes of the Session
Suburban	4/21/2015	Collaborative Ministries email
Suburban	4/30/2015	Announcement about Martha Clay
Suburban	5/17/2015	Session Agenda
Suburban	5/21/2015	To Session; To Congregation
Suburban	5/26/2015	Called Meeting of the Session
Suburban	5/28/2015	Letter to Suburban Presbyterian Church Family
Suburban	6/21/2015	Congregational News
Suburban	7/5/2015	Worship Notes
Suburban	Unknown	Why North Avenue Joined the Fellowship of Presbyterians
Urban	7/13/2014	Minutes of Congregational Meeting
Urban	10/25/2014	Urban UCC Board of Directors Meeting Minutes
Urban	10/30/2014	The Chimes e-Newsletter
Urban	11/2/2014	Urban UCC Board of Directors Meeting Minutes
Urban	11/6/2014	The Chimes e-Newsletter
Urban	11/9/2014	Urban UCC Board of Directors Meeting Minutes
Urban	11/13/2014	The Chimes e-Newsletter
Urban	11/16/2014	Urban UCC Board of Directors Meeting Minutes
Urban	11/20/2014	The Chimes e-Newsletter
Urban	Unknown	Email
Urban	12/15/2014	Urban UCC Board of Directors Meeting Minutes
Urban	1/13/2015	Board of Directors Meeting
Urban	1/15/2015	The Chimes e-Newsletter

Table 5

(Continued)

Urban	1/18/2015	Email
Urban	2/2/2015	Bulletin
Urban	2/12/2015	The Chimes e-Newsletter
Urban	2/19/2015	The Chimes e-Newsletter
Urban	2/23/2015	Urban UCC Board of Directors Meeting Minutes
Urban	3/16/2015	Urban UCC Board of Directors Meeting Minutes
Urban	4/13/2015	Urban UCC Board of Directors Meeting Minutes
Urban	5/3/2015	Bulletin
Urban	5/3/2015	Minutes of Congregational Meeting
Urban	5/17/2015	Bulletin
Urban	5/19/2015	Urban UCC Board of Directors Meeting Minutes
Urban	6/28/2015	Bulletin
Urban	7/5/2015	Bulletin
Urban	7/7/2015	Urban UCC Board of Directors Meeting Minutes
Urban	8/2/2015	Bulletin
Urban	8/9/2015	Bulletin
Urban	8/23/2015	Bulletin
Urban	8/30/2015	Bulletin
Urban	9/17/2015	The Chimes e-Newsletter
Urban	9/24/2015	The Chimes e-Newsletter

Information on congregational characteristics. I collected information on congregational characteristics, wherever possible, to provide rich descriptions of the three cases and examine whether the experiences of learning during leadership transition varied between the three congregations, and what role congregational characteristics played in any variation found. I asked the interview participants, as well as congregation lay leaders and staff, to tell me about their congregation, which often included their opinions on congregational member age, gender, social position, geography, sexual orientation and theological position. One of the congregations had collected this data for their search process, which I was able to access. A prior research study on the same congregation was made available to me. I observed what demographics I saw during

visits. Congregational documents provided some of this data. All of these were used to aid in constructing descriptions of each congregation.

Organizing the Data

Organizing data occurred throughout the research process. Interviews were recorded using audio equipment to preserve the accuracy of the participants' responses until I am able to transcribe them. Observations were recorded through field notes to document observations. To organize data for analysis, I created a system of spreadsheets to categorize and coded the material according to characteristics and themes. Stake (1995) suggests using storage tools, such as electronic or paper file folders organizing the data by sites and individuals. Following this recommendation, I used a password protected drive with automatic backup systems to store and organize all recordings, field notes, transcripts, and analysis spreadsheets. I used a locking filing cabinet to store any necessary hard copies of research materials. The use of password protection and a locking file cabinet ensured confidentiality of the data and participants' identity.

Transcription

Transcription is an important part of interview studies. According to McLellan, MacQueen and Neldig (2003), inaccurate transcription can negatively impact analysis. I used a professional transcription service, and did quality checks by listening to interviews while reading the transcripts. More detailed transcription methods are required for studies intending to analyze conversation, but for my purposes a simple accounting of the stories of participants sufficed (Roulston, 2010).

Analysis

Analysis occurs throughout the process of a study (Stake, 1995). It was important to begin analysis with a particular strategy grounded in the theories and frameworks guiding the

study (Yin, 2009). As the primary lens for this study was constructivism and particularly, how participants constructed their experiences of learning and change as they recalled them and recounted them to me, I used thematic analysis to explore these ideas in the data. Thematic analysis involves applying codes to the data and then categorizing the data according to patterns and themes found in the data (Roulston, 2010). This approach can be labeled a categorical approach to analysis (Stake, 1995). Rather than using predetermined themes, I primarily used an inductive approach, observing patterns in the data before deciding on codes or themes (Roulston, 2010).

First, I identified excerpts in interview data when respondents told a story of learning something or reported an incident of learning. I sorted these stories and incidents from the interview responses according to the research questions with which they most closely correlated. I next conducted a thematic analysis of the responses under each question, pulling out sentences or phrases that I believed best represented their response, and then I summed up that sentence or phrase in a word or phrase which served as a code. I went back to the data and repeated this process twice, to ensure that I felt each excerpt was connected with the code with which it most closely aligned. The codes that emerged seemed to be in two general categories: topics of learning and sources of learning. I decided to use these as organizers for the data.

I compiled the data into a narrative format, working to group the excerpts in a clear and consistent manner. I selected a few excerpts that captured the essence of a particular congregation's transition process or learning during transition to use in the chapter introducing each congregation. I then used additional spreadsheets to identify patterns of learning that occurred within and across congregations, including similarities and differences in learning between congregations, learning patterns associated with participants' role in their congregation,

and patterns associated with whether learning was best identified as informal or incidental. I compared the learning steps reported in the stories with the informal and incidental learning model, and noted the processes and patterns of steps observed by members, within each congregation, and across congregations

Field notes and other observational materials were used simply as additional descriptive data to enrich the descriptions of the congregations and support mentions of church events in the interview data. I created a spreadsheet of each observation and any material I had to support that observation, which helped me keep the observation data organized. To analyze the documents, I sorted them by congregation, category, source and function. Maxwell (2005) identifies several strategies for analysis including memos, categorizing and connecting. Using spreadsheets I organized the data by listing each one and using columns to describe the congregation, category, source, and function of the document. These documents were then primarily used in the descriptions of the congregations, to reconstruct the story of the transitions, and to aid in understanding of mentions of them in interview data.

As a quality check on analysis, I planned to return to the congregations when possible to conduct member checks on the data and findings. At the time of this writing, I had invited all three congregations to hear my interpretations of the data before they were prepared for publication and gather their responses, intending that their feedback would be included in reporting as part of the research process (Stake, 1995). Two congregations, Urban Congregational and Suburban Presbyterian, agreed to schedule an event before the submission of this study. Urban asked me to present as a part of their worship service, and normally have no time blocked off for a lengthy non-spiritual piece of content. I proposed the option of sharing it in the form of a sermon, but they already had a preacher scheduled for that Sunday. I then

proposed presenting it in the form of a reading during a time when they typically read scripture and other modern readings such as poetry or narratives. When they agreed, I developed a research report in the literary form of an Epistle, in the tradition of the Epistles of Paul in the New Testament of the Christian Bible, and read it as the Modern Lesson for that day's worship service. I prepared a similar Epistle for Suburban, which I presented at a Wednesday night program. Excerpts from my Epistle to Urban are presented in Figure 2 below.

A Letter, in the tradition of the Apostle Paul, inspired by (and some language taken from) Paul's First Epistle to the Thessalonians, in *The Message*...

I, Anna, bring greetings to you all at Urban UCC, all of you Christians assembled here by God our Mother and Jesus our Brother. God's amazing grace be with you! And God's loving peace!

...

When I was with you, I heard stories of how you learned during your time of merger and transition about your congregation, about different preaching styles, about your own faith, and about the stories and faith lives of your fellow members.

You sought out learning through small groups, through worship, through individual research and study.

You learned how to be with one another, about personal boundaries, and how to make decisions together, and how to fulfill your responsibilities and leadership roles.

Although many of you are fairly new to this congregation, you learned about its living out of values such as welcome, and openness, and accessibility, and uninhibited fellowship.

...

You reported learning during all areas of congregational life. Appreciate and reflect on these lessons you find in every moment of worship, study, and fellowship together. Plan time to talk together, to critically reflect on this learning and how it is shaping your life and faith. This will help new insights become real and fully formed within you.

You reported learning from the changes your church has experienced. Don't fear the times of disorientation and struggle. Transformational learning cannot happen without disorientation. God has in fact invited us into something disorderly, unkempt holy and beautiful—a beautiful, transformational mess.

...

And pray and thank God regularly. You will find yourself filled with a sense of connection and gratitude that makes even the smallest of learning experiences a spiritual lesson.

...

Figure 3: Excerpts from the research report to Urban Congregational.

I distributed printed copies of the letter to those present, and made myself available after the worship service or at the educational event for questions and feedback. Congregants expressed gratitude and interest in the presentation, and mentioned that it was nice to hear that there were learning outcomes from their congregation's struggles, especially when described back to them through an outsider's eyes. Their questions focused less on modifying the findings than on the larger scope of the research across all three congregations. Suburban in particular asked many questions about the decline of the larger Church and how churches might face that uncertain future, which I spoke to out of knowledge drawn from my work with renewing churches through the Center for Progressive Renewal. I left behind printed copies of the letter I read to the congregation, and the congregation's lay leaders at Urban asked if they could distribute it electronically to others in their congregation, which I said would be fine. I offered to make the final manuscript available to them and come back to discuss the research further on request. Although these member checks yielded no significant additional information, as is common (Stake, 2005), they did provide an opportunity for participating members to give me feedback on the findings, as well as identifying any bias and blind spots in the research methods and analysis (Simons, 2009).

Quality

Quality can be expressed in many ways, using terms such as validity, reliability, rigor, among others (Roulston, 2010). These can be summed up as ensuring the findings are well supported by evidence obtained without bias in ways that can be replicated by other researchers with similar results. Denzin (2009) notes conversations about quality and evidence must be grounded in conversations about who controls the definition of evidence. Different contexts approach differently the idea of evidence in qualitative research. Although US regulation of

Human Subject Research introduces certain guidelines for ethical practice, there is currently no national or broadly applicable code of quality and rigor in qualitative research (Denzin, 2009). Certain organizations have begun to develop guidelines, the most helpful of which focus on transparency, external validity, reliability, confirmability and adequate evidentiary support for all findings (Denzin, 2009).

The success of this study depended on the quality of the data collection and analysis. I have worked to include considerations of quality in every phase of the design of this study. Gibbert and Ruigrok (2010) recommend taking and reporting on concrete research actions to ensure validity, and there are many actions that can serve this purpose, such as transparent reporting of methodological choices, decisions, and actions, proactively addressing internal and construct validity, and turning setbacks and resource limitations into opportunities to improve strategies of data collection and analysis. Roulston (2010) further suggests quality can be improved by spending months or years in the research setting, and I spent months with each of the congregations I studied.

Validity is defined as “the degree to which evidence supports any inferences a researcher makes” (Fraenkel & Wallen, 2006, p. 151). Cho and Trent (2006) suggest the current definitions of validity may be extremely limited in their applicability to qualitative research, yet some qualitative scholars address validity in qualitative research. Merriam (2002) recommends matters of validity are best handled once a study is underway. Conversely, Maxwell (2005) recommends considering validity in the design phase as one element of quality research and identifies two primary threats to validity: researcher bias and reactivity. Accordingly I have addressed validity in the design, data collection and analysis.

Bias has been addressed through a design that includes inductive coding, or using the data itself to develop codes and collect those codes into themes. Bias was addressed throughout the study by acknowledging the lens I brought to this study (Roulston, 2010). As someone who is now a pastor, who experienced several pastoral transitions as a lay member and as church staff, I worked to note whenever my own experiences and assumptions were affecting interpretation of the data. A consciousness of how my presence could affect participants and context was present throughout data collection, and hopefully aided in reducing bias and reactivity (Etherington, 2004; Maxwell, 2005). In particular, I had to bracket personal strong feelings in favor of marriage equality when engaging the congregation that was grappling with this issue and made decisions that limited marriage equality in their congregation. I found myself working to keep my affect open as I heard of their reading and research to support their decisions and to hold back thoughts and opinions as they reported learning things that I would characterize as inaccurate in terms of scholarly biblical interpretation, if asked about them in another context. So working to remain conscious of my own ideas and opinions and bracket them to keep them from affecting the research was no small task.

However, it is not possible to eliminate all subjectivity from qualitative research. For example, this study would not exist if I had not been through pastoral transitions during time as member, lay leader, and on staff at several churches, and thought I had seen evidence of learning there. We are never researching in a vacuum, and our own experiences inevitably shape our research and work. Thus I have simply tried to let participants tell their own stories and the stories of their pastoral transitions, by privileging their own words in analysis and writing.

Reliability means ensuring another researcher would derive the same findings if they attempted the same study in the same context at the same time. I tried to ensure the reliability of

this study through methodological triangulation between the types of data in this study (Maxwell, 2005; Roulston, 2010; Stake, 1995). I triangulated by conducting interviews with multiple participants (Roulston, 2010; Seidman, 2006), and avoiding leading questions in interview protocols (Johnson, 1983; Kvale & Brinkmann, 2009).

The aspect of quality called rigor is most often discussed in positivist frameworks, but Gibbert and Ruigrok (2010) note discussions of rigor in qualitative research simply highlight issues of quality such as validity and reliability. They suggest rigor in qualitative case studies is best ensured by focusing on internal and construct validity, or ensuring the study investigates what it claims to investigate and adequately supports any findings with research data (Gibbert & Ruigrok, 2010). Strategies toward this end in this study included triangulating between multiple data sources, performing member checks, ensuring transparency in data collection and analysis, connecting the research design to the literature review and research questions, and incorporating all data into analysis (Gibbert & Ruigrok, 2010; Roulston, 2010). This study included interviews, document analysis, and observations to allow triangulation between multiple data sources; and this study concluded with a member check at one of the research congregations. External validity (called generalizability) and reliability are less vital to qualitative case studies, but can be improved through transparency in research design and process and careful transcription of recorded data, both of which I included in the research design, as outlined above (Gibbert & Ruigrok, 2010).

Insider or Outsider?

The terms *emic* and *etic* are often used to explore issues of insider/outsider status in qualitative research, with *emic* referring to knowledge and interpretations that exist within a local culture or environment and *etic* referring to generalizations the researcher might make about

local practices and understandings (Headland & McElhanon, 2004). In this case, I was attempting to discover the participants' emic knowledge and understanding of their experiences and learning during a pastoral transition. The interpretations and findings that arose from the analysis of the interview, observation, and documentary data were inevitably shaped by the etic perspective, as a non-member of the particular community. Further, since I am familiar with the culture of the congregations where I have been involved or employed, yet conducted my research within a different congregational culture, I was both an insider, as a seminary-trained church employee and no stranger to Christian belief and practice in congregations, and an outsider, not being a member or staff in the congregation under study. This echoes the assertion by Deutsch (1981) that "we are all multiple insiders and outsiders" (p. 174). Labaree (2002) noted in research, being an insider can offer advantages in access and understanding and disadvantages such as ethical and methodological dilemmas around relationships, disclosure and disengagement. It is true that sharing the language of Christian faith and practice offered me advantages in access. That shared language could have proven disadvantageous if I was careless in probing for participants' understandings of language rather than assuming they share my own. I found it was crucial to be clear with participants that I am not with them as a pastor, but as a researcher. Additionally, Cohen (2000) notes that participant observation can force researchers to face alienating and conflictual situations. As participants' stories had the potential to elicit emotional reactions in me that related back to personal experiences of pastoral transition, I worked to maintain careful reflection throughout all stages of research to bracket and acknowledge those preconceptions I bring to this study.

Representation

A final consideration in designing this study was planning for the representation of data and findings. One key decision in research reporting is confidentiality and the use of pseudonyms, as Guenther (2009) observed these decisions impact relationships with participants and the findings emerge from those relationships. As noted above, I have protected confidentiality by changing the names of both the congregations and their members, and changing any identifying details in the findings could threaten confidentiality.

A primary concern in reporting is providing adequate evidence from the data for all of the findings (Roulston, 2010). As in data collection and analysis, one recommendation for quality representation is to use multiple methods to represent the data and findings (Amis & Silk, 2008). Data that has been analyzed thematically can be presented thematically (Roulston, 2010), and representation is organized accordingly.

Another decision in representing data is how much experiences as the researcher should be included in reporting. Reflexivity means the life and presence of the researcher is acknowledged, and the processes of data collection, analysis, and reporting are made transparent (Etherington, 2004). Inclusion of researcher stories is most useful when it improves the quality of the research without distracting from the stories of the research participants. In this study, as a participant observer to the extent I can be in a congregation where I am a non-member, I chose not to tell my story but to privilege the stories of the congregations I study and their members since their experiences are the focus of this study.

Significance

Since qualitative research, including case studies, is rarely intended to be generalizable (Stake, 1995), a primary concern is that data and findings accurately represent the contexts

studied (Maxwell, 2005). Case studies are interested in the uniqueness of each case and their commonality with other cases (Stake, 1995), so comparing cases was not a primary goal but occurs to some extent in this multiple case study. The results of research on leadership transitions in three dissimilar congregations is not universally generalizable, as every congregation and faith community is different. This study merely provides a starting point for further scholarship and theory in the areas of leadership transition and informal learning in congregations and other contexts. Noting those commonalities between the congregations provides insights on what might be common to other congregations as well, and what congregational characteristics might impact informal learning during leadership transition and church life overall. Finding evidence of informal learning during leadership transition supplies a solid ground to begin theorizing about how transitions impact congregations and other organizations, as well as how informal learning occurs during leadership transitions in various contexts. This research provides a foundation for future prescriptive work by myself or others on midwifing congregations through transitions into their new futures. Thus the significance of this study is in its glimpse into three unique cases and offering a springboard for further theory and research.

Chapter Summary

The theoretical framework for this study included ideas about experiential and informal learning in community and leadership transitions. These ideas guided the design of this study and the ways I enacted that design. Using a multiple case study approach including interviews, observations, and document analysis allowed me to explore the experiences of active congregants in three dissimilar Christian congregations in the midst of a change in their lead pastor; detect the presence, content, and dimensions of informal and incidental learning in individual congregants and in the congregations as whole organizations; and probe the influence,

if any, of organizational characteristics on learning. I included multiple elements in the research design to ensure quality during every stage of research, such as triangulation, reflexivity, and member checks, to name a few. This study provided fruitful information on the unique cases under study as well as laying groundwork for future research in informal and incidental learning in congregations and other contexts and member effects of leadership transitions, all of which will be outlined in the following chapters.

CHAPTER 4

THE CONGREGATIONS IN TRANSITION

A pastor announces his retirement on Mother's Day and after a year of transitions in every staff position, the congregation smoothly and unanimously calls his replacement just over a year later. Another pastor retires and the church seeks a new pastor for years while grappling with a controversial political and theological issue. A third pastor leaves suddenly while a congregation coping with many changes taps existing staff in order to move forward without delay. In these three congregations, I spent months visiting, observing, collecting documents, and interviewing members about their experiences and learning during transitions. Each congregation had its own unique story of pastoral transition, and all of their transitions were shaped by their distinctive context. Each member had their own stories of learning.

The Purpose of the Study and Research Questions

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in two Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition, during the period between the exit of a lead pastor and the employment of a successor. The questions that guided this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?

2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study will focus on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations and probe the influence of organizational characteristics on learning.

The Three Churches and Their Members

To create the descriptions of the three churches that participated in this study, I read through observation field notes, reviewed any audio or video recordings of the churches provided by the churches, any documents provided by the churches, church websites, and excerpted descriptions of the churches provided by interviewees. After reviewing these sources of data, I drafted a narrative sketch of each congregation, and then compared it back to data sources to ensure as much accuracy as possible. However, I acknowledge that in these subjective impressions of the churches, as well as interpretation of the data sources available to me, there could be areas where these vignettes vary from the reality of being a member or staff in the congregation. Further, I have omitted or changed any highly identifying descriptors, to preserve confidentiality. Each church section includes what I saw and heard on church observations, information from the collected documents that related to the characteristics of the congregation, and excerpts from research interviews where participants described their congregation and their learning experiences during transition.

Smalltown First Baptist Church: “Seeing God's will manifested”

Smalltown First Baptist Church sits a block off of the main street in a small foothills town. At Smalltown I was able to interview four members. I conducted observations, as well as examined documents shared with me about and during the transition. Christine, an older white woman of around 90 years old, met with me in her semi-detached home on the edge of town. I met with the other three members in various rooms around the church. Valerie, a young white woman in her 20s, is a teacher in the local schools. Jack, a retired white man in his 60s, volunteered to help with the tasks of administration during the transition. Ted, a member who served for years as music minister of the church, a white man in his 60s, served on the search committee for the next pastor.

Valerie described the church as, *“a second home. ...I think a lot of people would, too, because all of the programs that they have and everything that we have and we offer to people. ...I feel very comfortable here. I get excited to come here. ...It's not a Southern Baptist church but it's not really new age either, kind of somewhere in the middle. I always say we still use a hymnal We don't have worship and praise music that often.”*

Ted said the church is *“a main line Baptist church the way Baptist churches used to be and this one still is. ...Worship style is still traditional which is much less common than it used to be. ...We don't even have a projection system in the sanctuary. It wasn't done as a symbol. We didn't need it so, we didn't put one in. We did spend two hundred thousand dollars on a pipe organ which is also sort of indicative of where we are worship style. ... We have people that...drive down here because they want that kind of worship and they also want to be in a moderate church. They want to be Baptist.”*

Jack said the church is, *“a free Baptist church. ...we would probably be described by others as a moderate Baptist church.... We are a church with a significant aging population....Our average attendance is...anywhere between 200 and 250 on a Sunday....A good word for our church would be: it's a sweet fellowship. Seldom would you hear arguments or dissension, at least out in the open, in this congregation. Whereas some churches may have church conferences where there's arguments and confrontation. That just doesn't happen here.”*

Christine said of Smalltown, *“[Smalltown] is a really good church. It's my family, especially since my husband died. ...I love the church and they love me back. It's just a wonderful church. ...It's an active church. It's a missionary church. ...The membership is very friendly and it's a good place to find good leaders and good learning experiences as a Christian.”*

During visits, I observed that the campus, made up of two red brick buildings and a connecting wing, sits at a busy red light intersection and faces a Walgreen's across the street. Its next door neighbor is a CVS. The leftmost building is clearly the newer, with a contemporary but traditional church appearance, faced with a columned porch and topped with a tall white steeple. A large portico to its left allows drop off and close parking for those with disabilities. The building to its right has the appearance of being the original sanctuary, having a mock columned entrance with an arched window above a double French door. The primary parking for the church is to the right of the older sanctuary building, and behind the connecting wing. A wood and brick non-electronic sign out front displays the name of the church. There is a sidewalk along the road in front of the church, but other than myself, I saw no one walking along it to enter the church.

On entering the church, a spacious two story atrium filled with light from the multiple French entry doors and windows above contains a round table with information about the church,

a few formal sofas, and one or two older gentleman welcoming and passing out bulletins. There is a sign indicating restrooms are down the hall to the right, and that additional parts of the building can be accessed down that hall as well. The majority of those coming into the space are entering from that hall, rather than outside. A few people are entering from the portico area.

Opposite the entry doors are a set of French doors and just past them, two sets of stairs, all three providing entry into the sanctuary. The stairs lead to the balcony section. Upon entering the French doors, the space opens up, with high ceilings rising to a center point, three sections of pew seating, and a front raised area containing a podium, choir loft, and several chairs. This area is backed by a baptismal font flanked by two sets of organ pipes. Fronting this raised section is a piano on the left, an altar table in the front, and an organ console to the right. The space is painted a yellowish off white, and the ceiling and floor are golden wood, the ceiling having beams in the yellowish off white breaking up the wood. The balcony contains several sections of pews and an audio visual control center. In each pew, brackets contain hymnals, bibles, and offering envelopes.

A typical service begins with music, often trumpet, followed by some announcements and then an opening prayer. Much of the service is liturgical, in the form of responsive prayers and sung responses such as the Gloria and the Doxology. A hymn or choral offering separates each piece of liturgy. At one point, all the children are invited to come down for a children's sermon, which is amplified for the whole congregation to hear. The children then leave for a time apart from the adults. The sermons are narrative in structure and typically 20-25 minutes long, shorter on Sundays when communion is offered. Communion, offered only on occasional Sundays, is passed around in small cups with wafers, and the celebrant blesses them once all are handed out, at which point the congregants eat and drink them. There appear to be around 150-

200 people in worship each week. Hymns are traditional, and tend toward those written in the late 19th and early 20th century. There are no screens or other multimedia components to the sanctuary or the service.

The first week I attended, the congregation was asked during the announcements to pray for the search committee, that they might be able to work expediently and effectively. The announcement said the committee would make their short list that night of who would be interviewed, the most important phase in their work so far. Also announced was the departure of the youth minister, who said she had stayed for stability but now had to take another opportunity. A supply youth director has been hired for the summer, until the new pastor can have an active role in selecting the new youth minister. Those doing the announcements sounded optimistic that the new pastor will be hired by the end of the summer. People are asked to pray for these transitions and attend the meeting after worship to learn more.

I was able to attend a meeting after worship with a covered-dish meal and a reception to introduce the candidate for pastor. The meeting was nearly at capacity, with very few open seats in the room which appeared to seat about 65-80. Members demonstrated a welcoming and friendly nature and sang hymns joyfully to open the meeting. The business of the meeting consisted of a series of reports from committees that revisited the announcements above in more detail. The reception for the candidate was of the drop-in variety, with light snacks and sweets provided. The candidate stood in a receiving line of sorts as people stopped in to introduce themselves and ask questions.

Communication at Smalltown is done primarily through email. Christine said, *“Sometimes we have an e-mail that would tell us that we're searching for a Sunday school teacher for so and so. Usually, the secretary gave us lots of information ... A lot of it was passed*

through her through e-mails to the whole congregation.” Valerie also mentioned emails as a frequent source of learning about church news and events.

A Change in Pastors at Smalltown: A Season of Transitions.

In May 2013, on Mother’s Day, the pastor of Smalltown announced from the pulpit that he would be retiring at the end of June. Members described learning that the pastor was going to leave. Jack remembered learning through an announcement on Sunday morning that the pastor was leaving. *“Our pastor totally out of the blue ([for] most of us, but I think it’s all of us), ...walked in on Mother’s Day Sunday morning and said that he was resigning effective the end of June. That caught our entire congregation by surprise. We had all these other positions that were already vacant or occupied by interims.... That caught us very much off guard, so there was a lot of shock and awe I guess in the congregation.”* Valerie observed, *“I guess it was more in our eyes, abruptly. When you don’t know what goes on behind the scenes and someone just comes in on Sunday and he’s like, ‘You know, it’s my time to go.’ He had been here for a while but it just seemed like, ‘Oh my goodness.’ You couldn’t believe that was happening. ...It’s hard when they do come in on Sunday and it’s like, ‘Okay, after the last final song of this Sunday, we have to go into church conference.’ You just get this feeling like, ‘Oh, it’s happening.’”*

This was a season of multiple transitions for Smalltown. Between 2013 and 2015, every staff position turned over at least once. Smalltown’s long time music minister had retired during 2013, and the church was already searching for a children’s minister when the pastor announced his retirement. Both of these positions were filled during 2014. By early 2014, the youth minister and administrative assistant positions were vacant as well, and the children’s minister hired the previous year departed the church in September 2014. Christine remembers, *“The most recent transition really started with the children and youth minister. ... They did not form a committee*

at first to replace her ... Then about three months after she resigned, the music minister that had been here thirty-seven years ... retired....That was a big transition but we had an excellent interim music minister and he was with us for just over a year, and then the pastor resigned.... Since then, we've been really in an upheaval because of the changes that were just taking place.”

Smalltown's lay leaders had to determine the **next steps** after the pastor's departure. Jack tells of determining how to move forward after the pastor's departure, *“it was just ...getting people to step up and fill the holes and they did.”* In June, the congregation held its first informational session on the search for a new pastor and took nominations for a committee to search for an interim pastor. By September, the church had formed a search committee and by October, located an interim pastor. The interim pastor at Smalltown was not full time, but was responsible for the majority of preaching and some visiting duties during his tenure.

This committee worked together for 7 months and then, in May 2014, announced that they had identified a candidate for the new pastor. In early June, the congregation was given information about the candidate and invited to participate in a Q and A session with the deacons about the candidate and the process. In late June, the candidate came to town for a candidating weekend, which included meeting with various leadership bodies and a reception to introduce him to the congregation, along with preaching in the worship service that Sunday morning. After that worship service, the congregation was allowed to vote on whether or not to call the candidate, and voted in favor of his call. There was an enthusiastic round of applause after the vote, and all were invited to speak to the new pastor and his family in a receiving line after the service. The new pastor began his tenure in late July.

Stories of the Transition at Smalltown.

Members at Smalltown spoke of learning faith, their congregation, and engagement levels during transition.

Christine: *“I learned along with others patience because you can't rush things. You have to wait on God.”* Christine’s learning during the transition included learning about the ability of volunteers to fill in the gaps left by the departing pastor, the search process, the congregation’s desires regarding a new pastor, having patience, and trusting God. Learning **triggers** included observing volunteers step up to fill gaps, announcements and forums, a congregational survey, and simply living through the process. Christine typically **interpreted** these **triggers** through the **context** and **frame** of her faith and beliefs about the congregation. In Christine’s case, learning did not involve intentionally acquiring **knowledge** and **skills** or **testing solutions**, but she did seem to **extract some lessons** and new **knowledge** from her experience.

Christine told of learning the **lesson** that *“we had have a lot of volunteers doing things that we didn't have trained professional to do...because it takes that.”* She described the **trigger** for this learning, *“On two cases where they just volunteered One was the Wednesday night Bible Study Service, because in the process of losing the staff members, we had [lost] ...prominent members that filled a lot of these jobs. This one young man stepped up and said that he would do the Wednesday night Bible Study for us and he was excellent. He filled in for all those months until the pastor came. The other one... stepped up and he knew how to do it and he was our volunteer administrator until the pastor came. ...[T]hey felt led to do it and the church was delighted to have them do it.”* She described her use of her existing **knowledge** of the church intersecting with the appearance of surprising sources of help, *“I understand the church*

pretty well ...[and] we had some people step up that we wouldn't have thought would fill in like that, really good people.”

Christine recalled learning about the progress of the search process through hearing from the search committee during announcements at worship and events. She described the **trigger** for this learning as *“they just told us a month or so before... that they had eliminated it down to five and they were considering those five and that they were looking to eliminate it to one or two.”* She went on, *“they eliminated it to one really quick and they were really shocked and pleased when they had the vote.”* Christine remembered a time when the interim pastor made an announcement that *“Sunday morning that they would be interviewing someone and they would get back to us and tell us what happens.”* She said that, *“the main information... is given to the congregation on Sunday morning.”*

She explained how talking to other members helped build a sense of love and reassurance during the transition. *“You always have close friends and they're the ones you talked to ..., that's who your friends are. I guess we had to reassure each other, and there's more people doing the reassuring than there were people that were really uptight about it. I guess just a lot of prayer and a lot of love, that you have to have between church members, because we're a family and we have to learn to love each other more.”* Although this language echoed her **frame** of description of the church as a family that loves each other, she expressed surprise at the degree to which it occurred. *“It's surprising how, I think, everybody learned to love somebody else that they did not really know. They got to know people better.”* She **interpreted** the reasons for these connections to the special nature of the church in light of her **frame** of belief about the church. *“I'm sure we're different. I'm sure there's no other church like this one. It didn't seem any problem to fall in together to pray and wait.”*

Christine recalled learning more on the search process and how it was progressing, **triggered** by special meetings designed to inform the congregation. *“Sometimes there was a special forum called... on Sunday morningWe would have a congregation meal and then discuss business. It was not a business meeting... just a forum, and so we learned a lot that way.”* She went on, *“and then they often came on Wednesday nights in between the Sundays to tell us things to keep us up to date. ... either committee chairman or somebody on the committee and also the deacons.”* She remembered, *“we could also ask questions if we needed to on Wednesday nights. We didn't do that much on Sunday morning.”* She continued, *“the committees were good about making reports on Sunday morning when most of the congregation was there... The chairman didn't always speak. He would have somebody on the committee come and speak to us and so that worked really well that we had reports from them to know what they were doing.”* She said after every announcement, they *“always said you can come to the members of this committee and ask questions or you can come to the deacons and ask questions or both, whatever you need to do. They were open to questions and opinions.”*

Christine particularly learned from these communications about the role of the congregational survey in the search process and about the congregation based on the results of the survey. She explained, *“they used those surveys to determine how the committee would look for a pastor and that was input from the congregation itself They said it was very helpful to have that survey.”* She described the data collection process of the search committee, remembering that the committee *“handed it out on Sunday mornings and it was on the Internet, on the e-mail, that thing. Everybody had access to it and they gave us a couple of weeks or so to look it over and turn it in. It was picked up on a Sunday morning and then the committee put it all together and went over the thing.”* Christine said she learned from the **trigger** of this survey

report that *“the congregation wanted a shepherd. I guess, the second most had something to do with his preaching. ... it was interesting that it came out that the congregation really was anxious to have a real pastor shepherd.”*

She named another learning **trigger** in a conversation with one of the search committee, *“I think they were surprised about some of the priorities, how the priorities stacked up, because I had one of them say that it was surprising it ended up the way it did.”* She **interpreted** that information to mean *“that they didn't know the congregation as well as they thought they did until they did the survey.”* So she learned that the search committee itself can be said to have learned from the survey. She noted how her **interpretation** of the survey results shaped her **frame** of expectations about the new pastor, saying, *“it's interesting that the survey entered into the picture of the pastor they chose. Since that was the case, we knew what to expect when he was coming.”*

Christine described learning to be patient and wait on and trust God, from her experiences during the transition process. Christine described the church **context** after the sudden resignation of the previous pastor as anxious, saying that *“for a short time there was anxiety. People say, ‘What's going to happen?’”* She recalled her initial response to that anxiety, stating *“I say, ‘Well, God's in charge.’”* This suggested that her **contextual frame** was already focused toward the importance of trusting God. Yet she pointed to a **trigger** for learning as an urging from the committee during reports to have patience. *“They urged us to be patient. I guess that's the main thing that we learned...”* She further remembered how hearing the story of the final vote for the candidate supported the idea of God's will playing a role in the process. *“They told us that, when they made the report, that the entire committee voted it immediately for this one candidate.... [that] when they came down to it, there was no question the one we've had was*

*it.... Most of them said they've been thinking about him all through the process.” She says that the committee “told us that and liked it too. They smiled. They were pleased that's the way it went and that they felt like that we'd all been praying for God's will to be done and the right man to come and that that was the way it happened, because if he was the one people would be in one accord in the committee.” Earlier in the interview, Christine summed up her **lesson**, saying, “I guess, if anything, I learned along with others patience because you can't rush things. You have to wait on God. You can't run ahead of Him.” This insight fit in well with her previous **frame**, reinforcing it and potentially strengthening it, but not causing a significant reframing.*

Valerie: *“I didn't understand too, I guess, the way the church feels without a leader.”*

Valerie's learning during the transition included learning about the search process, different styles of preaching, the congregation, and how the transition affected her levels of engagement. Learning **triggers** included talking to friends and family, a congregational survey, and navigating decisions about attendance during the transition period. In Valerie's case, she primarily learned from her experiences as the wife of a search committee member and as a congregation member, which left her with new insights into the work of a search process and her feelings about participation and engagement with the congregation during the transition period.

Valerie noted that one **trigger** of learning about the search process was through official church emails and communications, *“we have email blasts all the time.”* She went on, *“they would show things about the Pastor Search Committee, if they were doing some type of event where they wanted people to come, that type of thing. They send these letter[s] and the church bulletin, all these had information in it, but I'm all about the email.”* She pointed to observing her husband's work on the search committee as another learning **trigger**. Valerie remembered, *“it did seem like it was very involved. My husband met all the time. I mean, they had meetings*

almost every Sunday. If they didn't have meetings on Sunday, they would be doing something at home. It just seem[ed] like that they were continually busy, but it was a long process.” She reported this **lesson** drawn from her observations intersecting with her personal experiences as a teacher, *“I didn't realized that there that many potential candidates. I've come from the teacher perspective and there's tons of people who are willing to be a teacher but ... the number of resumes and seeing the amount of people You know that people are coming to visit and they're preaching because they want to be here type of thing. You know they're trying to impress you. It was just interesting seeing the amount of people that were interested. It's a good thing because people want to be a part of your church or want to come here.”* She pointed to a larger **lesson** learned, *“if you're wanting to find the right person, I know you've got to take the steps it takes to get there.”*

She went into further detail later in the interview, saying *“Before, I didn't understand much about the whole process at all. I just knew this person was leaving and this person would come in. Now, I just think I know more about the process in general. I understand when a new preacher comes, different things will happen. I guess the whole process is different for me because before, I just pass it on, ‘We'll find somebody else.’ Now, you're actually ...more genuinely invested in who you're having in the church. It means more now to you because in my situation, I think, if I were to have a family, that type of thing, you think through all these things, ‘Is this the right step?’”* She **interpreted** this new information about the process of hiring a new pastor through the lens of her current **context** in life and in the church.

Valerie reported another **trigger** for learning in the different styles of preaching due to the variety of pastors who supplied guest preaching during the transition. Valerie noted that *“it was interesting to see different styles of preaching.”* She compared this experience with her

existing **frame** of understanding, saying *“I don't know much about the actual academic part of being a pastor and the different styles. It was interesting just to see the differences between people and how they chose to go about things and even what they preach about.”* While she could be said to have learned that there are differences in preaching styles, any further **lesson** from this experience is as yet unconfirmed, as she noted being left with more questions than answers when thinking about preaching in a way she hadn't before. She recalled, *“Oftentimes, you wonder if they're coming here and they wrote a sermon for here,” or if they “pull[ed] it out and they thought, this would be best.”*

Valerie remembered the congregational survey as a **trigger** for learning about the preferences of the congregation. She recalled, *“I remember taking the survey and I remember [a search committee member] compiling the results and talking about the results of the survey. ...That was a very interesting time to see people, their opinions and how different things match up. It was really interesting to see that, to reflect on the data from that.”* She went on to explain that a **lesson** from that for her was the preference for a younger pastor. *“I was surprised by some things. He told me very little about it. The biggest thing I think in our church is age, that age expectation of your pastor. For anyone my age, they prefer someone younger, with a family who is more involved in things that they're involved. [That] people who are a little bit older prefer that type that was interesting to me. Even in talk[ing] with people, that was the biggest surprise, being the age of the pastor.”* This **lesson** challenged her **frame** of thinking about what older people might prefer in a pastor.

Valerie additionally observed that she felt a different feeling in the congregation during the transition, and pointed to that as a source of learning about engagement during times of transition. Valerie says, *“I didn't understand too, I guess, the way the church feels without a*

leader. *I think we've went through that a good bit.*” Valerie recalled a **trigger** in her own feelings during this transition, *“I didn't feel that same connection. I enjoyed coming, [but] I didn't come as often during that time. It's like you have to find that person who you connect to and who you feel like you can learn from. It's hard when it's not consistent. If your interim can't be here, then you have like an interim interim. It's just like, ‘Who's going to be here on Sunday?’”* She went on, *“We have lots of great people come and speak but I'm a person who needs consistency and routine in one person. I felt like during all of that transition for all these so many times, it will make you disinterested in coming to church when you didn't know who is going to preach. You had no real connection to people who were just in and out.”*

She drew on this feeling to make some conclusions about the feelings of others in the church, *“I think the people felt like there's no consistency at all, especially when we lost the music minister, the youth minister... all at once.”* She **implemented** actions deriving from this feeling by participating at a different level of engagement. *“I didn't come to church as much when we didn't have a consistent minister.”* She summed up, saying, *“That is probably the biggest **lesson** that I didn't realize how much I like having a consistent person until I didn't have that person.”* She **interpreted** from this experience, *“I think that's probably true for a lot of people. When things aren't consistent, you don't buy into it as much where you didn't want to be as involved, so you find other ways to do things.”* This differed from her **frame** of understanding the church as somewhere she felt comfortable, and this new feeling conflicted with her **frame** of understanding her relationship with the church, although it did not seem to change this **frame**, as she still described the church as somewhere she felt at home during her interview..

Ted: *“It is one of the clearest times of my life of seeing God's will manifested.”* Ted’s learning during the transition included learning about how to conduct the search process,

congregational preferences for a pastor, and God's role in the search and call of the new minister. Learning **triggers** included church records, denominational staff, collaboration with the committee, the congregational survey, and experiencing the decision making to individually and collectively discern the best candidate for pastor. In Ted's case, he **acquired** needed **knowledge and skills** about the congregation and how to conduct a search, **implemented solutions** and utilized that **knowledge** during the search process, and experienced significant confirmation of his **frame** of beliefs about God and God's role from his experiences on the search committee.

Ted told of learning how to conduct a pastor search through documentation of previous searches, denominational authorities, and developing the process while on the committee. He described congregational records and information on searches at other churches as initial **triggers** that informed the formation of their process. He noted that collaboration among the committee shaped the process early on, describing how the "*committee started meeting in September. Basically had an organizational, not even an organizational meeting. We just got together and started talking about how do we want to do this.*" He went on, "*We looked at information that other committees at other churches had used. We got a lot of detailed information from the last two pastor search committees of our church and how they had functioned.*" Ted pointed to denominational staff as another **trigger** for learning how to conduct the search. Ted remembered meeting with the "*head of Cooperative Baptist Fellowship in Georgia.*" This liaison "*preached for us one Sunday and then met with committee.*" Ted remembered a **lesson** imparted by the liaison. "*He said, 'You need to decide whether you're going to spread a wide net or whether you are going to go with the wise old owls', is the way he put it, 'and talk to certain people that will recommend their top five.'*" Ted relayed how this advice influenced their actions. "*We leaned more toward that although we did put the ad in*

*Baptist Today.....When I contacted those state CBF members I asked them to put it on their website, but I also said, 'If you have anybody specific you want to recommend please do that.' They sent some names.” Ted remembered another **lesson** from the denominational staff, one which was confirmed by the experiences of the search committee, “He said, ‘You're going to get some of the names over and over.’ We did.”*

He described how the committee **acquired the information** they needed on the congregation’s preferences for the new pastor. “*We prepared and distributed a survey throughout the congregation...we listed characteristics of a pastor and asked them to write those characteristics, what is the most important characteristic...Then we compiled the results.*” They used the information acquired from this survey to shape their **next steps** to narrow down their list of candidates. “*We asked our top ten candidates to also fill out that survey and to rate themselves without telling them how the congregation had voted, of course, and to also elaborate on that. Why what you list as number one, number two, number three. Why do you list that way? Why is this characteristic important to you? It was very, some of them lined up so beautifully.... Some didn't at all.*”

Ted additionally described a few ways he worked toward increasing the knowledge of the congregation during the search process. He mentioned informing the church about the search process through church conferences, saying that “*usually in the spring and the fall we have forums which are not really conferences... a time when things are discussed and questions can be asked. When there is anything major going on, when we are getting ready to adopt a new budget, when we're looking for staff members, things like that.*” The committee used this format which was part of the church’s normal routine to aid in their communications with the congregation. “*When we were ready to present [the new pastor] to the congregation we had a*

congregational meeting and answered every question that anybody asked.” He reported that, “it was well attended and I think it was helpful in disseminating information for things like that.” He pointed to his own practice of keeping records for future committees, “I have a file folder at home that has got stuff written down.” He went on to say that “the secretary of committee kept good minutes. I’ve got that, not so much for myself, but if the church ever needs it.”

Ted’s most significant story of learning occurred during his work on the search committee. The **trigger** for this learning was his experience on the committee leading up to the final vote. He recalled, *“there were, of the four candidates, there were two...that were just to me, they were heads and shoulders above the other two. The other two were good, but they were equal. I had told my wife if it gets down to these two I am going to have to be Biblical and cast lots which means flip a coin.”* He recounted that one candidate *“took himself out of the process. I told my wife what had happened and she said, ‘How do you feel about it?’ I said, ‘I am disappointed and incredibly relieved.’ I know the committee would have been really split.”* He went on, *“I found out after that meeting where we voted that two different members of the committee talked to me privately later and said, ‘I came into the meeting planning to vote for the other person,’ and listening to the discussion, even though nothing negative was said, only positive, and listening to discussions they changed their minds.”* Ted **interpreted** these events in light of his faith, *“I say, well, yeah, they changed their minds, but you know, God stirred the pot. I consider it a wonderful story. Even though I don’t ever want to do this again, I am so grateful that I got to be involved in that. From that perspective it is one of the spiritual highlights of my life.”*

Ted related that the experience shaped his **frame** of opinion of the committee and its work. He observed, *“Our unity of purpose was just really good all the way through.”* Ted said, *“I*

*guess the most important part of it to me was the way it all played out and how clear it was that all eleven of us came to the same conclusion without any influence from any of the other members of the committee.” Ted described his thoughts when comparing these events to what he believed about search committees and drawing a **lesson** about their particular committee. “[I]t doesn't always work that way. Even when people's intentions are very good. I don't think we're special. I just think that it was a really good group of people on the committee that really listened.”*

Ted made connections between the committee consensus and his prior **frame** of perceptions of the congregation. *“I've always characterized this congregation as being contented without being complacent. The people here have a history of functioning together without major disagreement. I can honestly tell you that in the forty years that I have been here I have never seen a major disagreement in this church. Which is amazing.”* He described how the search experience echoed this perception. *“The way this committee functioned was sort of indicative of how this congregation functions. The community got along great. Everybody was united. Nobody came in with a bone to pick or an agenda.”* His experience reinforced his beliefs about the congregation being a community that gets along and works together without agendas, rather than change that **frame** of beliefs.

On a more spiritual level, he **interpreted** these events as providing **knowledge** about how God works in the world. Ted described discussing these events in spiritual ways during conversations with the other committee members. *“Through this, especially there toward the end, we talked a lot about clarity and discerning God's will. We said ... this trite thing that every pastor search committee everywhere says. ‘We know God's already picked this person out. We've just got to find the person.’ It is trite but it is also very true. We knew that God wasn't going to*

gift wrap this and say, 'Here he is.' Although, it was almost that way." He went on to describe the search process, saying, *"it was one of the clearest times of my life of seeing God's will manifested. There have been some other times in other situations down through the years, but that was a very clear time."* He went on, *"I consider that part of the God work. Where God helps makes things happen. I don't think God ever forces anything, but I think that goes against his nature, the way he chooses to deal with us, but he certainly put those pieces in place."* In both his story about this being one of several events in his life that he **interpreted** as manifestations of God's will and his story about the committee grounding its work in conversations about God already having chosen their next pastor, it is clear that while this was a significant confirming event for his **frame** of beliefs about God, it did not shift that **frame** in significant ways.

Jack: *"The administrative part can just consume a person."* Jack's learning during the transition included learning about how to conduct the search process and the burden of administrative tasks on pastors. Learning **triggers** included church records, other members, participating in the search process, and taking on the administrative needs of the church during the transition. In Jack's case, learning about the administrative burdens on pastors **reframed** his understanding of the work of a pastor and was driving him to call for and **implement** change in how he and the congregation related to their next pastor.

Jack related how the search committee learned to do their work. Jack pointed to information on past searches from church records and other members as a **trigger** for developing the search process, in spite of a lack of records in some areas. *"This church is fast famous for making decisions and policies and never writing anything down. So we're, we're on a mission to document have a church policy and procedure manual before I roll off this year."* He went on, *"Fortunately we had people from past search committees that had kept ... documentation ... Or*

*had lived through the process so we could talk with them.” He pointed to a particular **lesson** learned from the search process, “we spent a long time, we have probably allowed a month too long for advertising.”*

Jack spoke of learning from the **problem** of how to get the work of the church done without a pastor. He related how he and other congregational leaders determined how to fill gaps left after the pastor’s departure. He said first, they worked on “*identifying where the holes were.*” He said their **next step** to solving the problem was finding people to fill those holes. To **implement** this step, Jack himself took on the administration duties at Smalltown Baptist during the pastoral transition, and recalls learning from that experience about the time-consuming nature of these duties. He said, “*Little did I know that part time was a lot more than the 8 hours I volunteered.*” He went on to say that “*administration ... it’s like Pac-Man, the Pac-Man game, it could just chew your time up. I just remember this Pac-Man going around and just eating things.*” He remembered a specific **trigger** for this growing understanding, in how “*probably a couple of months into the process*” the members “*get comfortable with you then they start coming to you with all this stuff.*” He described the **lesson** he learned, saying “*Now the real knowledge for me though, that, that comes out of this is we ask a whole lot of our pastors, at least in our church. ...To me the learning curve is that we expect so much from these people.*”

This learning was significant for Jack because it **reframed** the way he perceived the work of the pastor. This led to his belief in the need for a new dynamic between the congregation and the new pastor. “*We as a congregation have got to step up and relieve some of that pressure off of these people.*” He went on, “*the administrative part can just consume a person. We cannot let that happen, if we expect to have a great preacher and a great pastor. We’ve got to take some of these other roles off of the pastor. I would say that’s been my one greatest learning experience.*”

Jack described how he would incorporate this new insight into his own leadership work in the congregation, *“I just think personally going forward I’m going to do everything I can to help our new pastor.”* Taking on a pastor’s administrative duties during the transition **reframed** his understanding of the administrative demands on the time of a pastor.

Suburban Presbyterian Church: “Try to see God’s purpose for you and your congregation”

Suburban Presbyterian Church sits next door to the courthouse in a former small town that now serves as a suburb to a major city approximately 25 miles away. I was able to interview five members of Suburban during the study. Sue, a retired white woman in her early 60s, has helped in various roles during her membership, and particularly enjoyed helping with the youth. Jerry, a retired black man in his late 50s, was a recent transplant to this suburban city and had found at Suburban a place of welcome and outreach to help with his needs, as well as opportunities for him to be of service. Gregory, Alan, and Jim, all retired white men in their 70s or 80s, have served the church on various councils and committees during their decades-long memberships. Gregory and Jim have recently become very involved with the issue of recent changes in the Presbyterian policies on same sex marriage. Alan served on the search committee in the congregation and had been active in working to create a cohesive church vision over the last few years.

Sue described Suburban as *“a long established church. We’ve celebrated our 150th anniversary in 2010, so now we’re beyond that for almost five years. It’s got a long history and pretty much a rich history, I think. It’s small enough to accommodate the needs of the membership and large enough to address a number of needs of the community. That’s the best part about the church. It’s not too small and it’s not too large. You don’t get lost in the church, so*

to speak. It's a caring congregation. We're very supportive of each other. Most people know everybody else in the church, may not know names, but certainly know faces. It's more in line with the traditional Presbyterian Church than it is the modern, progressive church, you might say."

Jerry called Suburban, *"one of the most giving, caring churches I've ever been associated with. The people are pretty much professional and it's a church whose congregation extends generation to generation to generation. We have married couples in here that's been married 50 years. Not just one or two, a lot. A lot of senior citizens go here and their grandkids go here and their great grandkids go here. It's one of the nicest, healthiest, caringest churches I've ever met."*

Gregory described Suburban as *"a very loving, caring church. You can ask almost anybody who's capable, if they will do [something], and they generally say yes. Because of our small population, our congregation, most everybody ... About 50 of the congregation do most of the work."* He mentioned that *"[t]hose 50 usually have 3 to 5 jobs...so it makes it difficult to make significant changes."*

Alan observed that Suburban *"has a long history going back to 1860 and, as you can see on the wall there, have had a lot of pastors over these years. It, to me, is a loving, caring church. We really think about serving people in need and we have a lot of people in the congregation who are just what I call good people. They want to do things that we think Christ wants us to do...this church is a loving, caring church... Christ to me is the center of this church."*

On visits, I observed that Suburban Presbyterian, in contrast to its neighbors, two red brick church buildings with white columns, is made of grey stone. The front is most notably framed by two notched turrets, one tall and one small, both containing gothic arched windows, flanking an arched center section that rises to a peak. The center section contains red doors and a

round stained glass window above. A brown sign with white lettering out front displays the name of the congregation. Although there is a ramp leading to this entry from the parking areas, aside from the researcher, very few people come and go through the red front doors. Occasionally, children and/or youth would be present out front to hand out bulletins. More often, upon opening the doors to enter, an adult greeter would approach from inside the foyer to the sanctuary.

The red doors lead to a low ceilinged foyer with several doors on various walls. Another set of doors ahead lead to the pale yellow sanctuary with arched stuccoed walls. The side walls are paneled up to a chair rail with dark wood. On each side wall are several stained glass windows, some bearing names in whose honor the windows were donated. Pews are dark wood, and chairs line the walls along the sides in short rows of 2-3 to expand the possible seating. There is an aisle down the center of the pews stretching from the entry doors to a raised front area, paneled with dark wood, that contains a pulpit, an altar, baptismal font, and banners interspersed with chairs and benches against the far wall. An American flag and a Christian flag stand on the far edges of the raised area. To the left of the raised area is a grand piano. Above all this, there is a large cross centered on sets of organ pipes framed by gothic arches. Toward the front of the sanctuary, there are two side doors, and the one to stage right leads to a small hallway. This hallway connects to the fellowship hall and education wing, and is where most people enter the sanctuary. There is a non-enclosed elevator here to assist people with disabilities to enter the sanctuary.

Beyond this hall is a set of stairs leading down to a long corridor of offices and other small rooms. Across from the steps are doors into the attached education building. Grey stone, this is a three story education building with a fellowship hall on the main floor and classrooms in the basement and top floor. This fellowship hall is used for small events and receptions. Past this

building a newer grey stone building is connected through an elevator hallway, and consists of a vaulted multi-purpose space with additional classrooms in its basement. This multi-purpose space is used for Wednesday night meals and a Hispanic church which rents this space to worship on Sundays.

On a typical Sunday, worship consists of announcements, traditional hymns and responsive prayers, scripture, a children's story, a sermon, and a time of offering. 80-100 people are typically in attendance. The announcements at the beginning of the service are made in a casual and light hearted manner, and a chiming of the hour after the announcements marks a turn to a more solemn and liturgical portion of the service containing readings, responsive prayers, and sung responses. Sermons return to a conversational feel, containing jokes and a warm presentation, but do at times contain contemporary and even controversial topics and challenges to the congregation. Hymns are mostly sung with enthusiasm, although occasional hiccups with the accompaniment can confuse people. In the last few services I attended, new songs were taught at the beginning of the service to ease familiarity. During the offering, visitors are asked to record their attendance on notepads in the pews. People disperse quickly after service, unless there is a reception or other special event.

Several special worship services were held during the research period that varied from the typical format. A service honoring grief and loss just before Christmas offered additional quiet reflection and more emotional song lyrics. Two Wednesday night services during lent offered various stations for prayer and spiritual practice. At one of these services, participants were encouraged to drive nails into a loaf of bread to connect with Jesus' death on the cross, or create a prayer bead bracelet, or visit a donkey and a burro to remember these characters from Jesus' procession into Jerusalem, to give a few examples.

Other events I was able to observe included a reception for a departing staff member, several adult discussions on Wednesday nights, and multiple Wednesday night meals. The reception consisted of a short period of mingling and conversation with punch and cookies available. The Wednesday night meals were free and open to all, as advertised on a sandwich board in front of the church. The meal was served in the large multi-purpose space. Food was ample and there was frequently a salad bar and dessert. Over time, I came to recognize that church members, and one gentleman in particular, did the majority of the cooking and cleaning for these events. There would typically be 30-70 adults and children in attendance. Following the Wednesday night meal, there were often adult discussions in the smaller fellowship hall with 10-20 primarily senior citizens in attendance. I attended several, and the discussions consisted of a short talk by the pastor or other speaker, followed by questions and discussions. At all of these events, a warm, friendly welcome was offered by church members.

Suburban communicates in a variety of formats. The church provided documents in the form of emails, committee and session minutes, and emails and bulletins, many of which members cited as sources of information about the church. Jerry said, *“I look at the church bulletin. ...and what they put up on the bulletin board.”* Sue explained, *“We do have bulletins that go out. There are things like e-mail communications. The Representative from the Session who heads the committees will report back to the committees. You know, it's a two-way street. The information goes in both direction. Then if there's a member who wants to bring something before the Session, then they will approach whoever ... Like if it's a children's ministry thing, then they will approach the children's ministry and they in turn will report that and get things approved.”* Jim observed, *“[the interim pastor] has done a good job with his announcements at the beginning of the service, hitting the high points on all the activities, so you're told about it*

there. They're listed in the bulletin, and we have a monthly newsletter..., which goes into more detail about these activities. Then we have the website. We don't have the world's best website as far as being slick-looking, and it needs some help. We talk about getting it redesigned, but it does have all the basic information about the activities. You can bring up a calendar of events and it's all there.”

A Change in Pastors at Suburban: Big changes and big issues.

In late September, 2013, the pastor of Suburban Presbyterian announced his retirement. Members of Suburban describe learning about the pastor leaving through an announcement in church. Sue remembered, *“He made the announcement in church, I think. There was rumor beforehand that he might be. There were some people who maybe knew in advance of the announcement.”*

Pulpit supply pastors were hired to preach until an interim pastor could be located. By November 2013, an interim had been located and begun serving. The interim pastor fulfilled all the duties of a pastor and guided the Session, or governing board of the church, on how to go about a pastor search and what a timeline for a search might look like. During his tenure, the Interim Pastor preached, led staff and lay leader teams and committees, visited members, and was able to lead the church in several small group studies, including one focused on discerning the church’s mission in the community going forward.

A Pastor Nominating Committee was elected in March, 2014. Sue described the work of the church during transition this way, *“The church is given a period in which decide upon the new minister. We decide who is called to the church. Likewise, whoever comes has to feel the calling as well.”* The following May, they completed a ministry information form which would inform prospective pastors about their church and their needs. Over the year and a half that the

committee searched before I concluded this research, they reviewed numerous files and sermons from potential pastors, interviewed several pastor candidates, and offered the pastor position to several candidates, as well as to the interim pastor. When I concluded this research, none of those candidates had accepted the call and the search committee had returned to reviewing information on candidates in order to identify additional prospects.

Due to the length of the transition, the interim pastor's term was extended from its original period of 12 months 3 times, to extend his service through July 2015. However, in May, 2015, the Interim Pastor announced that he had served the term agreed on for his interim along with additional extensions of that time, and needed to leave to take another interim call. His last Sunday was May 21. Pulpit supply pastors were hired to preach for a few weeks, until a new interim began serving the congregation in July 2015. Suburban went through additional staff changes during their pastoral transition. A new children's minister and administrative assistant were hired in late 2014. In April, 2015, the Music Minister announced her retirement effective the end of May.

The church was grappling with the issue of same sex marriage during their transition. The national and state denominational bodies had voted to change their policy on same sex marriage. The interim pastor informed the congregation about the change and how it came about and organized an informational session with a local pastor who had been a voting member of the national body when the decision was made. Several interviewees reported spending extensive time researching and working on their church's response to this change. In the end, the congregation's Session voted, in a close vote, to prevent any same sex marriages from occurring in the church building or on the grounds. In Presbyterian polity, the church cannot forbid a pastor from following their conscience on any matter. However, interviewees who served on the search

committee were clear that they intended to communicate that position to any pastor candidates and that they felt it was important that the new pastor be of the same mind as the congregation regarding this issue.

Stories of the Transition at Suburban.

Suburban members described learning about the structure of the church, the way pastors evaluate potential calls, and about being open to God.

Gregory: “Just working through the process” Gregory’s learning during the transition included learning how to conduct a pastoral search and about the issue of gay marriage in the Presbyterian church. Learning **triggers** included communications from the Presbytery, experiences interviewing, and the PC-USA decision on gay marriage. In Gregory’s case, learning impacted his **next steps**, in interviewing candidates or leading congregational decisions around gay marriage. While it was clear that he viewed the PC-USA decision in a negative light, it did not appear to have changed his **frame** of belief about Presbyterianism as a whole, in that he was still turning to their pastor search process and denominational representatives for information and education.

Gregory spoke of learning to conduct the pastor search through communications from the Presbytery. Gregory noted that this learning was **triggered** by a detailed set of procedures disseminated by the Presbytery. He talked about the process as, *“a whole procedure laid out [by the Presbytery] with a timeline and events you’re supposed to do. Here’s what you do first, here’s what you do second....there are forms to fill out. Ours is called the MIF.”* After receiving the plan, he says *“[The Presbytery] sent down a liaison from the committee on ministry that said, ‘Here’s what you guys are going to be doing,’ and went through, I think there are 7 or 8 steps.”*

He said that as a search committee, he and the others determined their **next steps** by “*just working through the process.*”

Gregory reported learning from working through the process, especially **triggered** by engagement with candidates. He learned about the reasons pastors give for not choosing an offered position. He remembered, “*We actually interviewed two. Both turned us down; their wives turned us down, as a matter of fact. One didn’t want to drive as far as the [colleges in nearby towns].... The other.... turned us down, because they weren’t going to be near [their parents].*”

He learned about how to improve the search committee’s **skills** through talking to candidates, a **lesson** which occurred through trial and error. He recalled, “*we also learned how to sell the church. It was just a few of us...involved in that part of it. What do you do, and what you don’t do in interviews and so on?*” Describing how that **lesson** changed their **next steps**, he explained, “*We don’t tell them what our upper limit of money is.*” He told of their development of **alternative** interviewing techniques out of that **lesson**. “*What you do is, they say what they’re looking for, the minimum they’re looking for, and we say, ‘this is the minimum we’re offering,’ then it’s open to negotiations from that point on.*”

Gregory told of a particular **lesson** learned during the committee’s first interview. “*The first person we interviewed, because we had his PIF, and in it was his statement of faith.... We had this kind of information. After he had gone, we had an exchange of e-mail with him, and.... We got something he didn’t intend for us to get, which was a statement. He was very disappointed that we didn’t ask him about his faith journey. We thought we were pretty satisfied with his faith journey, that we were able to read out of that thing.*” He said that this changed their **next steps** in interviewing other candidates. “*We now ask about faith journeys.*” He told of

another **lesson** learned from reviewing the candidates available. *“We’ve also learned, there are relatively few good speakers out there. That is really kind of surprising, because that’s one of the major functions of the job. The way ... Learning that, to our chagrin, that there are a number of pastors who aren’t as assertive as they need to be, in order to run an organization like a church.”*

Gregory described learning from his work as a lay leader in making congregational decisions around gay marriage, which occurred during the time period of the pastoral transition. He describes the **trigger** for this learning. *“We just recently have been struggling with a resolution to prohibit same-sex marriage in this church, as we are allowed to do by the provisions of the amendment that was passed by the general assembly last year and then ratified by the Presbyterians.”* He talks about how he sought out the **knowledge** to engage this issue. *“I have been deeply involved in doing some research about how that happened at the general assembly, what went on, whether or not the constitution was followed, and it wasn’t.”* He did this research through many denominational channels, *“there are publications [like] the ‘Presbyterian Layman,’ there are publications ... associated with the Presbyterian church that cover both sides. The general assembly has a Web site, our Presbytery’s got a Web site. This information is out there.”*

Gregory outlined how he has **implemented** some possible **solutions**. *“I’ve been speaking. I sent some memos to the session members about that unfortunate process and have spoken to the session about it a couple of times.”* Gregory told of an event specifically focused on educating the congregation about the same-sex marriage issue, *“We’re having a meeting after service next Sunday, in which someone who helped write the amendment that was just voted on, and is now a part of the book of order ... He was on that committee that wrote that sucker. He wasn’t*

necessarily in favor of it, but he helped develop what actually got put on paper to be voted on, is coming here. He used to be an intern here, about 20 years ago. He's going to come and present."

Gregory stated one additional **solution** that they were **implementing**, and the idea for this **solution** relates to his experiences on the search committee, *"We've insisted that session now develop a policy as to what it's going to do, because when we're interviewing people, we want to be able to tell them right up front, 'This is our policy on that. Is that compatible with your beliefs? If it's not, then we're not interested to talk to you.'"* Gregory's learning does not seem to have changed his **frame** of belief on gay marriage or about his congregation, but learning of the denominational changes definitely impacted his choices of **next steps** as a congregational leader.

Alan: *"There are people on our session who saw it differently, which surprised me."*

Alan's learning during the transition included learning about the difficulties of finding a pastor, that there can be diverse ways to worship, and the nuances of understanding and responding to the PC-USA decision on gay marriage. Learning **triggers** included talking to those on the committee, researching and visiting other congregations, observing the impact of the interim pastor, and participating in decision making around gay marriage. In Alan's case, learning mostly added new **knowledge** and understanding, but in the areas of worship styles and gay marriage, did shift his **frames** of understanding to incorporate more diversity than he had previously understood.

Alan described learning that there are not that many candidates that match what the congregation is looking for. Alan said the **trigger** for that learning was talking to people on the committee. He observed, *"everybody's always asking. They know who's on this group, they say what's going on and when are we going to get a pastor."* He reported what he had discovered. *"We're still looking for a pastor. We've been through a long time of looking and trying to find the*

right person. A lot of people applied. A lot of screening has been done. A lot of looking. Still, though, we don't have anyone for one reason or another. Hopefully we will find somebody soon.” Alan pointed to a particularly frustrating piece of information he received, *“we thought we had somebody and then we found out the spouse didn't want to live in this area, so you spend all that time with that person and then find out, well, that's not going to work.”* He named the **lesson** from all this being the difficulty in finding a pastor for their church, in spite of much hard work. *“The point I'm trying to make is that trying to find the right pastor for this congregation obviously is difficult because we have worked at it. These people on this search committee have worked that hard trying to find somebody. They've interviewed a lot of people. They've looked at a lot of resumes, a lot of things, but still no result.”* He had identified a possible **lesson** that transitions might be easier if bound by a shorter time limit. *“I think part of it may be that we need to put a closer time frame. A year, everybody sort of relaxes.”* Thinking toward **solutions**, he said, *“Probably that could be reduced to six months or something. That might be a thing to learn from it, is not have this long transition period.”*

Alan pointed to the challenges of the pastoral transition in his congregation as a **trigger** for learning more about the **problem** of decline in membership at their church and in the Presbyterian Church in general, and acquiring **knowledge** about what could combat that decline. *“It's just not been a good process in my mind. I don't know what the answer is, but I think some of the problem is the church in general, I think, not just Presbyterian, but a lot of churches declining. And you ask yourself why is that, and society is part of it.”* He has pursued more **knowledge** on this subject through reading books and visiting other congregations. He went on to describe his initial theorization around this topic, *“the Presbyterian Church has of course a long, long history and things have changed. Society has changed.”* Alan told of getting a

document that described the changes in the church, *“by the end of 2012 the PCUSA had shrunk by 1.5 million members, down more than 40% of its size in 1983 and more than half of all ...congregations have fewer than 100 members. That sort of shocked me. That's a pretty heavy thing. This was very important to me.”* He related that a group of members took on further investigation on the topic, *“We knew that this church was declining in membership. It was pretty obvious when you looked at the numbers, everything was going down and we thought what do we do? What can we do? There was a small group of us, I think four or five that met to try to figure out what do we do, and one of the thoughts was why don't we visit other churches that seem to be doing better and look at what they're doing.”* They did visit those churches and he reports finding them *“Very different. People worshiped much more casual. People came in shorts. They did communion with someone just called to pick up food to serve. It was very, very relaxed or casual.”* He cites one example of difference in worship that particularly stood out. *“They ha[d] a spread of food and drink and then we sat down to hear the message and...there was another person standing there with a big poster painting a picture with a crayon and I thought, ‘this is really weird’.”* He drew this **lesson** from those experiences, *“The message I thought was very good. To me, it was an example of how you can worship and not be the same.”*

One **lesson** he took from the intersection of his experiences visiting churches and Suburban’s lengthy search process was, *“that ministers that see worship the way we do are not easy to come by. They're very hard to find.”* He went into further detail about the experiences that led him to this conclusion, *“I've worshiped in other churches and I've been to other churches and the worship style is different. They have these big screens. The music is different. Our music is an organ and piano, which I love. I like that, but the bigger church sometimes has a band and the person that's bringing the message is probably in blue jeans or a T-shirt, but usually pretty*

well grounded in what they say.” These experiences did not necessarily **reframe** the whole concept of church for him, but provided more **alternative** ways to think about the problem.

Alan learned from the **trigger** of observing the work of the interim pastor during the transition. He explained his **lesson**, *“The follow through on a lot of these things is where the rubber meets the road so to speak. You can have these great ideas. You can say okay, we’re going to do that. Then, somebody has got to take ownership or leadership of that to make it happen and when you’re transitioning from one pastor to another, they come in with their agenda so to speak and sometimes it just gets so blurred that nothing happens.”* He contrasted that blurred-ness with the experience under their interim pastor. *“[Y]ou’ve got to have someone who can bring a congregation together and we’re doing some of that here in this church right now. The thing with the Family Promise, that’s good. The thing with the food, that’s positive.”* This challenged his **frame** of assumptions about the lack of follow through during pastoral transitions. Only future research examining his expectations of future interim ministers could show whether the experience truly changed that **frame**.

Alan additionally spoke of learning about the same-sex marriage amendment by the PC-USA, which occurred during the same time period as the pastoral transition. The learning was **triggered** by the *“general assembly chang[ing] the wording about marriage in the Book of Order and then [the interim pastor] shared that in a letter with the congregation, an open letter, that the general assembly had voted to change the definition of marriage from one man and one woman to two people and so he said in that letter that he favored same sex marriage.”* The surprise of learning this caused a challenge to his **frame** of belief. *“Some of us when we saw that and thought, ‘how can that be, here’s our pastor saying this,’ so we got involved.”*

Another **trigger** was the report of a fellow member to the leadership body of the church. “[Jim] had done so much research into how this came to be in the Presbyterian church and what he found was revealing. That's to put it mildly. He shared all the research with the session.” He continued, naming other contributors to the learning process, “we were going to have the vote and then somebody said well, we need more time to think about this.” He went on to explain why he advocated for the **solution** of issuing a congregational response to clarify that their church did not agree with the change, “my thought was the general assembly has now said what they think, the Presbytery has said what they said, which both supported. We now have as a local church an opportunity to say what we think about this issue. We didn't bring it up. It was not brought up by this congregation. It was brought up by the general assembly.... We brought it up in the session to look at it and say look, we want people in our area to know that we oppose this.” His feelings on this convey the lack of change in his **frame** of belief about the rightness of same-sex marriage.

Alan recalled another **trigger** of learning in the diversity of views on same-sex marriage from the church's discussion and vote on same-sex marriage, and a straw poll taken during Sunday School. “I remember when we had to vote here on same sex marriage, I thought it would be a slam dunk that everybody on the session would vote against same sex marriage because the scripture to me was so clear, but it didn't. It was five to four. I can't understand that. When I looked at the scripture and marriage being between a man and a woman, I just couldn't grasp how anybody could think that the scripture supported that because the definition of marriage to me is the core of that.” He went on to explain how the vote challenged his **frame** of beliefs about the congregation, “To me it was obvious the scripture said it was between a man and a woman.

Nowhere in the Bible could I find where it says it's between a male and a male and a female and a female. Yet, there are people on our session who saw it differently, which surprised me."

He explained that he had heard very different results from another group within the congregation, *"we have a Sunday School class that meets in this room. It's about twenty to twenty-five people and we just took a straw poll, and they're all older people, to see what they thought about the issue. The vote was, I think, eighteen to nothing."* He contrasted this vote with the one taken by the session. *"So you got one group, an older group, that's like... 'same sex marriage, no way that we can agree with that'. Then you've got some younger people that see it differently and then you have people who have, people who are gay people."* This did cause him to change to his **frame** of understanding that there unanimity on the issue of same-sex marriage in the congregation.

Jim: *"It was almost unbelievable that it was happening."*

Jim's learning during the transition included learning about the search process, how to update the website, and the issue of gay marriage. Learning **triggers** included experiences in leadership and talking to other leaders, volunteer tasks, and reading online. In Jim's case, **lessons** sometimes added to his **skills** and **knowledge**, and in the case of the gay marriage issue, challenged his **frame** of belief around that issue, but did not change any of his **frames**.

Jim told of learning about the search process, **triggered** primarily by reports to committees, *"when I've been in as the member of the session, the process is all discussed in there about how it works and what they do, can't do, how many members are on there, what the mix of the membership is, and what kind of records they're supposed to keep and all that stuff is part of what the session is supposed to know."* He observed something new that he learned from those reports, *"there's one good thing about it now I guess. You can, in this electronic age, you can get*

*into the church's website if you're looking at a minister that you want to get and he sounds like he might be interested, then instead of sending two of the pulpit committee members over to another state to listen to his sermon, you can go to his website.” Jim learned about the status of the transition and other church business from his friends on the session. “I have many good friends on the session. We are in social contact with each other and I learn about it that way. I go to ... a Thursday morning men's Bible study group of about 12-14 men. There's three or four men in that group that are members of the session. Naturally, when we meet... we just talk about things in general before we get started on our lesson.” He points to the length of the transition as a **trigger** for learning. He spoke of the **lesson** to “be patient. It's a process that just takes some time. We've been at it for over a year and a half now.”*

Jim similarly recalled a **lesson** from a previous pastoral transition about open communication. This was **triggered** by a particular incident. “*There was another little issue there, where we got bad advice from the Presbytery about how to handle it. There [were] 12 members of the session. There was about five of us on the session that were in this little clique that knew about this. The leader of this little group had talked to the people at the Presbytery and they said, ‘keep it quiet. Don't spread the word.’ ... Then when it finally came out, and these other six or seven people found out that there was some that knew, but they didn't know, and they weren't told, that was really bad. It was a really bad deal. They really got their feelings hurt, and they thought it was wrong. It was wrong.*” He said they learned a **lesson** from that experience, “*We shouldn't have followed that advice. We should have informed the whole session. If there's a lesson in that anywhere, you don't have little cliques in the session that are keeping secrets from the rest of the session. Everybody needs to be told about everything all the time.*”

Additionally, through volunteering to keep the website up to date, Jim has learned how to do that, **triggered** by attempts resulting in errors. *“The thing that drives you crazy is It's not a what you see is what you get.... It's a trial and error.”* He spoke of the **alternative solution** he devised. *“What I have to do is I have two computer screens, two computers. On this one on my left is the ordinary user would see on our webpage, a list of sermons. The one on my right is where I'm inside of the website and I'm editing that.”* He learned the **lesson** that *“you go back and forth and this ends up looking real neat, which is what people see, and this part I'm editing over here looks like a mess.”* He went onto describe his new **solution**, *“to make these things on the left line up straight so they look neat and orderly, I have to mis-align them over here on where I'm editing.”*

Jim's most extensive story of learning related to the PC-USA changes in their policies on gay marriage. He says that this was **triggered** when he read something online that *“talked about this authoritative interpretation that was passed along with the amendment at the last general assembly meeting. That just raised my curiosity. What is an authoritative interpretation? What does it do?”* He told of searching for more **knowledge** on the subject. *“I just started digging into the internet, into the PCUSA website, has a lot of information.”* He looked at another source *“called The Outlook. They have a lot of information about it.”* He described the experience of clicking on links to learn more. *“[You] just kind of go from one to the other and they lead to different places. It's mainly straight out of the book of order itself and then from the PCUSA website because it just goes on and on.... It's got all kinds of internal links to all kind of documents and statistics and you can spend all day long exploring that thing.... I never had really dug into it like I did now.”*

He reports the **lesson** he learned. *“The authoritative interpretation was probably the most significant thing that was kind of a shock. I didn’t know what authoritative interpretation was. Never heard of one. It’s not used that much. It’s kind of rare that they use, but it always has been used for the purpose that the book of order says it should be used, until this last time. Then all of a sudden we’re doing something else with it. When I saw that, I said, ‘Wow. How can they do this? What’s going on here?’”* He wrote a number of memos to the congregation outlining how these decisions countered Presbyterian order and Biblical truth. This was a profound challenge to his **frame** of understanding of theological truth and Presbyterian polity. *“To me, it was almost unbelievable that it was happening.”* Yet his memos made it clear that his **frame** did not change, as they asserted the need to oppose the national decision.

Sue: *“When you’re looking at it from a slightly different angle, you see things entirely differently.”*

Sue learned during the transition about the search process, the nature of calling, and staying open to God. Learning **triggers** included talking to other members, announcements such as the interim not staying on as pastor, and working with youth. For Sue, **lessons** sometimes added to her **knowledge**, and reinforced her **frames** of understanding search, calling, and openness to God.

Sue told of learning throughout the transition process. She described her **frame** of understanding of the work of the church during transition this way, *“You have a period in which somebody fills in that gap, while you’re trying to sort through who the church feels is called, and who in turn feels the calling from God to come to the church.”* Sue said, *“when there’s a serious contender, they are brought to the church to give a sermon.... I mean, there are a lot of people we don’t get to hear, because it never reaches that level. Once it reaches a certain level, if a*

*serious offer is being considered, then we get to hear the person, if we're here that Sunday.” Sue pointed to one **lesson triggered** by that variety in preachers, “I’ve learned that different people have different styles of the way they approach the Gospel, the way they deliver the message of the Gospel.” She observed, “they’ve all had a slightly different take on certain things.”*

During this transition, Sue learned that pastors have to consider their own calling before taking a job. This was **triggered** by the decision of the interim pastor not to stay on as permanent when offered the job. “[Our interim pastor] has pretty much been a constant over the period he’s been here.” She went on, “Everybody really liked him. They liked his style. He got along well with everybody. He seemed to be competent in his job.” Sue said, “I think everybody was kind of disappointed that he didn’t decide to stay full time.” She remembered that, “he did announce up-front that he felt his calling was to the interim pastorship.” Sue drew on that and his decision not to stay to reinforce a **frame** of belief that “if that is truly his calling, he’s doing the right thing by not staying with us, I suppose.... Everybody would have been happy for him to stay, but if that’s not his calling, then it’s for us to find who is called.”

Sue described learning some of the reasons for the long interim period. She pointed to talking to people on the committee as a **trigger** for that learning, “I happen to know people who are on that committee, the Search Committee, so every so often I ask, ‘How’s it going?’ I’ll get a little feedback. I don’t know that everybody gets that feedback.” She relayed hearing from them, “We think we’re making progress and then I think we find out we’ve not made as much progress as we thought. I know there have been several potential people that the Committee was really excited about. Then things fell through.... I do know there’s some issues. People in the age group who would be looking for this type of position have children. They’re looking at school systems. They’re looking at the community.” Sue drew on her memories of past transitions and

interpreted that the church could be over-cautious about selecting a pastor. She observed, *“that may be one reason we're having so much difficulty now in settling on one person, because we don't want to go through the **same** experience we've had with the person who ended up as a mismatch.”* She summed up her **interpretation** of all this, connecting it back to the **frame** of calling. *“It's a two-way street and both we have to feel the call as well as the person needs to feel the calling to come, when that doesn't quite jive, then you have to keep looking.”*

Sue communicated this **lesson** drawn from her experience of the transition: *“Just to be open. You have to be open, not only to other people, but to be open to what God's will is for the church.”* She said of the **trigger** for this learning, *“I've found that when you think you have things figured out the way you think they should be, sometimes things get twisted a little bit, and when you're looking at it from a slightly different angle, you see things entirely differently.”* Sue additionally attributed her learning about openness to God to her work with youth. She said, *“Their view of things are so entirely different from an adult's point of view. They're so much fresher, and spontaneous, and maybe receptive to things we get jaded about later on.”* She highlighted the importance of openness to be able to receive future learning. *“Unless you're open, you're going to be shut out of a lot of messages that could impact how you, not only perceive things, but how you interact with the world.”* Her advice to churches going through transition connects to this **lesson** on openness, *“Just to approach it in a prayerful way. That's part of becoming open, because it helps you get outside of yourself, to try to see what God's purpose for you and your congregation are. If you're too narrow, you're never going to get to the point where you can see that.”*

Jerry: *“They explained to me the way it works with the Presbyterians.”* Jerry's learning during the transition included learning about polity at Suburban and in the Presbyterian Church –

USA, about scholarly perspectives on the Bible and its times, and about topical issues. Learning **triggers** included conversations and curriculum in his Sunday School class. In Jerry's case, learning was shaping his **frames** of belief about the church, its denomination, and the Bible, his faith, and in one case **reframing** the way he had **interpreted** a movie based on a Biblical text.

Jerry recalled learning about Presbyterian church polity through his participation in a Sunday School class. Jerry said that conversations in the class were a **trigger** for that learning. *"I've been discussing that in a shadow way with the guys because there have been issues that have come up. In the Sunday school class that I'm in...they discuss structure on a regular basis because they are very much into the administration. Issues that come up that go before the Presbyterian board, the decisions that have to be made."* He said that these conversations have shaped his **frame** of belief about Presbyterianism and about Suburban. *"I'm impressed with these. ...I'm impressed with the structure and organization and the closeness these guys are to keeping a check on how their church is run, who uses it."* He talks of his surprise at the **knowledge** that the interim pastor would not be permanent and why. *"[T]hey're always discussing that. [The interim pastor] is phenomenal. I'm just surprised that he's not... permanent, but after they explained to me the way it works with the Presbyterians, he has to be voted in."* This shaped his **frame** of understanding that *"They have their things that they have to go through, the steps that have to be taken."*

Jerry mentioned that his experiences at the church have reinforced and aided his faith. *"Just pretty much the love, just the love. I'd always loved Jesus. That was not a issue.... I learned how to not fall back with doubt no matter how tragic things are because when I came here, I was in a tragic frame of mind. They helped bring my faith back up just by them being themselves. They didn't work on me, they just simply believed in the same. They just helped me renew my*

beliefs by me watching how they believe and practice their beliefs.... there's not too much else to learn other than love.” This story illustrates a change in his **frame** of mind, from tragic to renewed, while showing a reinforcement of his **frame** of belief about the centrality of love.

Jerry told of other learning from his Sunday School class at Suburban. He said that the curriculum was the **trigger** for that learning. *“Right now, we have lessons on all the DVDs about the structure of Israel back in the BC days Before Christ. It's a professor from a university that we're watching on the DVD and it's almost like being in a lecture class in college where you take the notes. It's so informational. It's giving you information about their water flow system, about how they handle sanitary conditions back then, the structure of Israel and Galilee and Mesopotamia.”* He reported this **lesson** had changed his **frame** of thinking about the Bible stories, saying *“I'll never look at the movie Moses the same way again.”* He went on to outline additional topics of **lessons** he was learning, and how. *“Other times, we'll just simply take passages from the Bible and we'll read them and then critique them. Other times...a particular issue, like right now we have a[n] issue in the church about... same-sex marriage.”*

Urban Congregational Church: “People ...do what needs to be done to make it survive.”

Urban Congregational Church is on a major highway on the outskirts of a metro core. While not inside the main city, it is in an unincorporated area that is generally considered part of “Intown,” because it is inside a highway that encircles the city. I interviewed six members of Urban in the course of the study. Sarah, an older white woman in her 70s and Urban member for several decades, serves in a lay minister role at Urban, helping with pastoral care and worship. Mark, a young black man in his early 30s, had attended seminary and had been seeking his first pastorate while serving in various capacities, first in the small church that was merging with Urban and now at Urban. Frank, a white man in later middle age, was a member of the small

church that was in the process of merging with Urban. Allyson, a white woman in her late 30s, had served in various roles on Urban's governing board over the last few years. Gail, a young black woman in her late 20s, had recently become more involved at Urban and currently serves on at least one team dealing with planning for the future of the church. Wendy, a young Asian woman in her 20s, was a fairly new member of Urban and participated primarily in worship and social events.

Allyson described Urban this way: *"It's small because we originally started as the MCC. It's mostly a lesbian congregation, a small, gay group of men and then a few straight people, a few families. I'd say that's the demographic of the church. It's a very close-knit group. Even when new people come in, it doesn't take that long before they're part of the family.... Even in churches where I would say they are very progressive...you had to abide by those rules.... There's always that little bit of, 'We're at church. We can't say this. We can't do this.' You just don't get that [at Urban]. ... People are just who they are."*

Wendy said of Urban, *"they're so welcoming there. It's not shove it down your throat religion, beliefs and everything. They're so understanding. ...That's what I like about it. ...It's not always traditional setting for a church, so I feel comfortable there, I don't feel intimidated. ...They're very accommodating in the sense of inclusive, trying to include all people."*

Gail said Urban is, *"an inclusive place as far as the people who are there ...There's not much diversity but at the same time they're open to it. It just feels welcoming and it's a place where they're Catholics or people who aren't quite sure where they stand as far as spirituality and religion goes or whether or not they're spiritual but not religious...it's this place where*

things can evolve. It's open to questions and respecting, I think, everyone's different point of view and trying to offer a different experience to kind of serve everyone."

Sarah described Urban as "Progressive, definitely progressive. ...It's a real blend of people from people who are both theologically... conservative, and positive to people who are known in the community as activists, LGBT activists, and they tend to be more liberal in their theology. Then, we have a heritage, a history of inclusive language.... I think that at this time, we're a blend. I think we have moved from the survival mode to now, how do we get this thing going I believe we are a small church. In some respects, we look like a storefront but we really aren't.... There's a spirit of let's do this together, let's make it happen."

On visits, I observed that the church is located in its own building, which is single-story, constructed of stucco and concrete block, resembling a store or office building. There is a lighted sign out front elevated on a pole, similar to nearby business signage. The five lane highway that it fronts takes drivers from the Downtown area out to the encircling highway and beyond to additional suburbs and exurbs. Near the church are a CVS pharmacy, several convenience stores, a liquor store, a vet, some auto mechanics, and several low rise office buildings and apartment complexes.

Upon entering the clear glass front doors flanked by two full height clear windows, a station of candles is off to the left, and a solid wall covers part of the room directly in front of the entrance. On this wall is an assemblage of cloth and items appearing as an altar of sorts, as well as a cross. To the right of this wall is a lectern containing bulletins, and often an usher is standing nearby to hand them out as you walk in. As you enter the space on the other side of the dividing wall, to the rear is an elevated audio-visual workspace, and rows of chairs on the diagonal divided by a center aisle face a raised front area. The raised area is flanked by an organ on the

left and piano on the right. On the raised area is a pulpit to the left, an altar in the center, a lectern on the right, and chairs lining the back and clustered to the right. Overhead on the left is a multimedia screen. At the far wall behind the raised area, the wall is covered with shimmering cloth and multiple banners expressing the religious season.

A church visitor is usually greeted inside the doors by a member with a bulletin. Small groups of members are often gathered in conversation in the time before worship. Children, though only 2-3 are occasionally in attendance, are present for the entire service. Weekly Sunday worship consists of readings, songs, prayers, a sermon, and communion. A somewhat liturgical style and adherence to the lectionary texts is blended with some music in a more contemporary style. The use of a screen projecting images and lyrics adds a contemporary touch. Most music is accompanied by piano, with occasional use of guitar and, very rarely, the organ. Readers appear to include both clergy and laity, as do communion servers. Readings are done from the lectern on the platform, or occasionally the lectern and the pulpit, if there are two readers. The sermon is preached from the pulpit. Communion is given by 5 servers on the floor in front of the platform. Four servers are in groups of two, and each group has one server with the bread and another with wine. Those receiving communion from these pairs are given bread to dip in the wine, or bread is placed in their mouths and they are given the cup to sip from. They are then gathered into an embrace by the pair and are prayed for by the clergy member of the pair. The fifth server has a platter of wafers and a cup of wine. Those receiving communion from the fifth server simply dip a wafer into the wine and return to their seats. After worship, members visit with one another, primarily in the worship area, although coffee and refreshments are available in the social hall.

Other events I attended included congregational forums, a social event and a celebration. Congregational forums were typically led by members of the governing board. Reports were

presented on the finances or other matters of the congregation. Congregation members were allowed to ask questions of the board members or supply their perspectives on issues under discussion. Votes were sometimes taken on matters that required congregational approval, but these were few. The social event was held at a local restaurant, and involved sharing a meal and conversation. Conversation at the social event was jovial and light-hearted, even at times bawdy. Occasionally, conversation turned to more serious matters like those in the congregation in need of prayer or healing. The celebration took place after the Supreme Court ruling on same sex marriage and was held in the social hall. Refreshments were offered and members gathered for conversation and several rounds of applause to celebrate what this decision would mean for those in the congregation. Members shared their reflections on what this change would mean for their lives, with many announcing upcoming wedding plans.

Urban is in the process of merging with another small congregation that began as a church plant a few years ago. During this research, some members of this small congregation attended worship at Urban, the leaders of the small congregation took part in leading worship and other events, and meetings were underway to discern how the congregations might become one.

Communications at Urban consisted of announcements, email newsletters, word of mouth, and web/Facebook pages. I gathered several examples of the email newsletter as documents and observed the announcements during visits, and members mentioned these and others in their interviews. Gail pointed to emails and phone calls from Urban Congregational and its members as a frequent source of information, *“I think it's just them communicating, mostly after church, [during] the service ...or through email or if they have your number then they'll call you and want to have a conversation about it.... there's a lot of communication that goes on*

and easy to find out if you... engage.” Fellow member Frank reported engaging with the church online, *“Online, because I do like the idea that you can give online, and then you can also watch online. I’ve watched online a couple of times when I couldn’t be there, while we’re out of town.”* Likewise, Allyson talked about learning of events through a church newsletter, *“We have ‘The Chimes,’ the church newsletter that goes out once a week that lists any upcoming activities. ... or announcements at church.”* Wendy mentioned, *“A lot of us are on Facebook, so something like that, in addition to the weekly announcements. There are invitations sent out. ...By social media, word of mouth.”* She said that is the main way events are publicized, *“It’s pretty cool, because we’ll post pictures, and then we’ll [be] like, ‘Hey, it’s a monthly thing.’”*

A Change in Pastors at Urban: From Departure to Merger

In late October, 2014, the pastor of Urban announced that she would be leaving as of the end of the year. A meeting followed worship to allow members to ask questions and discuss. Members remember when the pastor’s departure was announced. Sarah recalled, *“someone on the board said I want you to be prepared. She is going to resign. The board got notice on Friday night at 10:30. They were in session all day on Saturday and she announced her leaving on Sunday.”* Gail remembered the day she learned the pastor was leaving, *“It was at church and she announced it...and then they took questions and stuff, opened it up for people who had questions. [The pastor] left because she wanted people to be open and ask what they wanted and say what they wanted and so she decided to go to let that happen....[They asked questions like] Why? What’s going to happen? Who? Are we going to hire another pastor? How long? ... Are we going to continue having church on Sundays? You know, service, are we going to continue having church on Sunday? Service, is it going to stop? ... a lot of people were upset, crying.”* Wendy remembered, *“I don’t know the politics truly behind it, but I know that [the pastor who*

was leaving] had said, 'Hey, I want to let you guys know that I've got this opportunity in Tennessee. It's my calling, I need to do it.' ...In my opinion, I was like, 'Okay, may the force be with you.' I looked to my left, and all of a sudden people were in tears.'"

In early November, the church held a meeting after worship to discuss the future of the church. From there, those members involved in the governing board had to determine the **next steps** after the pastor's departure. Allyson described that they explored their options for hiring a new pastor, "*if we [weren't going to use existing staff], before we made that decision.*" The governing board decided that since the pastor would already be absent through October for a trip abroad that had been scheduled for months, allowing her to return for a few weeks later in the year to serve as pastor until she moved away would be more distracting than helpful. The church held a Farewell Service for the pastor in late November and utilized existing staff and guest preachers through the beginning of the year.

In late January, 2015, the governing board held a congregational forum to discuss the budget and other issues facing the church. In March, the congregation decided to move the former staff responsible for worship and administration into a licensed minister position, and arranged to have her alternate preaching with one of the leaders of the other small church, utilizing other lay and ordained members and leaders to help with worship and other programs. In May, 2015, the licensed minister was formally installed by the congregation during a special worship service.

During early 2015, another congregation, New Way Church, had begun discussing the possibility of consolidating with Urban. This congregation was small and young, and had been led by two planting pastors and a group of lay and ordained volunteer leaders. Mark described New Way as, "*a funky, granola, congregation. Eclectic, contemporary worship, great music. We*

ha[d] this live jazz band with this R&B, jazz flavored pianist and drums and Led Zeppelin-like guitar player and it's just really soulful and funky and fresh and new. With the merge [with Urban], it's a fusion of a very, I wouldn't say high liturgical but more traditional church with the funky, fresh, eclectic bunch.” After years of meeting in various locations around the city, New Way had discerned the possibility of joining with a settled congregation and approached Urban about that possibility. Members of this small congregation were attending Urban during the research period, and a Consolidation Committee had been formed to formalize this relationship. This process was nearing completion when I concluded research at Urban.

Toward the end of this research, Urban began another staff transition when their long time accompanist announced his departure due to a partner’s job transfer. They had not begun working to fill this position when I concluded this study.

Stories of the transition at Urban.

During the transition, Urban members reported learning about navigating the shifts of identity that come with changes in pastors and church mergers, about how dynamics in the congregation can be revealed during times of transition, and the level of commitment members had to the future of the congregation.

Sarah: *“There was a group of people that will refuse to let this church die.”* Sarah’s learning during the transition included learning about the transition and the congregation. Learning **triggers** included talking to members, and serving and working in the congregation. In Sarah’s case, learning did not transform her **frames** of reference, and even those experiences that seemed to counter those **frames**, were merely seen as a midpoint on the way to a more confirming future.

Sarah learned about the transition by talking to other members. According to Sarah, this learning was initially **triggered** when she heard by phone call from another member that the pastor was leaving. She took steps to respond to that new information, *“I spoke individually, not at a board meeting or anything but I spoke individually to the members of the board saying, if you keep her through Advent, you would lose even more people.”*

Sarah described learning through her experience of seeing people with very different views or opinions of each other participate together in worship and work. Sarah pointed to her experiences in lay leadership as **triggers** for this learning. *“I’ve seen people who don’t like each other work together in order to preserve the church and things like that.”* She recalled a growing awareness coming from what she witnessed in worship. *“I was more aware of people like [one church] family who are old fundamentalist types, that it included them and that they didn’t have to believe the same as us, and that they were moved to tears by the whole experience.”* She identified her growing understanding from these experiences, *“very, very meaningful to me is that the progressive way is inclusive. You get to be different from me. You don’t have to believe exactly what I believe.”*

Sarah spoke of learning from the **opportunity** to merge the two congregations. She remembered this experience beginning when, *“[New Way] needed a place to be, and they had sought to be with or use the property.... [Our licensed minister] really had the idea when she talked to [one of their leaders] that it might be a good thing for us to just worship together rather than try to be two different separate things.”* She explains that *“we didn’t really want it to be a merger. We wanted it to be a blend of both congregations.”* In reviewing the experience so far, she said, *“I think that we’ve done that pretty well.”* She said that she believed this *“because we brought in elements of things that they did in their worship into our worship.”* Sarah observed

that the complete blending of the congregations was taking time. She pointed to her observations during worship and other events as a **trigger** for that understanding. *“There’s still work to be done, because they still sit with each other, and there’s only a beginning of them coming to our social events.”* In this experience, Sarah is drawing on her **frame** of how she believed Urban wanted the merger to go, comparing her experiences with that **frame**, and finding in some ways her experiences reinforce that **frame** while in others they counter it. However, even in her telling of the frame-countering fact that people are not sitting and socializing together yet, the **frame** remains in her faith that they will get to the goal of full blending, but that there is still work to be done.

Some of Sarah’s stories predate the pastoral transition. She described a time when she learned that people and leaders in the church did not step up to support a ministry of the church. She said this was triggered by a lack of support for *“the afterschool program out at Decatur... I felt that was a meaningful ministry that we’re doing. ...it just got more and more convoluted and pretty much shafted.”* She went on to say that eventually, *“they left me there by myself with 18 kids. Every one of those kids would have qualified for severely emotionally disturbed kids. They didn’t give me help, wouldn’t give me help. I made a huge hissy fit to [the pastor]. She came down and she not only wasn’t helpful, she actually needed me to get things for her the whole time she was there. You can’t be queen when you need workers.”* She **interpreted** this experience as saying about the church, *“We like having the publicity of saying what we’re doing but we didn’t really want to do it. There was no ...expecting working people to be able to do that. They couldn’t even get there in time. Just a whole lot of things that the pieces weren’t together. The ministry, I think, was started from a good heart rather than a real plan.”* This experience profoundly impacted her relationship with the church, and she described her *“personal*

depression and frustration over not knowing how to get over it. I couldn't function anymore.... I just went down the tubes." She recalled that before the pastoral transition "*I thought we were going to go down ... and I knew that as long as we kept [the previous pastor] we would be not only stagnating but we would be diminishing."*

Sarah remembered a time after the transition when she learned that people were willing to work hard to save the church. She points to an experience during a busy Holy week as the **trigger** for that learning. "*[Staff members] and I were really busy, and we poured our whole heart in making it happen and making that happen right and beautifully, but other people...*" She reported having doubts that they would be able to do all the work. "*I was thinking on Maundy Thursday, I thought, how are we going to get all this stuff ready for the next night which is a whole different setting, right?"* She went on, "*We had Stations of the Cross. We had put the vaulted lights which is a very heavy huge stand up in the front for people to light and say a prayer as part of the Good Friday service. I thought, just in the back of my mind said, 'That's got to be moving. That sucker is really heavy.'*" She told of her surprise when, "*I turned around and it was moved. Somebody had just taken care of it and I saw people just doing those things."* She points to this moment as a **lesson** about the willingness of the congregation to do the work needed to survive the transition, saying, "*I knew. I saw pieces of it but it was like that was a symbol to me of how we are a family together. That wasn't a board member or a choir member."* She identifies her **lesson** learned as, "*that there was a group of people that will refuse to let this church die. That's what I learned. It's that there are people that want to be a church and that they're willing to do what needs to be done to make it survive."* While this didn't transform her previous **frame** of beliefs about the church, it did challenge her preexisting pessimism and concern about the church's survival.

Mark: *“They went with it and had faith in me.”* Mark’s learning during the transition included learning about attitudes toward change and the need to change his willingness to overfunction in service to the congregation. Learning **triggers** included his encounters and exchanges with others in the congregation. In Mark’s case, his learning stories included more about his inner work of examining **alternatives** and testing **solutions** than any other participant. His stories did not demonstrate **reframing** of the **context**, but using his **lessons** learned to discern best **next steps** and future actions.

Mark remembered learning about the attitudes of congregational leaders toward change. He pointed to an experience helping with worship during the merger and pastoral transition period as the **trigger** for this learning. Mark stated, *“I was doing worship. I was going to preach that Sunday, I had everything kind of honed out. I also was talking to a board member, ...and they were very clear that things had been always done a specific way.”* He began to **interpret** this through the **frame** of his experience in social work, *“I think the average bear went in and got really defensive. ...In that moment my clinician hat just kind of, this person's really scared and they really need me to reassure them that a different way is okay.”* He described the experience of determining a possible **solution** and **implementing** that. *“I just had to really step outside of myself and just kind of say you know, I really get this change is not easy for you and that having new people in this space is something that you want, but doing things differently because people are in this space, it can be uncomfortable for some. I need you to trust me enough to let me try this and know that everything will be okay.”* He observed how things progressed from there, *“They had their judgments and their opinions, impressions about the way they wanted it but you know, they went with it and had faith in me.”* He told of his **frame** of belief about the necessity of faith, to leave room for God in the process. *“I think people get so*

fixated, myself included, on things being a certain way. There's no room for the Holy Spirit to come in and do what needs to be done. How can God really take hold of this space and the dam breaks and people come in and be their authentic selves and embrace their gifts and vitality really happen if you're so fixated on things being a certain way?" He did not say that this experience directly formed this **frame** of belief, but both contain language about trust and openness countering fixation and rigidity.

Mark recalled learning, as the church plant was nearing the time of needing to change their situation, about the need to set boundaries when participating in community life. Mark described the trigger for this learning, *"we would have community meals. Every time we had a community meal I would send out an email and I would organize who was bringing what and ... I would make something that would feed and make enough of it to feed the entire congregation.... Things that would just fill you up and loosen your inhibitions and make you want to break bread and connect.... After the meal was over ... I would clear the table, I'd gather people's dishes while they talked and I would put them in the dishwasher and I would wash them, all the dishes. Then I would pack up all the dishes and do all the tables. I'd do all that by myself."* He believed that this was crucial to the health of the community. *"I thought that was my ministry ... radical hospitality to the church. I just think there's something theological about breaking bread."* He observed that *"people weren't feeling the need to engage, to take ownership. They just saw themselves there to consume."* He **interpreted** this situation, *"For this to shift, ... for the congregation to grow and to stand, I had to really change the way I did things."* He described his **next steps**, *"and so one Sunday I brought the food, I set it up and then I left."* He went on to outline the **lesson** he learned, *"I found that was the only way I could really get people to take ownership and engage and get things done. When I kept being met with*

resistance, nobody wanted to bring food, but everybody wanted to eat food. Everybody wanted to be fed.... There were certain Sundays where I would do my part and I would have to say 'you know what, I've been here for two hours or more, I'm going home now. You guys figure this out. You guys are responsible for the space. We're a community.'" Mark outlined further experiences that shaped his learning. *"Even after we started to begin the merge, people were still expecting me to show up in that role and to care for them instead of caring with them."* But he is clear that he has stuck to his new **frame** of understanding that it was best for the congregation to encourage ownership among others, telling of persisting in spite of some negative **consequences**, *"there are people who don't talk to me anymore, who are angry because I have redefined what I'm available for."*

Allyson: *"I've had to figure out how to do that"* Allyson's learning during the transition included learning about how to perform various tasks and responsibilities in her lay leadership roles. Learning **triggers** included new situations which required decisions or actions. In Allyson's case, her learning stories primarily focused on acquiring new **knowledge** and **skills**, then **implementing** those in her life or work in lay leadership, without significant change in her **frames** of belief. Her story about the congregations learning to merge with each other did demonstrate some **reframing** of the **context**, but on an organizational rather than individual level.

Allyson described learning how the church lay leaders and staff should move forward after the pastor's departure, which served as a **trigger** of learning. Allyson named several ways that they examined alternative **solutions** for the church's **next steps**, most of which involved gaining **knowledge** from others about options, "most of it probably actually was working with the conference minister on what the next step was going to be." She mentioned, "[Existing staff

said], *'Here's what I'll have to do,'*” in terms of outlining their potential **solutions** for filling the gaps. She named another source of **knowledge** informing their decision-making. *“There was also a person in the congregation who's got a lot of experience with church transitions and that type of thing. ... he was giving some input.”*

Allyson remembered one particular decision in detail, and the thought processes behind it. *“We chose to not have [the outgoing pastor] serve out her two months.... She gave us the two months notice. We just went ahead and paid her out for that two months and didn't have her. We had her come back for 1 service where everybody could say goodbye and bring closure to it.”* She says that the **problem** necessitating that decision was that *“the Sunday that she resigned, she was leaving either that day or the next day to go [abroad] for two weeks. Then she was going to be away for professional development for another week. For the first three weeks of that two months and then we were going to hit Advent.”* She names how they considered their **next steps**, discussing that *“We didn't want to have Advent being, "This one is going away. This is really sad. Given that she was already not going to be there basically for 3 weeks.”* She and the other lay leaders **implemented a solution** when they *“held a Farewell Service for the pastor in late November and utilized existing staff and guest preachers through the beginning of the year.”* Looking back at that decision, she said, *“It just made sense.”* Whether this **lesson** could be carried forward into other situations, due to the uniqueness of the pastor’s departure circumstances, is unclear.

Allyson recalled how the leaders navigated the potential merger with another congregation. The **opportunity** presented itself when *“one of the co-pastors at [New Way], one of the founding people of the church... came and hung out with us. ... It was just him and a handful of us. ... He just talked to some of us.”* She said that the leaders then *“just invited them to*

*attend church.” She went on to describe how all parties gained the **knowledge** they needed and developed the relationships needed to move forward, “[New Way and Urban clergy] had been meeting and talking about things. I think [they] also talked with one of our lay leaders a little bit about finances. Some of it was a formal meeting, their leadership. Mostly it was meeting with our board or meeting with our staff.” Once these meetings had taken place, Urban **tested** the potential of the relationship. “Then we had their members come worship with us to introduce them and see if their style of worship might work with our style of worship ... We do tend to do the same thing every Sunday, much more structured, less interactive than what they were doing.” Allyson described the outcome of this combined worship. “They came. We liked them. They liked us. They decided they wanted to join with us.” She related how they decided to go forward, avoiding the term merger to better capture their growing integration. “We’ve actually gone with the term consolidation.” This process of consolidation was nearing completion when I concluded research at Urban. Allyson outlined how they **acquired required knowledge** and moved toward **implementation**. “[The consolidation team] were basically going to go through our by-laws, standard operating procedures and any documents that they had for their structure and basically come up with a consolidated document that would represent both [congregations]. They were hoping to get that all worked out in one meeting. Then we’ll present it to the congregation. We’ll have a congregational meeting in the fall.”*

This learning story was focused less individually than organizationally. But there were clear instances of an **opportunity**, of **examining alternatives**, of **acquiring** needed **knowledge** and information, of **implementing solutions**, of **assessing** the progress, and of moving into further **next steps**. This process even demonstrated some verbal **reframing** of the **context** in the move from the term “merger” to the term “consolidation.”

Allyson described learning to be the clerk of the board through her prior experience and feedback on that work. *“I’d been a clerk once before at a different church. It was a Baptist church. I knew how they’d done it. They’d told me how they’d done it before, which they actually wrote down. It was basically a transcription of the meeting.”* She remembered experiencing a **trigger** for learning new ways at the beginning of her term as clerk at Urban. *“I started that and then was told that’s not the way they did it.”* She gained the skill needed to do it the Urban way when *“the previous clerk, one of the associate ministers and one of the other board members took minutes and sent them out. They said, ‘You don’t need to do the transcription. We just want you to do this.’* It was pretty informal. *“The clerk said. ‘Here’s my template. Here’s how I did it. Here’s an example.’ There was no formal training.”* Then she describes integrating that **lesson** into her current method of record-keeping. *“You just put your own flair on it and did it the way I wanted to do it.”*

Allyson additionally recalled learning through doing other tasks for the board that she had never done before. One **trigger** for learning was that *“we’re getting ready to try and do an installation service for our new minister.”* She described seeking **knowledge** that will help her do that work. *“I’ve had to figure out how to do that, who to contact.”* She told a funny story about learning some church jargon through a misunderstanding, pointing to that time as the **trigger** for learning. *“The person that knows the Roberts Rules, when I first heard them saying he knew them very well, I’m like, ‘Robert has a list of rules?’ It’s just a coincidence that Robert happens to have the same name.”*

Allyson mentioned learning more about how the church makes decisions from her work on the church board. She remembers the **frame** of understanding she had before being a board member, *“I didn’t know how [decisions] were made. I assumed it was either the staff, the board*

or a combination of the two but I didn't know what was going on.... I ... rarely knew anything that wasn't being formally told to the church either through announcements or meetings, congregational meetings, that type of thing.... Then major decisions would come before the congregation for a vote but the congregation would tend to go along with whatever was recommended.” She described her new understanding that *“anybody can put an agenda item on for the board meeting. Then at the meetings we just go down the agenda and talk about the items. We discuss it as a group. At some point, somebody will put forward a motion. Usually by the time we put it to a motion, we've come to an agreement. Then we just vote on it.”* This changed her **frame** of understanding decision-making in the church. Allyson was already considering how to acquire the **knowledge and skills** for her new role as moderator. *“One, I will do [an online] class. Two, [a past moderator] is very much one of those knows all of the rules and Robert's Rules and knows exactly how everything is supposed to work.”*

Allyson related one other source of her learning at Urban, *“we're doing a small group. We had one in the past with the previous minister. Then we just started one this past Thursday night. Some of the people I know from the small group are some of them I know from choir practice and talking. With a small group, of course, you get to know people better because it's a lot more in-depth discussion and gets really personal.”* These experiences add **knowledge** about the members of the small group. She remembered one small group experience where the group talked *“about how do we define faith? Who do we say God is? I think that helped me be able to actually answer [that] question better. I really had to sit and think about it. That helped. I wouldn't say it changed what I was believing. It just helped me be able to formulate it a little bit better.”* This experience did not cause **reframing** of her beliefs, but helped her articulate an existing **frame**.

Gail: *“I learned that there were a lot of tensions that I didn't even know were there.”*

Gail’s learning during the transition included learning about the congregation and its members, about the faith of those in the church, and about her own faith. Learning **triggers** included the conversations of members at congregational gatherings, a time of sharing stories in worship, and a felt need for more **knowledge** about religion. In Gail’s case, her learning did significantly **reframe** her understanding of the congregation and the tensions that existed under the surface. This gave her ongoing concern that the congregation avoid similar unspoken tensions in the future. Yet at the time of our interview, she did not report **planning or implementing any solutions** toward that end.

Gail remembered learning from meetings where the congregation explored its future identity during the period following the pastor’s departure when it was considering a merger with another small congregation. Gail said, *“Initially we had what they call vision meetings. We had about two of those where it was open to everyone and that was the beginning when we were trying to figure out what the community would be like with [New Way].... this was the opportunity for something new to happen.... I think I may have attended one of the board meetings that was open to everyone.... They started talking about it then and I thought it was a good blend in that they were small enough to where we wouldn't be overwhelmed by someone else's presence.... They just seemed like people really wanted to find a church home and understand who we were and how we could worship and work together and share sermons and mix our service.”* Meetings were predominant for Gail among several sources of learning congregational news. *“I mean you find out about ...transitions, but [also] other things going on with the newsletter and stuff like that, but the major stuff I guess only comes up in*

congregational meetings.” She identified congregational gatherings throughout as a major learning **trigger**, from official meetings to worship to social events.

She remembered another congregational meeting where the pastor’s departure was first discussed as a particular **trigger** for learning. She observed, *“There were obviously some things going on beneath the surface that we just started finding out. They didn't like the way that the service was run because it was the same and they wanted to switch things up or whatever. It was just like tension between [the pastor] and mostly the board members and stuff like that, so there was stuff I didn't even know was happening.”* She said she began to hear these things, *“in regular conversations.... I remember ...a [church social gathering] and this bothered me. They were having a conversation at the end of the table about how lies were being told, the tension was coming from like, well she lied to me and this happened or whatever. It was things that, I don't know, it was like one of those situations where when people talk about being authentic and having transparency in a church, that that clearly wasn't happening.”*

She describes her initial strong reaction to hearing things at the social event, *“I kind of walked away, like when me and [my partner] went to the car I was like, ‘I don't know what just happened.’”* Gail summed up her **lesson** learned, *“I learned that there were a lot of tensions that I didn't even know were there.”* This led to a **reframing** of her ideas about the church. She spoke of how she incorporated this into her thinking about the church going forward, *“moving forward I was and still am concerned about, will we have that level of transparency to where it doesn't have to get to that point, to where we don't have to wait for this big moment or this major change to take place for us to have these honest discussions about what's happening in the church.”* Her ongoing concern for congregational transparency was informed by her learning about the hidden tensions in the church.

In another instance of learning, Gail told of **lessons** learned from a time during the transition where people shared stories during worship. *“I think I learned how important it is for us to share our personal stories as far as like our spiritual journey,”* and *“that kind of let me see that everyone is so different even though it may not be diverse in age or race, culture, background or whatever, it's very different and where everyone comes from, like their perspective, but at the same time it's relatable.”* This contrasts with her initial **frame** of impressions of the church as less diverse, *“my first thing I was like, Oh, well, there aren't any black people here. Okay, there are no black people, there seem to be mid-30's and up.”*

Gail outlined her process of learning about religion over her time at Urban, pointing to the **trigger** of feeling out of place on first attending. *“I guess when I first started attending I was really out of place where I had to stop going to church for so long, at least on a regular basis and then I was kind of rediscovering what religion was... I was relearning everything.”* She sought to **acquire knowledge** by *“going through the reading and writing process. I spent a lot of time reading CS Lewis and Thomas Merton.”* She particularly remembered *“discovering what Christian mysticism was and that I can be a follower of Christ ... this mystical side of me that is really apparent in the things that happen and the people in the bible..., like meditation is not just this Eastern practice. It's been going on for a long time and in ways that we don't even recognize.”* She noted how this contested her previous **frames** of understanding. *“That was so different than what I had been taught as a child and so the church, for me, was an opportunity to just start over, like a clean slate, and as an adult to listen and understand the scripture in a different way through the lessons, but to also not solely depend on just church on Sundays, to do my own outside reading, and to understand that I won't agree with every single thing that's said*

or that I may not even connect really well with every single person in the church, but I needed to do the work.”

Wendy: *“Whoa, I totally get it now”* Wendy’s learning during the transition included learning about the congregation’s emotional engagement with the outgoing pastor, their willingness to go the extra mile to welcome someone with a disability, and ways to think about faith. Learning **triggers** include members’ actions and words, and sermons. In Wendy’s case, her learning **framed** and **reframed** her perceptions of the congregation and the way she made meaning in her life.

Wendy described learning about religion during her time at the church. *“I have a lot of friends that have strong beliefs in their own religions and whatnot. I said, ‘I’m becoming tired about having a conversation about religion and stepping out,’ just because I don’t feel like I’m educated enough about it. I feel like the best way to pick up on something, or figure something out, is to throw yourself into that environment.”* She went on, *“...I’m totally down for volunteering, but I don’t know anything about the Bible. Nothing, literally nothing.”* She said that through her participation at Urban, she *“continue[s] to learn things here and there.”* She points to the **triggers** for learning in worship, *“it’s the way that [the pastors] present it. It’s like, ‘I have lived that.’ That’s pretty cool that it came from that part of the bible.”* She described the moment she is able to integrate new **knowledge** or understanding. *“It’s like, ‘Whoa, I totally get it now’”* She said that she looks forward to Sunday, *“hey, maybe next time I’ll learn a new lesson.”* While she noted, *“I can’t cite scripture, not at all,”* in comparing her life in the church to her life before, she says, *“now it just seems more meaningful. I feel like I’m doing it with purpose, if that makes sense.”* She is **reframing** the way she makes meaning out of her life.

Another time, Wendy described learning through people's actions to welcome her that the congregation lives out its stated inclusivity. Wendy observed, *"they're always keeping me in mind. At the moment, I think I'm one of two people that use a wheelchair."* She remembered the **trigger** for this learning being one Sunday she was trying to take the bus, *"that bus that was right there at their new location didn't go on Sundays. [but] the people I've become really close to, they walked with me down to the next stop."* She learned church members were willing to go the extra mile to include her, showing their inclusivity was concrete, more than just a stated welcome. This **lesson** shaped her **frame** of perceptions of the congregation and its members, *"They're always willing to help out, accessible, they're always so opened minded to me.... Any differences you have, religious, physical ability, gender, or whatever, orientation."*

Chapter Summary

In this chapter, I have shared a description of each congregation alongside stories from the members of the three congregations. In each description, I included excerpts from research interviews where participants described their congregation in their own words, a visual description of the church facilities and its physical surroundings, a description of typical worship services, some observations of what I saw and heard on church visits, and a description of the documents used in congregational communication. The following chapter provides a deeper analysis of the data in view of research questions.

CHAPTER 5

FINDINGS

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition, during the period between the exit of a lead pastor and the employment of a successor. The questions that guided this study are:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations. It also probed the influence of organizational characteristics on learning.

In this chapter, I explore the topics, triggers, and patterns of informal and incidental learning for church members and within each congregation. I examine which learning could be categorized as informal or incidental, and any patterns evidenced in this categorization. I note the similarities and differences between the three churches and how any differences may have created a unique context for learning among their members.

The topics of informal and incidental learning that were reported across members and congregations included learning about the congregation, the roles of a pastor, the search process, learning about themselves, their faith, and their church's denomination. The sources of learning that were reported across members and congregations included personal experiences during the transition, prior experiences, other members, church events, official communications, and denominational communications. Patterns of informal and incidental learning appeared to correlate with particular congregational characteristics: structure, stated theology, size, denominational affiliation, and the processes and language used during the transition. Learning tended to be transactional rather than transformative, with little change in frames of reference.

Research Questions: What informal learning occurs in congregants and congregations as they experience leadership transition? What incidental learning occurs in congregants and congregations as they experience leadership transition?

Informal learning is not part of any formal curriculum, and can be intentional and self-directed. In regard to the question of what informal learning was present in these congregations during their pastoral transition, participants reported transition-specific informal learning in the topics of learning about their congregation, their denomination, the search process, and about the characteristics of ministers. Other informal learning included how to get involved in the congregation and learning about faith. Triggers for this learning were announcements and reports at worship and other church events, personal research, denominational communications, and congregational communications.

A summary of the topics and triggers of informal learning found in the data is presented in Table 6, below.

Table 6

Topics and Triggers of Informal Learning

<i>Topics of Informal Learning</i>	<i>Triggers of Informal Learning</i>
Learning about their congregation	Experiences
Learning about preaching styles	Other members
Learning about the search process	Church events
Learning about faith	Official communications
Learning about denominations	Denominations

Incidental learning is primarily unintentional, and can occur as part of a task or activity. In regard to the question of what incidental learning was present in these congregations during their pastoral transition, participants reported transition-specific incidental learning in the areas of feeling and engagement in the congregation, new understandings of tasks and roles of a pastor, the attitudes and diversity in the congregation, and the importance of patience and follow-through. Triggers for this learning were observing different styles of preaching in the pulpit, taking on new tasks of the search committee or duties of the pastor, past mistakes or experiences, hearing public prayers, and simply being involved with the congregation during the transition. Members of Urban reported less transition-specific incidental learning experiences, but this is possibly because they did not undertake a search process. A summary of the topics and triggers of incidental learning I observed in the data is presented in Table 7, below.

Table 7

Topics and Triggers of Incidental Learning

<i>Topics of Incidental Learning</i>	<i>Triggers of Incidental Learning</i>
Learning about the congregation	Experiences
Learning about the roles and duties of a pastor	Other members
Learning about self	
Learning about faith	

Stages of Informal and Incidental Learning

When compared with Marsick and Watkins' informal and incidental learning model (Figure 1), all of the stages of informal and incidental learning were observed in the church members' stories of learning. These stages were not observed as occurring in a set order, but as stages that learners move back and forth among as they process a learning trigger within their unique context. This was seen in the stories of participants, as they responded to a trigger, problem or opportunity in various ways as they sought solutions and worked to make meaning of what they were experiencing. Some stages were observed less than others, such as those connected with examining alternatives, implementing solutions and assessing the consequences of those solutions. The majority of the learning moved more directly from triggers to lessons, and caused little change on larger frames of belief or understanding about their congregational context or faith.

Smalltown. At Smalltown, in the cases of Christine and Valerie, they tended to move directly from triggers to extracting lessons learned, and used those lessons, and their interpretation of them, to make meaning out of her experience. Christine did not change her frame of beliefs that God was playing a role in the transition and that the church had a unique degree of love for one another. She added to and reinforced her frame when she observed new volunteers stepping up, felt that the search committee witnessed to the role of God in the process, observed members learning to love one another more, and formed her beliefs about what to expect from the new pastor.

Valerie similarly spoke most often about moving from triggers to lessons, and sometimes interpretation of those lessons. However in one case, she described acting out response to feeling different about the congregation due to the lack of consistency during the

transition. She reported less attendance during that time, which she interpreted along with her new feelings to conclude that she prefers having a consistent person in the pulpit. She went further in her interpretation to conclude that others may feel this way, leading to less participation from members during the transition. This challenged her frame of feelings about the congregation, being in opposition to her description of the church as somewhere she feels comfortable.

In the cases of Ted and Jack, their involvement with the search process meant that their stories occasionally included planning and taking next steps that derived from the lessons they learned. For example, Ted described the decision of the search committee, triggered by information on past searches and advice from denominational staff, to choose their approach to locating candidates for the position. Jack, triggered by the problem of determining how to get the work of the church done without a pastor, took the steps of volunteering to take on the administration tasks. Their lessons, being more procedural in nature, tended to have no effect on their prior frames of understanding the church and their faith, although they added to their knowledge about the work of the church. In one notable exception, Ted found his frame of God's role in guiding the search strongly reinforced by his interpretation of the trigger experience of being on a search committee that worked with unity and acted in unanimity to select the next pastor.

On the whole, stories of informal and incidental learning at Smalltown were shorter and more direct, consisting of lessons drawn directly from triggers of new situations or information. Effects on frames tended toward reinforcement or addition, rather than transformation.

Suburban. In the case of Gregory, at Suburban, while he experienced some surprises that challenged and added to his frame of beliefs about searching for a pastor and the issue of gay

marriage in the Presbyterian Church, none of those experiences shifted his underlying frame of beliefs about the correct position on same sex marriage. The triggers of errors during interviews added to his skills at interviewing candidates. The announcement of gay marriage changes in the national Presbyterian church and his research triggered by this announcement added to his knowledge about the changes and how they occurred, but his chosen solutions of sending memos, educating the congregation, and calling for the session to develop a policy against same sex marriage demonstrate clearly his persisting belief in the rightness of his position against same sex marriage in the church.

In a similar case, Alan, triggered by his growing awareness of the decline in membership at his church and in the Presbyterian Church as a whole, conducted research for more knowledge about the decline and about Presbyterian churches that were growing. This added to his understanding of Presbyterianism, but did not transform his frame of belief, at least not by the time of our interview. On another front, Alan gained knowledge through reports from the interim pastor and other members on the same sex marriage issue, and was surprised by the votes in the congregation, that among the leadership body, opinions on same sex marriage were nearly equally divided. Yet while this added to his frame of beliefs about Presbyterianism through the knowledge of these differing views on same sex marriage, it did not change his frame of beliefs about the wrongness of same sex marriage, as evidenced by his solution of issuing a congregational response.

Another member at Suburban, Jim, responded to the same trigger of reading online about the same sex marriage changes in the national church, did extensive research and issued numerous memos to the congregation about the changes and how they occurred. These memos make it clear, though, that exposure to the differing perspectives on same sex marriage did not

change his frame of belief about same sex marriage. He used his research to construct detailed rebuttals to the positions of same sex marriage and the methods used to change the policy in the national Presbyterian Church. Although Gregory, Alan, and Jim all reported smaller lessons from their work in the church during the transition that added to their frames of understanding about how to do the work of the church, including the search process, none of them found their frames transformed, in spite of the challenges to their frames by the situation with same sex marriage in the Presbyterian church.

Other members, such as Sue and Jerry, found that their faith experiences and experiences with others in the church added to their frames of understanding life and other issues. In only one case at Suburban did a member report a change in their frame due to learning during the transition period. Jerry told of his experiences at church and with the members of the church changing his frame of mind, from pessimism to a refusal to fall into doubt. This learning was grounded in his experience of some difficult health issues, however, and not directly related to the transition itself.

Overall, the stories of learning at Suburban involved a great deal of research to add needed knowledge, as members sought to grapple with what they perceived as problems, particularly around the issue of same sex marriage. However, in spite of the challenges this new information presented in terms of their existing frames of belief about same sex marriage, none of their frames were transformed, as they only derived from their research the skills and strategies needed to defend their existing position.

Urban. Members at Urban described more changes to their frames of beliefs and perceptions than the members of the other two congregations. For example, Wendy pointed to sermons not only adding new knowledge, but changing her frame of making meaning about her

life. Mark, after an experience of realizing he needed to back off from his work in the congregation to get others to take ownership, found his frame of belief about what was best for the congregation significantly changed. Sarah remembered a time when the actions of members changed her frame of belief in the inevitable decline and death of the congregation.

Gail pointed to her surprise at learning of things going on beneath the surface changing what she had previously believed about the congregation, and her interpretation of that lesson being a new conviction about the need for transparency going forward. Gail additionally noted that while her initial impressions of the congregation were of little demographic diversity, hearing members' stories during the transition changed her understanding as she saw that their perspectives were diverse. Gail further observed that her own attempts to add knowledge about religion, after feeling out of place when she first attended, as a source of change in her frame of understanding scripture, although this learning was not transition-specific.

The congregation as an organization can be said to have changed its frame of understanding their attempts to merge with another congregation. Allyson told of the merger process leading to the decision of the leaders to reframe the process as a consolidation, rather than a merger, changing the frame of understanding what was occurring between the two congregations.

Of course, members at Urban also described lessons that merely added to, reinforced, or had no effect on their frames. They learned how to determine the next steps after the pastor's departure, how to do the work of the congregation, and how the congregation lived out its stated values. Mark found his frame of belief in the need for openness reinforced by his negotiation with long time leaders over changing things in the service. In addition, some frames were challenged but not changed, as in Sarah's description of seeing less integration between the two

merging congregations, but interpreting that as the merger just still needing time and work to get there.

Research Question: What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

Comparison of data across congregations. To examine the question of what role organizational characteristics had in the informal and incidental learning of congregation members during pastoral transitions, I identified certain similarities and differences in the learning of members that correlated with each congregation. All three congregations had members that experienced learning through other members, announcements during worship, updates and announcements from search committees, official church communications, congregational events and forums, and volunteering to take on tasks or duties around the church. Yet the majority of topics and sources of learning were only observed in one or two of the churches. Exploring the possible patterns in these less common topics and sources of learning demonstrates a potential correlation between processes of informal and incidental learning and congregational characteristics, including two of the three characteristics identified in the research question: structure and stated theology; and three additional characteristics: size, denominational affiliation, and the congregation's search trajectory, including processes and language used during the transition.

Structure. Urban members uniquely reported learning from self-study of the Bible and other books about religion. They highlighted learning about ways the church lives out its stated values and learning from the shared stories of other members. One member of Urban reported learning from prior leadership experiences, and another reported learning about setting

boundaries. It is possible that this pattern of learning correlated with Urban's choice of using an existing staff as transitional minister with no formal search process begun during the course of the study. With less information, announcements, and engagement with a search process, perhaps members more easily recalled non-transition related learning connected to their church during the transition period.

Demographics. Although I asked in this research question whether congregational demographics played a role in congregational learning during transitions, I found no evidence for this in the data.

Stated theology. On the question of stated theology, one observation could be made, but might be more accurately labeled as "lived theology." Other learning was unique to each congregation. Smalltown members reported learning from a difference in their engagement and feelings toward the congregation during the transition, from public prayers, and from a sense of the presence of God in the search process. This could potentially correlate to the increased language about prayer I observed at Smalltown, although prayer and God language was evidenced across all three congregations.

Additional organizational characteristics. I did find that additional characteristics correlated with potential patterns, or at least unique indicators, in the data: church size, denominational affiliation and processes used during transition.

Size. Suburban and Urban members had in common experiencing learning through attending board meetings, hearing from others about how to get more involved with the church, and taking part in Sunday School or small groups. Members of those congregations similarly reported learning about religion and the Bible through Sunday School and small groups. These two congregations were smaller than Smalltown, and this pattern of learning was seen in reports

of non-board members attending board meetings, and regular sharing of conversation and study with other members.

Denominational affiliation. Suburban members uniquely experienced learning about the Presbyterian Church-USA decision about same-sex marriage, through denominational communications and websites and communications from church members and the interim pastor. One member reported self-directed learning through research about the decline of the national Presbyterian Church-USA that included visiting other churches to see how they worship. This pattern correlates with the larger denominational resources of the Presbyterian Church on a local and national level, and their higher level of involvement with their congregations, when compared with the Baptist and Congregational churches in the study.

Search trajectories. Smalltown and Suburban can be said to have undertaken formal search processes and interim ministry during their transitions. Urban hired an existing staff as transitional minister, and thus did not utilize search processes or interim ministry. Smalltown and Suburban members experienced learning through denominational officials, hearing sermons from a variety of guest preachers and candidates, developing and implementing the search process, experiencing differences in the roles of interim pastors, recalling or studying past experiences of search and transition, and through surveys and votes that demonstrated the breadth of opinions in the congregation. Smalltown members found a congregational survey very educational, and a survey was not mentioned in other congregations. This learning correlates with these congregations' use of denominational processes and supports for the search process, their use of interim pastors, and their decisions to collect congregational opinions through surveys and votes. Because of the lack of a search process at Urban, there was very little language observed or in

documents about the transition, with that absence further supporting the correlation between processes of transition and learning about those processes.

In addition, at Smalltown and Suburban, I observed in visits and documents widely varying levels of the amount the transition was talked about, and what language was used. The language at Smalltown was frequent during the period of the study and in their documents over the course of their transition, was focused more on prayer than any other topic, and used very positive language. I felt that this language was mirrored in the responses of Smalltown interviewees. In contrast, the transition language used at Suburban during the time of this study and in the documents over the course of the transition was less frequent, was intermingled with a wide variety of other announcements, and was more business-like. This business-like language was present in many interview responses from Suburban. However, since a majority of interviewees were in senior lay leadership roles, it would be impossible to say if their individual styles of speaking influenced the church's language style, or vice versa.

Effect of learning on frames. While Smalltown and Suburban members demonstrated a strong persistence of frames being added to or reinforced by transition experiences, or even in the face of new information or surprises that challenged those frames, this persistence was not seen across the board. The greater presence at Urban of incidental and informal learning causing changes to frames could imply that a church that does not conduct a search process is thus not tied up in those steps of forward movement and must find their own way forward. Unlike Suburban, they did not have a pressing issue that they felt needed a response, and had no steps to work through on their way toward constructing such a position. The merger did provide some opportunities for learning connected to a specific process, but because there were no specific

steps that needed taking or timeline to follow, perhaps it left the merging congregations more open to learn in the diverse and more transformative ways mentioned in their stories.

Other findings. I identified certain patterns in the learning of members that correlated with their role in the congregation. Those whose primary role in the church was as a member reported proportionally more learning about religion, the Bible, values, and how to get involved with the church. Sources of this learning primarily included worship, church events, and talking to other members. Those who were members and involved in at least one volunteer responsibility either now or in the past reported additional learning about different feelings or engagement during the transition, different styles of preaching from visiting pastors and candidates, and hearing from public prayers, other members and official communications to learn more about the search process. Those who served in leadership roles spoke of learning about the role of the pastor, being patient, and the general status of finances, administration and personnel in the church. They learned these things through volunteer tasks, participating in sharing information and decision making in their leadership role, and conducting their own research. Those who served on the search committee reported more specific learning connected to their experiences on that committee, including how to search for a new pastor, informed by records of past searches, denominational guidance in the search process, and personal experiences including trial and error as they searched for the new pastor.

One additional possible pattern emerged from the data regarding informal vs. incidental learning in the participants. Participants who were simply members of a congregation without greater involvement reported very little incidental learning. The majority of their learning was informal. The exception to this was information they learned through talking to other members,

which could be identified either way depending on whether they asked for the information they were given.

Chapter Summary

The questions guiding this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

Informal learning was reported in the areas of learning about their congregation, their denomination, the search process, the characteristics of ministers, how to get involved in the congregation and their religion. Congregants reported sources of informal learning that included announcements and reports at worship and other church events, personal research, denominational communications, and congregational communications. Incidental learning was reported in the areas of feeling and engagement in the congregation, new understandings of tasks and roles of a pastor, the attitudes and diversity in the congregation, and the importance of patience and follow through. Sources of incidental learning included observing different styles of preaching in the pulpit, taking on new tasks of the search committee or duties of the pastor, past mistakes or experiences, hearing public prayers, and simply being involved with the congregation during the transition.

All three congregations reported learning through other members, announcements during worship, updates and announcements from search committees, official church communications, congregational events and forums, and volunteering to take on tasks or duties around the church. Other topics and sources of learning differed, with some potential correlations with structures, stated theology, congregational size, denominational relationship, and the processes and language they used during the transition. Across congregations, the most involved members reported the most incidental learning.

In terms of the stages of informal and incidental learning, all were observed at some point in some of the stories of learning, with the least observed being those connected with examining alternatives, implementing solutions and assessing the consequences of those solutions. Much of the learning observed was inwardly focused, and moved more directly from triggers to lessons, adding to or reinforcing, rather than changing, larger frames of belief or understanding about their congregational context or faith. The exception was in the members at Urban, who seemed to experience greater changes in frames than other participants, although little of this was transition-specific, perhaps due to their lack of a search process.

The following chapter explores these findings further in light of existing research on informal and incidental learning, organizational learning, and transitions. I highlight areas in which this research supports the existing body of research, areas where this research might diverge from or add to existing knowledge, and implications of this study for future research and practice.

CHAPTER 6

SUMMARY, CONCLUSIONS, AND IMPLICATIONS

Summary of the Study

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition during the period between the exit of a lead pastor and the employment of a successor. The research questions guiding this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations, and probed the influence of organizational characteristics on learning.

Although some aspects of leadership transitions have been studied empirically, at the time of this study there was little data on the effects of leadership transitions on individual members of organizations or in the context of congregations. This study examines the informal and incidental learning of individual congregants during congregational leadership transitions

and thus adds to the body of knowledge around experiential, informal and incidental adult learning during leadership transitions. This study increases understanding of the applicability of theories of informal and incidental learning in congregations and highlights how informal and incidental learning occur during various aspects of congregational life. This study offers those who lead and study congregations insights into leadership transitions and the learning that occurs during those times. The findings from this study can equip leaders and scholars with knowledge they need for designing interventions and intentionality around learning during pastoral transitions.

This study was rooted in a theoretical framework that combines theories and models of experiential and informal learning in community with the existing knowledge on leadership transitions. According to informal learning theory, learning occurs throughout people's experiences in communities and organizations and can be informal and/or incidental (Bolt, 2008; Dewey, 1938/1997; English, 2000; Marsick, Volpe, & Watkins, 1999; Marsick & Watkins, 2001; Vygotskii, 1978). Learning in communal contexts can be best conceptualized through models of learning in community (Argyris & Schon, 1996; Doornbos, Simoons, & Denessen, 2008; Fenwick, 2000; Findsen, 2006; Foley, 1993; Kilpatrick, 2002; Lange, 2007; Lewis, 2009; Lave & Wenger, 1991; Lave & Wenger, 1998; Sandlin & Bey, 2006; Vygotskii, 1978; Wenger, McDermott, & Snyder, 2002). Disorientation and change during leadership transitions are evidenced in the existing research in this area (English, 1999a; Ahearne, Lam, Mathieu, & Bolander, 2010; Beatty & Zajac, 1987; Cao, Maruping, & Takeuchi, 2006; Friedman & Saul, 1991; Friedman & Singh, 1989). These theories, models, findings, and their intersection guided this study and are vital to the analysis and implications reported here.

To explore the learning in congregations experiencing pastoral transition, I used a multiple case study approach. Data collection included interviews, observations, and document analysis, which allowed me to explore the experiences of the congregants in three congregations as they experienced a change in their lead pastor. I used this data to build a picture of informal and incidental learning in the congregations and their congregants. I then examined the influence of organizational characteristics on the learning I discovered.

To analyze the data, I identified stories in the interview data and coded them according to the language used by interviewees, and grouped these stories into themes relating to the research questions. I then utilized the documents and observation data to fill out the descriptions of the congregations and address whether organizational characteristics influenced learning. I compared the learning stages observed in participants' stories to the stages in the model of informal and incidental learning and noted any patterns seen within individual stories, within particular churches, and across the three churches.

I found in the data evidence of informal and incidental learning about the congregation, the roles of a pastor, the search process, and participants learned about themselves, their faith, and their church's denomination. The sources of this learning included personal experiences during the transition, prior experiences, other members, church events, official communications, and denominational communications. Patterns of learning echoed existing research on informal and incidental learning processes and effects. To encourage this learning, facilitate transformation, and prevent learning errors, congregations should establish supports and structures to facilitate informal and incidental learning, particularly during pastoral transitions.

Conclusions

I have identified four conclusions that can be drawn from this study. While all echo and are supported by existing literature on informal and incidental learning and leadership transitions, their significance is in expanding the understanding of these areas in the congregational context. The three conclusions are:

Conclusion 1: During pastoral transitions, religious life and practice, including presentations of information, interaction with others, self-directed knowledge seeking, and personal experiences in a congregation, are triggers of informal and incidental learning in members about the pastoral search process, the roles of pastors, their congregation, their denomination, and their faith.

Conclusion 2: The patterns of informal and incidental learning that occur in congregations during pastoral transitions are correlated with congregational transition trajectories, characteristics, structures and mechanisms.

Conclusion 3: Frames of belief and understanding persist in the face of informal and incidental learning, despite experiences and new knowledge that challenges those frames.

Conclusion 4: Leadership transitions can trigger learning in members, and thus affect the organizations of which they are a part. This learning could be increased through organizational intentionality and structures designed to support this learning, resulting in positive changes in members and their congregations.

I explore each of these conclusions and the support for them in the literature and this research in the paragraphs below.

Conclusion 1: During pastoral transitions, religious life and practice, including presentations of information, interaction with others, self-directed knowledge seeking, and personal experiences in a congregation, are triggers of informal and incidental learning in members about the pastoral search process, the roles of pastors, their congregation, their denomination, and their faith.

The research on informal learning describes it as having no external curricula, teacher, or structure (Livingstone, 2001; Bear et al., 2008; Tannenbaum, Beard, McNall, & Salas, 2010). Occurring constantly across all life stages of adults, informal learning makes up a large and potentially predominant portion of all learning (Schugurensky, 2000; Marsick, Volpe, & Watkins, 1999; Tough, 1971; English, 2000; Livingstone, 2001; Candy, 1991; Brockett & Hiemstra, 1991; Brookfield, 1981; Bear et al., 2008; Tannenbaum, Beard, McNall, & Salas, 2010). Life events, leisure, community service, and religious practice are important sources of informal learning (Merriam & Clark, 1993; Livingstone, 2001). This study confirmed this research, and specifically demonstrated that religious life and practice is a source of informal learning.

Participants in this study learned without a curricula, teacher or structure, about their congregation, their denomination, the search process and about the characteristics of ministers. They learned about their religion, and about how to get involved in the activities of the congregation. Informal learning can look like planned and unplanned, intentional and unintentional activities as networking, coaching, mentoring, or self-directed knowledge seeking (Marsick & Watkins, 2001). According to Marsick & Watkins (2001), much informal learning occurs due to an unexpected dissonance from a situation or new information, such as a challenge to prior knowledge or an unsettling experience. In this study, participants reported learning from new information presented in congregational/denominational communications, announcements

and reports at worship and other church events, and from their own self-directed personal research and information-seeking from experts about the search process or about denominational decisions about gay marriage, which all presented new or unsettling challenges for participants.

Informal learning has environmental, cognitive, and emotional dimensions (Sawchuk, 2008), and an individual's psychological capital, or their self-efficacy, hope, optimism and resilience, can have an influence on their ability to learn informally (Luthans et al., 2007). The congregational context, or organizational environment, in this study influenced participants' learning in that the congregational characteristics affected the topics and sources of learning. Cognitive dimensions of learning reported in this study included trying to make sense of different viewpoints on gay marriage, and incorporating new information on the role of a pastor and how best to search for a pastor. Emotional dimensions were observed primarily in the feelings participants reported about the transition and about the issue of gay marriage. The study design did not provide enough information to detect differences in participants' learning capacity or psychological capital and their effect on learning.

Incidental learning research identifies it as unintentional, and often coming at random from mistakes or experiences that cause reorientation, in ways that learners experience at varying levels of consciousness (European Commission on Lifelong Learning, 2001; Marsick, et al., 1999; Straka, 2004; Colardyn & Bjornavold, 2005; English, 1999b; Stern & Sommerlad, 1999; Schugurensky, 2000; Eraut, 2004). Because it can be random and even unconscious, learners can find it difficult to articulate, although this may vary by the role of the learner within the organization (English, 1999b; Gorard, Fevre, & Rees, 1999; Manuti, Pastore, Scardigno, Giancaspro & Morciano, 2015). I found that participants easily reported incidental learning in their reflections on the way that they felt and engaged with the congregation, their articulation of

new awareness/understanding of the tasks and roles of the pastor and the characteristics of the congregation, and their descriptions of life lessons such as having patience or prioritizing follow through to achieve congregational goals. Incidental learning typically resulted from simply living and observing as a part of the congregation, and trying out new roles and often making mistakes along the way.

Revisiting Marsick and Watkins' Model of Informal and Incidental Learning, we see that learning is rooted in interpretation of an experience or trigger that presents a problem or dissonance when compared with existing knowledge or their present context, and that learners then contemplate alternative solutions to resolve this problem or dissonance, try them out, and assess the potential consequences, incorporating any lessons learned back into their knowledge and context (Marsick and Watkins, 2001). Participants exhibited learning that fit this model, in that there were many triggers during the transition time, and they processed those into learning by talking to other congregants, doing their own research, observing, and reflecting on the situation. This is not necessarily a linear process, but a journey within the circle of these learning steps, moving back and forth around the circle to make sense of the trigger or experience, always influenced by the context (Marsick & Watkins, 2001). They tried out alternative ways of going forward by having conversations, by making proposals in committees or teams, or simply by realizing new knowledge. It is unclear from the data whether they have reintegrated their new knowledge into their context, although some stated an intention to do so, but this would not be evident until a future transition where new knowledge about pastoral transitions could be applied.

Some stories of learning had their roots in experiences or transitions prior to this pastoral transition period. This could reflect the theory and research that informal and incidental learning

often weave together recollection of past experiences with current situations to create new knowledge or understandings (Yelich Biniecki, 2010; Mahmood & Hasnaa, 2005). Alternatively, it could derive from the difficulty in limiting story-telling about learning at church to one particular time period, if there are more vivid stories that stand out in the recent or not-so-recent past. This could be particularly true if these stories have not yet been told before the interviewer's inquiries on the topic.

Conclusion 2: The patterns of informal and incidental learning that occur in congregations during pastoral transitions are deeply connected with the congregational context, and correlated with congregational transition trajectories, characteristics, structures and mechanisms.

Research done on learning in congregations suggests that members of congregations are constantly learning, largely informally and incidentally, through music, symbols, engagement with sacred texts, architecture, dialogue, coaching, mentoring, and practicing ministry (Barnes, 2005; Doerrer-Peacock, 2009; Hirji, 2006; English, 1999b; Fleischer, 2006). Times of transition are a source of this type of learning (English, 1999a; Kratz, 2008; McClory, 1998; Wright, 2009).

Congregations function as both communities and organizations, and research on learning in communities and organizations roots learning in social interaction, shared beliefs and context, shared practices, activities, spaces, characteristics, and organizational culture (MacQueen, et al., 2001; Fleischer, 2006; Merriam et al., 2003; Price, 2004; Doornbos, Simoons, & Denessen, 2008; Ellinger and Cseh, 2007; Lange, 2007; Findsen, 2006; Foley, 1993; Vygotskiĭ, 1978; Wenger, 1998; Lawrence, 2008; Lewis, 2009; Sandlin & Bey, 2006; Wallace, 2007; Fenwick, 2003; Kilpatrick, 2002; de Carteret, 2008). In the data, the shared context of a pastoral transition and the shared beliefs, practices, activities and spaces of congregational life were clear themes in

informal and incidental learning among the participants. Social interaction was a prevalent source of learning reported by church members.

The learning reported by participants was primarily grounded in the context of the unique pastoral transition in their particular church or denominational context, echoing the presence of context throughout Marsick and Watkins' (2001) model. Context had a strong influence on the learning reported by participants, in that all stories were somewhat unique to a church setting, and there were distinct differences between churches due to their characteristics and denominational affiliation. I observed a potential correlation between certain types of informal and incidental learning and particular congregational characteristics, including two of the three characteristics identified in the research question: structure and stated theology; and three additional characteristics: size, denominational affiliation, and the processes and language used during the transition. Members of Smalltown and Suburban, churches with stronger denominational affiliation and more prescribed search resources, experienced learning through these contacts and resources, while very little of that type of learning was reported at Urban, which was more loosely connected to its denomination and did not conduct a search. The two smaller congregations reported more learning from small group contexts and discussions with other members. Smalltown members reported a great deal of learning connected with the grappling of their church and denomination with the issue of gay marriage during the period of the pastoral search. These patterns are significant enough to conclude with some confidence that each congregation will have informal and incidental learning that is unique to its context, even while some overarching themes of learning may be present in all congregations undergoing transition.

Participants' ability to articulate their incidental learning seemed high, compared with previous research on the topic that suggests it can be difficult to articulate and measure (English, 1999b; Gorard, Fevre, & Rees, 1999). Although this study did not delve into articulation as a research question, it is possible that preexisting congregational structures such as Sunday School and small groups had cultivated habits of reflection in the lives of congregation members that could have increased awareness of incidental learning. Thinking back to how some interviewees seemed to realize learning as the interview was taking place, it is additionally possible that storytelling in the form of research interviews helped them surface learning, which could indicate that facilitating story sharing in a congregation undergoing transition could be a potential support for incidental learning.

I did not hear of intentional opportunities provided by the congregation for participants to surface their learning during the pastoral transition, confirming research that suggests these types of opportunities are rare in congregations (Davis, 2007; Crain & Seymour, 1997). Participants reported much learning that was connected to working together with other members to conduct the search for a new pastor or keep ministries/activities going during the transition time, but no dedicated time for reflecting on that learning. Yet the deeper their involvement, the more they learned, supporting Lave and Wenger's (1991) assertion that deeper involvement results in greater learning.

Conclusion 3: Frames of belief and understanding persist in the face of informal and incidental learning, despite experiences and new knowledge that challenges those frames.

Prior research on informal and incidental learning has shown that all the stages of informal and incidental learning are influenced by learners' frames of reference (Woffard, 2011). Woffard (2011) found that learners interpreted and responded to situations out of their frames

consisting of prior experience, expectations, beliefs, and value structures. No part of their informal and incidental learning process was free of the influence of their frames of reference (Woffard, 2011). Similarly, congregation members in this study seemed to interpret most of their learning during pastoral transitions through the lens of their frame of reference, if the lesson intersected with their frame at all.

Research on transformative learning asserts that most learning is transactional, rather than transformative. Transactional learning, where learning through experience results in increased skills or information, can slightly modify learner perceptions (Mezirow, 2000). This type of learning does not tend to shift behavior or attitude. Transformative learning, on the other hand, grows out of disorientation to transform the learner's beliefs, values, assumptions, or habits (Mezirow, 2000). Congregation members reported a great deal of learning that simply obtained information or skills needed to move forward in their responsibilities to the congregation. Only rarely did learning change their frames of reference beyond merely adding knowledge or skills, modifying their frames slightly or reinforcing them. Even disorienting experiences such as learning of the changes in gay marriage policy in the national church, or feeling much less comfortable in the congregation during the transition were likely to be interpreted through the lens of their frame of reference and reinforce that frame, rather than change it significantly.

Additionally, in the field of neuroscience, brain imaging research has demonstrated that strongly held beliefs are not only difficult to change, but that brain processes actively resist changing them (Westen, Blagov, Harenski, Kilts, & Hamann, 2006). Parts of the brain that handle reasoning are less active when we are faced with information that challenges our strongly held positions (Westen et al., 2006). The most active areas are those handling emotions and resolving conflict, followed by activity in the pleasure area when the conflict is believed to be

resolved (Westen et al., 2006). Echoing this brain research, on issues about which study members felt the most strongly, such as their beliefs about God and their belief in the rightness of gay marriage, no changes in frames of reference were seen. In fact, in the members of Suburban, it did seem that some pleasure could be detected in their reporting of how they investigated and discovered the method for changing national church policy, and deemed it unconstitutional, thus supporting the rightness of their positions against gay marriage.

In this study, members reported learning that added to, reinforced, and even challenged their frames of reference. In only a few cases did that learning change their frame of reference. On matters about which they felt strongly, changing frames of reference was quite rare. This suggests that beyond merely permeating every stage of informal and incidental learning, frames of reference are so persistence as to actually impair or prevent changing those frames, particularly in the face of a body of learning that is primarily transactional. Therefore, the “reframe context” stage of the informal and incidental learning model may actually be rare. It is possible however, as noted by Mezirow (2000), that transactional learning experiences can build into a transformative effect over time. Further research is needed to determine if such resistance to reforming frames is seen across contexts, or if is unique to the congregational context or this particular study.

The research literature on informal and incidental learning in congregations, with the addition of the findings from this study, is summarized in Table 8 below.

Table 8

Research on Informal and Incidental Learning in Congregations

Author	Year	Context	Population	Sample	Methodology	Conclusions
Barnes	2005	Congregations	Black churches	1863	Survey	Member learning from gospel music and other cultural symbols such as those historically linked to group solidarity, liberation themes, racial dynamics and the need for social justice, was correlated with church involvement in socio-political community events.
Crain, Seymour	1997	Congregations	Adult Laity	11	Participatory Ethnography	Theology and use of their own resources to make meaning informed the daily living of lay members in their struggle to understand how to be faithful.
Davis	2007	Congregations	Adult Laity	12	Interviews, Document Based	Contextual spiritual learning experiences of laity are associated with an experience of peace.
Doerrer-Peacock	2009	Congregations	Congregation	1	Narrative Inquiry	Space, story, and symbol are sources of learning and transformation, changing meaning narratives within a congregation.
English	1999	Congregations	Roman Catholic parishes	4	Observation, Interview	Dialogue, networking, coaching and modeling from pastors is a source of informal learning in Roman Catholic parishes.
Everist	2001	Learning Groups	Adult Laity	3	Case Descriptions	Laity learn from hearing from each other about the role of their faith in their vocational lives.
Fleischer	2006	Congregations	African-American Catholic lay pastoral leaders	46	Interviews, Surveys	The primary vehicle for learning among congregational lay leaders was involvement in the practice of ministry with other members and leaders. Dialogue with others supported this learning.
Hall	2016	Congregations	Congregations	3	Case Study	Religious life and practice, including presentations of information, interaction with others, self-directed knowledge seeking, and personal experiences in a congregation, are sources of informal and incidental learning about a congregation, denomination, and religion, about the pastoral search process, the roles of pastors, and how to deepen their involvement. This learning is rarely transformational to frames of reference. The informal and incidental learning that occurs in congregations is influenced by congregational characteristics, structures and mechanisms. Learning could potentially be improved and increased through organizational intentionality and structures designed to support this learning.

Conclusion 4: Leadership transitions can trigger learning in members, and thus affect the organizations of which they are a part. This learning could be increased through organizational intentionality and structures designed to support this learning, resulting in positive changes in members and their congregations.

Research is divided as to the effects of leadership transition on organizations. It has been shown to destabilize, improve, or have no effect at all on organizations including businesses, non-profits, and congregations (Grusky, 1960; Friedman & Singh, 1989; Guest, 1962; Gameson & Scotch, 1964; Beatty & Zajac, 1987; Buoziute-Rafanaviciene, Pundziene, & Turauskas, 2009; Kesner & Dalton, 1994; Zhang & Rajagopalan, 2004; Cao, Maruping & Takeuchi, 2006; Valentine, 2011; Lohnes, 2008; Hinden & Hull, 2002). Researchers have suggested these differences could be attributed to the differing characteristics of each transition and organization (Farquhar, 1996; Friedman & Singh 1989; Kesner & Dalton 1994; Lant, Milliken, & Batra, 1992; Virany, Tushman, & Romanelli, 1992; Beatty & Zajac, 1987; Carroll, 1984; Friedman & Saul, 1991; Guest, 1962; Weiner & Mahoney, 1981). This study did not provide enough data over time to determine how the transitions I observed might affect the congregations in the long term.

I did see some differences in short term effects based on the differences in transitions. Suburban, with its longer transition, had members that reported learning about the challenges of finding the right pastor. During the transition period at Smalltown, one member noticed a lower level of engagement during the interim period, which echoed research that transitions can increase conflict and affect organization member stability and morale (Wheeler, 2008; Friedman & Saul, 1991; Gilmore, 1988; Greenblatt, 1983; Pfeffer, 1981; Farquhar, 1991). Research that identified member coping strategies as rehearsal of options, observation, testing, and adjustment

to cope with transition (Farquhar, 1989) closely parallels Marsick and Watkins' (2001) model of informal and incidental learning, which this research seemed to confirm was a process at work in members during pastoral transitions. Farquhar's (1991) research noted that for some members, transition increased unity, and one member's stories of serving on the search committee at Smalltown Baptist conveyed a belief that unity was a significant part of their transition process. However, to draw any definitive conclusions on effects on organizational stability and functioning as a whole, a longer study that could compare pre and post levels of stability and functioning would be required.

Research showing the learning effects of transitions on congregations suggests that transitions expose congregation members to different experiences, roles, and theology (English, 1999a; Kratz, 2008). This was evidenced in several participants' stories about hearing different guest and interim pastors preach and thinking about the many ways to deliver sermons. Other participants reported new experiences in participating in the search process or taking on duties that belonged to the departed pastor and learning from them. English (1999a) found that congregants learned informally and incidentally about leadership, the roles of pastors and laity, and about sacramental practice. Participants in this study reported learning about leadership, the roles of pastors and congregation leaders, and worship ways, echoing English's findings. English's (1999a) study found congregant's experienced changes in practical theological beliefs. I did not hear reports of changes in theological beliefs in this study, but did hear stories of members engaging and even deepening their existing theological beliefs during the time of transition. Loyd (2009) asserted that congregations must invent new behaviors and attitudes to cope, which echoes Marsick and Watkins' (2001) model of informal and incidental learning, and was seen in participants' stories of developing new ways of being in and supporting the church

during pastoral transition. The research literature on leadership transitions, with the addition of the findings from this study is summarized in Table 9, below.

Table 9

Research Literature on Leadership Transitions

Author	Year	Context	Population	Sample	Methodology	Conclusions
Bolt	2008	Business Organizations	Organization members	218	Case Study	Informal learning was seen by members to be as effective or more effective than formal learning.
Cseh	2002	Business Organizations	Business Owner-Managers	18	Critical Incident Technique	Owner-managers learn informally what they need to know to run their businesses through doing their work and through governmental publications.
Desikan	2009	Consulting Organizations	Organizations	1	Case Study	Professionals learned and evolved through participation in a community of practice. Learning was affected by the socio-cultural context of the professionals and the organization.
Ellinger, Cseh	2007	Business Organizations	Employees	13	Case Study	Catalysts for learning included learning-committed leadership, stimulation by other employees, and a learning culture. Learning is hampered by negative attitudes, fast-paced change, and lack of time.
English	1999	Pastoral Transition	Roman Catholic parishes	4	Observation, Interview	Informal and incidental learning about pastoral leadership, sacramental theology, the church, and their feelings about it, occurred among members during a leadership transition, with varying levels of articulation.
Lohman	2009	Workplace Learning	IT Professionals	143	Survey	IT professionals favor independent activities over face-to-face activity for informal learning. Informal learning is hampered by lack of time and lack of proximity to colleagues.
Marsick, Watkins	2003	Business Organizations	Companies	200	DLOQ (Dimensions of Learning Organization Questionnaire)	There is a correlation between learning organization dimensions and organizational knowledge and performance.
Ross-Gordon, Dowling	1995	Voluntary Associations	Association members	28	Interviews	Voluntary association members learned through their work with the organization, in areas of skills, abilities, and sense of self.
Song, Kolb	2009	Business Organizations	Employees	633	Survey	Learning organization culture improves the impact of knowledge creation in organizational members.

Table 9

Continued

Ziegler	1999	Business Organizations	Organizations	1	Case Study	Informal learning in organizations experiencing change can lead to challenging mental models and learning new things. Change can be constrained through difficulty in putting new ideas into practice. Learning is facilitated by organizational commitment to learning and shaped by organizational culture.
Kratz	2008	Pastoral Transition	Pastor	1	Autoethnography	A new pastor brings in previous experiences into conversation with the congregation's patterns of life, and can help a congregation see itself in new ways.
Loyd	2009	Pastoral Transition	Congregations	2	Case Study	Theology and leadership structures shape the process and impact of pastoral leadership transition.
Uhl	2010	Pastoral Transition	Congregations	62	Quantitative	Pastor turnover affects congregational performance.
Wright	2009	Pastoral Transition	Congregation	1	Narrative Action Research	Narrative tools help congregations develop new ways of seeing, hearing, thinking, and speaking about themselves.
Hall	2016	Congregations	Congregations	3	Case Study	Pastoral transitions can disorient a congregation and trigger learning in members, and this learning could be utilized for positive changes if supported.

In congregations, just as in all organizations, intentionality and engagement of as many stakeholders as possible can ease transitions and aid in learning. (Wright, 2009; McClory, 1998; Loyd, 2009). At Smalltown, several members mentioned the survey designed to engage the congregants' voice in the search process as a source of learning about the preferences of their fellow congregants. This demonstrated the engagement of stakeholders as a trigger of learning. Intentionality around transition-related learning during the search was not present in any of the study congregations. Without such learning structures in place, could the congregations as a whole be said to have learned anything?

Organizations that learn show changes that result from member learning and change (Rhodes, 1996; Argyris & Schon, 1978; Kasl, Marsick, & Dechant, 1997). Learning on an organizational scale is rooted in group dynamics, often resulting from high stakes events and working on meaningful problems together, and with adequate group cohesion, can bring new

insight and behavior into the operations of the organization (Watkins & Marsick, 2010; Ziegler, 1999). While the potential for learning as an organization was certainly present in the congregations I studied, faced as they were with a very high stakes event in their pastor's departure and having to work together to get through the transition, in the short term it was impossible to detect learning in the organization as a whole. A longer study could collect data in the years post-transition and compare the behaviors and language of the congregation post-transition with those from before the pastor's departure, and in that way identify any ways the congregation learned as a whole organization.

To increase the probability that organizational learning would occur during pastoral transitions, congregations could develop supports and structures to facilitate learning. Learning in organizations is influenced by structures and mechanisms including organizational culture, internet usage, collegial relationships and proximity, worker characteristics, and levels of work pressure, organizational climate and culture, individual characteristics, available resources, and opportunity for critical reflection, collaboration, opportunities for knowledge sharing, time and space for reflection, links to formal learning, and attitudes of leader and managers (Ellinger & Cseh, 2007; Doornbos, Simoons & Denessen, 2008; Lohman, 2009; Marsick & Watkins, 2003; Fleischer, 2006; Doerrer-Peacock, 2009; Lawrence, 2008; Mercer, 2006; Price, 2004; Marsick et al., 1999; Boud, Rooney, & Solomon, 2009; Ellinger & Cseh, 2007; Cseh, 2002; Bolt, 2008). Research has indicated that learning in community can be promoted by using supported and facilitated opportunities to surface knowledge and work/participate together with other community members (Balan, 2005; Tyler, 2005; Lawrence, 2008; Merriam, Caffarella, & Baumgartner, 2007; Kovan & Dirkx, 2003; Parrish & Taylor, 2007; Lave & Wenger, 1991). Learning is strengthened through opportunities for critical reflection and shared meaning-

making, which are rare in congregations (Doerr-Peacock, 2009; Mercer, 2006; Price, 2004; Davis, 2007; Crain & Seymour, 1997).

Communities of practice are communities formed around a domain and practice made up of individuals with a shared concern and passion for their work together (Wenger, McDermott, & Snyder, 2002; Wenger, 2006). Learning is thus promoted through shared practices, context, activities, beliefs, values, and symbols and sharing these in pursuit of a common goal over time (Wenger et al., 2002; Wenger, 1998). Routine interactions, collaboration, and shared goals and meanings build a sense of identity, mutual respect, trust, and accountability among members (Hakkarainen, Palonen, Paavola, & Lehtinen, 2004; Desikan, 2009; Merriam, Courtenay, & Baumgartner, 2003; Lave & Wenger, 1991; Wenger, 1998). Learning often occurs in communities of practice as members move from newcomers/novices toward expertise and deeper involvement, supported by and interacting with members, reflecting on this process as they move along it. (Lave & Wenger, 1991; Wenger, 1998; Bussye, Wesley, & Able-Boone, 2001; McDermott, 1999).

The learning organization is another model that could be helpful in supporting and facilitating learning in congregations during pastoral transitions. A learning organization (Senge, 1990; Lave & Wenger, 1991) learns through personal mastery, team learning, mental models, shared vision, and systems thinking. Learning organizations have learning as a part of their organizational culture. When congregations function as learning communities, or learning congregations, learning is supported through opportunities for learning, spiritual encounter, critical reflection, collective meaning-making, creativity and dialogue, both of which have a positive effect on individual learning (Fleischer 2006; Price, 2004; Davis, 2007; English, 2000;

Luckie, 2005; Finsen, 2006). This type of support should be encouraged in congregations, because informal and incidental learning can support spiritual learning (English, 2000).

To those of us who work with congregations, our context mirrors almost all of the characteristics of learning communities, and some of the characteristics of learning organization. Are congregations already communities of practice, then? The most involved members in this study, and those who were pulled during the transition into deeper involvement, evidenced the most learning. Members of these congregations, while they shared practices, activities, contexts, beliefs, values, and symbols, were sometimes divided as to their vision of what the congregation should achieve and where it should go in the future, as in the close vote on gay marriage at Suburban. Additionally, newcomer integration is not always immediately effective, as shown in the attempt to merge two congregations at Urban, where the members of the incoming congregation still primarily interacted and identified with the other members of their previous congregation. In the data, the congregations did not function obviously as communities of practice. And what of learning organizations? While learning activities and shared vision are often present in congregations, other indicators of learning organizations such as personal mastery, team learning, and systems thinking are less common.

It would take intentionality on the part of the congregation to truly integrate learning as a part of the organizational culture. Due to the persistence of frames, a great deal of support would be necessary for real transformation to take place during transition learning experiences. Further study could examine how and why congregations do/do not function as communities of practice or learning organizations, and what actions could be taken to support that level of functioning. I will go into greater detail about options for that research and practice in the following section.

Implications for Practice

Intentional supports and structures to facilitate learning during pastoral transitions could increase and improve informal learning among members (Marsick, Volpe, and Watkins, 1999) and increase consciousness of incidental learning among members (Ellinger & Cseh, 2007). Learning supports and structures provide opportunities for dialogue and critical reflection to test new learning against existing beliefs and practices and weave them together for new understandings with which to move forward. (Doerr-Peacock, 2009; Mercer, 2006; Price, 2004; Davis, 2007; Crain & Seymour, 1997). Learners can find empowerment in starting with their own internal learning to make meaning in congregations, in contrast to front-out or top-down methods of learning such as sermons and classes (Colley, Hodkinson & Malcolm, 2002). Also, facilitation of informal and incidental learning can combat errors caused by faulty interpretation of experiences by members (Marsick & Watkins, 1997; Evans & Kersh, 2004; Nonaka, 1991; Tough, 1971; Woffard, Ellinger & Watkins, 2013), interpretations that could estrange or detach them from the congregation and other members.

Literature from other fields provides suggestions for designing these structures and supports. First, congregations must create a climate of collaboration and trust if they seek to enhance informal learning (de Feijter, de Grave, Koopmans & Scherpbier, 2013). More specifically, Tyler's (2005) study of organizational change in a college suggests that narrative work such as using metaphor to analyze individual and organizational actions during the change aided them in meaning-making around the transition. This is reinforced by Balan's (2005) study of professional women experiencing organizational change, which showed that focus groups helped them give voice to their experiences.

Research additionally suggests that learning during experiences of change and transition can help members of an organization develop change skills they can use going forward, leaving those who seek out learning better equipped to handle transition and change (Alonderiene & Pundziene, 2008; Marsick & Watkins, 2001; Balan, 2005; Tyler, 2005; Dechant, 1999). Change skills among its members would be an asset to any congregation.

Although frames persisted in the face of informal and incidental learning, even when new knowledge challenged those frames, it is possible to foster transformative learning. Heddy and Pugh (2015) suggest that creating smaller transformative experiences can have the cumulative effect of facilitating transformative learning. Existing models of spiritual learning could be harnessed to develop processes and programs to create transformative experiences for members during the pastor transition. With the potential for learning errors and persistent frames of reference during pastoral transition, there is a danger that a pastoral search simply becomes an attempt at role replacement. Simply filling the pastoral role with someone expected to act exactly like their predecessor reduces the potential of the congregation for real change and forward movement. Congregations could foster positive change skills and plant the seeds for real change and renewal by providing opportunities to surface knowledge, facilitate member learning, and promote transformational learning during transitions.

The two models, of learning organizations and communities of practice, both have characteristics which cultivate and support learning and could be helpful here. Congregations could make a commitment to a culture of learning, and live that out by building structures and activities into their congregation that emblemize either a learning organization or community of practice. This type of commitment to learning would support and facilitate informal and

incidental learning and aid shared meaning-making among members, as they surface the learning that is already occurring through involvement with the congregation.

Limitations of this Study

There is a significant limitation in the lack of diversity among the churches studied. Although they were geographically diverse, and one congregation was much more diverse than the other two in terms of sexual orientation and somewhat more diverse racially, the congregations in this study were predominately white. All three were churches of under 250 in worship attendance that came from denominations that would be identified with the mainline church, or the group of historic and theologically moderate to liberal protestant denominations in the United States. The study was limited temporally in that a year or less was spent with each congregation, hampering the possibility of studying any long term effects of the pastoral transition on learning or the characteristics of the congregation.

Implications for Further Research

In the literature review, I was able to identify a significant gap in the literature on organizational leadership transitions in the absence of studies of member experiences of transitions. Another gap existed in the study of informal and incidental learning in congregations, since while some previous research existed, the body of research needed strengthening and expanding through additional studies. Finally, almost no research existed on individual member experiences during congregational pastoral transitions. This study fills some of these gaps and provides evidence that theories of incidental and informal learning are evidenced by member experiences during leadership transitions, by member experiences in churches beyond just the leadership transition period, and provides rich data exploring how members report learning, feeling, and acting during pastoral transitions.

However, gaps in the research remain. Longer term research on the learning, stability and functioning of congregations pre- and post- transitions would aid those working in church health and renewal to understand the impact of pastoral transitions and design interventions to provide for the best possible health and functioning throughout. Research in these areas could help answer the question of whether the congregations as whole organizations can be said to have learned from the transition experience, and if so, how this learning as a whole organization could be facilitated and supported to work for greater organizational health. Further research could tease out whether habits of reflection built into congregational life through bible study and other small group opportunities increase learners' abilities to surface and process their informal and incidental learning.

Further studies should include large churches, nondenominational churches, those from the historically African-American denominations in the United States, and those from newer church traditions associated with various immigrant groups newer to the United States. A wider array of theological orientations would be advantageous. Studies in these contexts could explore whether patterns of informal and incidental learning in congregations, and during pastoral transitions, differ by race, theology, denominational affiliation (or non-affiliation) or church size. Another area for research could delve into the differences in learning in congregations by involvement level of members. This would aid churches and those who work with them to develop learning facilitation methods that are responsive to the reality that all members are not equally involved. Finally, studies using psychological capital or other measures of learning capacity as one variable while exploring levels of informal learning in congregants could provide vital information on the impact of learning capacity on congregational life.

Chapter Summary

The purpose of this study was to examine the informal and incidental learning of active congregants and whole congregations, in three Christian congregations, dissimilar in structure, demographics, and theology, as the congregations experience a pastoral transition during the period between the exit of a lead pastor and the employment of a successor. The research questions guiding this study were:

1. What informal learning occurs in congregants and congregations as they experience leadership transition?
2. What incidental learning occurs in congregants and congregations as they experience leadership transition?
3. What roles do organizational characteristics such as structure, demographics, and stated theology play in the informal and incidental learning experiences of congregants during leadership transition?

This study focused on the presence, content, and dimensions of learning in congregants and in the congregations as whole organizations, and probed the influence of organizational characteristics on learning.

Congregants reported experiences of informal and incidental learning during the transition that ranged from the simple to profound. They learned about their congregation, their denomination, their faith and their selves. Some learned about the roles and responsibilities of pastors and how a search process operated in their tradition. They learned through their own experiences, through interacting with other members, and through church events and communications. Certain types of informal and incidental learning appeared to correlate with particular congregational characteristics, including two of the three characteristics identified in

the research question: structure and stated theology; and three additional characteristics: size, denominational affiliation, and the processes and language used during the transition

These congregants and their stories reinforced that religious practice is a source of informal learning. Participants learned without any formal teachers or learning structures. Their learning was grounded in context, and influences of each unique setting on their learning was observed. Congregants sought out learning, and their learning was particularly meaningful when they tried to make sense of a situation or on topics they felt strongly about. Some congregants only realized their learning as they reflected on it prior to or during our interviews. Learning was typically transactional, rather than transformative, with little effect on pre-existing frames of reference. While this study was limited to less than a year spent with each congregation, longer-term studies could perhaps demonstrate more dimensions and nuances of this learning over time, and observe any long term effects of transitional learning on the congregation.

Learning in congregations experiencing pastoral transition could be supported and guided through processes and structures providing opportunities for critical reflection and collective meaning-making. Facilitated and supported learning could increase practical and spiritual learning and skills for transition and change. Further work in this area, such as designing templates or resources for processes and structures, could be of great benefit to congregations as they deal with the inevitable pastoral transitions that will come along.

Closing Words

While pastoral transition doesn't happen daily in congregations, it is inevitable in any congregation which exists beyond the tenure of its founding pastor. Additionally, other types of change and transition are constant in congregations and society as a whole. The world is always changing. Each new generation of people brings new characteristics into the church and the

communities churches seek to attract. Much has been written about the increasing decline in size and number of Christian congregations in the Western world. Congregations that cannot change and adapt will die. Christians who cannot change and learn will be unable to carry the faith into the future. Like the Disciples, who struggled to adapt after Jesus' death and resurrection, with the added challenge of struggling to understand much of the wisdom He had left with them, churches are charged with continuing on after the loss of one teacher to continue to spread the good news of their faith through the life of the church.

While transition and change can provide profound experiences of learning and transformation for those deeply involved, and a few participants' stories told of such experiences, much of the learning during pastoral transition was not in any way profound or transformative, simply adding to member information on how a congregation works or, when they attempted to make meaning beyond the transactional, simply reinforcing their existing frames of belief. Providing structures to support and facilitate learning during congregational change could focus on building skills for change and adaptation, and encouraging the potential for transformation through their experiences within the church, thus equipping congregants to better handle change whenever it comes. If any form of church is to survive into the future, Christians who are able to handle change and harness it for real learning and transformation will be crucial to that survival. It is my hope that this research provides at least a small amount of material for envisioning, building, and strengthening congregations that create just those Christians, ready to face change and transition with open minds and tools for learning, who will lay the foundation for Christianity to survive and thrive in the coming years, decades, and beyond.

REFERENCES

- Adams, T. (1998). Transition success factors. *Nonprofit World*, 16(3), 48-52.
- Adams, T. (2004). Capturing the power of leadership change: Using executive transition management to strengthen organizational capacity. Retrieved from www.aecf.org/upload/publicationfiles/pb3622h312.pdf.
- Ahearne, M., Lam, S. K., Mathieu, J. E., & Bolander, W. (2010). Why are some salespeople better at adapting to organizational change? *Journal of Marketing*, 74(3), 65-79.
- Allen, M. P., Panian, S. K., & Lotz, R. E. (1979). Managerial succession and organizational performance: A recalcitrant problem revisited. *Administrative Science Quarterly*, 24(2), 167-180.
- Allison, M. (2002). Into the fire: Boards and executive transitions. *Nonprofit Management & Leadership*, 12(4), 341-351.
- Alonderienė, R., & Pundzienė, A. (2008). The significance of formal, informal and non-formal learning for the acquisition of the change management competence. *Vocational Education: Research & Reality*, (15), 173-180.
- Altheide, D., Coyle, M., DeVriese, K., & Schneider, C. (2008). Emergent qualitative document analysis. In S. Nagy Hesse-Biber & P. Leavy (Eds.), *Handbook of emergent methods* (pp. 571-600). New York, NY: Guilford Press.
- Amis, J. M., & Silk, M. L. (2008). The philosophy and politics of quality in qualitative organizational research. *Organizational Research Methods*, 11(3), 456-480.

- Arant, J. R. (2010). *A resource for Assemblies of God staff pastors who experience abrupt senior pastor transition*. (Doctoral Dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 856900850)
- Argyris, C. (1952). *Executive leadership*. New York, NY: Harper & Brothers.
- Argyris, C., & Schön, D. (1978). *Organizational learning: A theory of action perspective*. Reading, MA: Addison-Wesley.
- Argyris, C., & Schön, D. A. (1996). *Organizational learning II: Theory, method and practice*. Reading, MA: Addison-Wesley.
- Asimov, I. (1978). My own view. In R. Holdstock (Ed.), *The encyclopedia of science fiction* (p. xii). London, UK: Octopus Books.
- Attride-Stirling, J. (2001). Thematic networks: An analytical tool for qualitative research. *Qualitative Research, 1*(3), 385-405.
- Barnes, S. L. (2005). Black church culture and community action. *Social Forces, 84*(2), 968-994.
- Balan, B. N. (2005). Multiple voices and methods: Listening to women who are in workplace transition. *International Journal of Qualitative Methods, 4*(4), 1-21.
- Barnes, S. L. (2005). Black church culture and community action. *Social Forces, 84*(2), 968-994.
- Bear, D.J., Tompson, H.B., Morrison, C.L., Vickers, M., Paradise, A., Czarnowsky, M., Soyars, M., & King, K. (2008). *Tapping the potential of informal learning: An ASTD research study*. Alexandria, VA: American Society for Training and Development.
- Beatty, P. T. & Hayes, M. J. (1989) Religious institutions. In S. B. Merriam & P. M. Cunningham (Eds.), *The handbook of adult and continuing education* (pp. 397- 409). San Francisco, CA: Jossey-Bass.

- Beatty, R. P., & Zajac, E. J. (1987). CEO change and firm performance in large corporations: Succession effects and manager effects. *Strategic Management Journal*, 8(4), 305-317.
- Beckett, D., & Hager, P. (2000). Making judgments as the basis for workplace learning: Towards an epistemology of practice. *International Journal of Lifelong Education*, 19, 300-311.
- Beckett, D. & Hager, P. (2002). *Life, work and learning: Practice in postmodernity*. London, UK: Routledge.
- Beilenson, J. (2005). Coping with leadership transitions in community-building organizations. *National Civic Review*, 94(4), 47-48.
- Bierema, L. L. (1999). The process of the learning organization: Making sense of change. *NASSP Bulletin*, 83(604), 46-57.
- Billett, S. (2001). Participation and continuity at work: A critique of current workplace learning discourses. Context, power and perspective: Confronting the challenges to improving attainment in learning at work. Joint Network/SKOPE/TLRP International workshop 8-10th November 2001, Sunley Management Centre, University College of Northampton. Retrieved from http://www.infed.org/archives/e-texts/billett_workplace_learning.
- Bogdan, R. C., & Biklen, S. (2006). *Qualitative research in education. An introduction to theory and methods* (5th Ed.). Boston, MA: Pearson.
- Bolt, S. (2008). Synchronizing formal and informal learning in the workplace to enhance professional development. *International Journal of Learning*, 15(4), 57-65.
- Boud, D., Rooney, D., & Solomon, N. (2009). Talking up learning at work: Cautionary tales in co-opting everyday learning. *International Journal of Lifelong Education*, 28(3), 323-334.

- Bowen, G. A. (2008). Naturalistic inquiry and the saturation concept: A research note. *Qualitative Research*, 8(1), 137-152.
- Bridges, W. (1988). *Surviving corporate transitions*. New York: Doubleday.
- Bridges, W. (2004). *Transitions: Making sense of life's changes*. Cambridge: Da Capo Press.
- Brockett, R. G. & Hiemstra, R. (1991). A conceptual framework for understanding self-direction in adult learning. In *Self-direction in adult learning: Perspectives on theory, research, and practice* (pp. 18-33). London and New York: Routledge. Retrieved from http://www.infed.org/archives/e-texts/hiemstra_self_direction.htm
- Brookfield, S. D. (1981). Independent adult learning. *Studies in Adult Education*, 13, 15-27.
- Brown, J. S. & Duguid, P. (1991). Organizational learning and communities of practice: Towards a unified view of working, learning, and innovation. *Organization Science*, 2(1): 40-57.
- Buozite-Rafanaviciene, S., Pundziene, A., & Turauskas, L. (2009). Relation between the attributes of executive successor and organizational performance. *Inzinerine Ekonomika-Engineering Economics*, (2), 65-74.
- Bussye, V., Wesley, P., & Able-Boone, H. (2001). Innovations in professional development: Creating communities of practice to support inclusion. In M.J. Guralnick (Ed.), *Early childhood inclusion: Focus on change* (pp. 179-200). Baltimore, MD: Paul H. Brookes.
- Cairns, T. (2000). For the sake of informality. *Adults Learning*, 12(3), 16-18.
- Candy, P. C. (1991) *Self-direction for lifelong learning*. San Francisco, CA: Jossey-Bass.
- Cao, Q., Maruping, L. M., & Takeuchi, R. (2006). Disentangling the effects of CEO turnover and succession on organizational capabilities: A social network perspective. *Organization Science*, 17(5), 563-576.

- Carroll, G. R. (1984). Dynamics of publisher succession in newspaper organizations. *Administrative Science Quarterly*, 29(1), 93-113.
- Charmaz, K. (2002). Qualitative interviewing and grounded analysis. In J. Gubrium & J. A. Holstein (Eds.), *Handbook of interview research* (pp. 675-694). Thousand Oaks, CA: SAGE Publications, Inc.
- Cherrington, R., & Van Ments, M. (1994). Pinning down experiential learning. *Studies in the Education of Adults*, 26, 15-30.
- Cho, J. & Trent, A. (2006) Validity in qualitative research revisited. *Qualitative Research*, 6(3), 319-340
- Cohen, J. H. (2000). Problems in the field: Participant observation and the assumption of neutrality. *Field Methods*, 12(4), 316-333.
- Colardyn, D.& Bjornavold, J. (2005). The learning continuity: European inventory on validating non-formal and informal learning. National policies and practices in validating non-formal and informal learning. Retrieved from http://www.educacion.gob.es/educa/incual/pdf/rec/01_aprendizaje_contiuo.pdf.
- Colley, H., Hodkinson P., & Malcolm, J. (2002). Non-formal learning: mapping the conceptual terrain. A consultation report. Leeds: University of Leeds Lifelong Learning Institute. Retrieved from http://www.infed.org/archives/e-texts/colley_informal_learning.htm.
- Colley, H., Hodkinson P., & Malcolm, J. (2003). Informality and formality in learning: a report for the Learning and Skills Research Centre. London: Learning and Skills Research Centre. Retrieved from http://www.uk.ecorys.com/europeaninventory/publications/concept/lsrc_informality_for_mality_learning.pdf.

- Congregant. (2013). In *Merriam-Webster.com*. Retrieved from <http://www.merriam-webster.com/dictionary/congregant>.
- Crain, M. A., & Seymour, J. (1997). 'Thrashing in the night': Laity speak about religious knowing. *Religious Education*, 92(1), 38-53.
- Creswell, J. (1998). *Research design: Qualitative, quantitative, and mixed methods approaches* (2nd ed.). Thousand Oaks, CA: SAGE Publications, Inc.
- Crotty, M. (1998) *The foundations of social research: Meaning and perspective in the research process*. Thousand Oaks, CA: SAGE Publications, Inc.
- Cseh, M. (2002). Management learning and development in Central and Eastern Europe: The case of Romanian small business owner-managers. *Journal of Transnational Management Development*, 7(4), 55-71.
- Davidson, V. & Gravestock, R. (2012). CEO succession in Australia: The chief executive's first year. Retrieved from <http://www.booz.com/global/home/what-we-think/reports-white-papers/article-display/succession-australia-chief-executives-first>.
- Davis, D. C. (2007). Learning our way: Engaging laity through large-scale participatory action research. *Journal of Adult Theological Education*, 4(1), 48-62.
- Day, N. (1998). Informal learning. *Workforce*, 77(6), 30-36. Available at <http://www.workforce.com/apps/pbcs.dll/article?AID=/19980601/NEWS02/306019938#>.
- de Carteret, P. (2008). Diverse pleasures: Informal learning in community. *Australian Journal of Adult Learning*, 48(3), 502-521.
- Dechant, K. (1999). How managers learn in the knowledge era. *Advances in Developing Human Resources*, 1(3), 42-51.

- de Feijter, J.M., de Grave, W.S., Koopmans, R.P., Scherpbier, A. (2013). Informal learning from error in hospitals: what do we learn, how do we learn and how can informal learning be enhanced? A narrative review. *Advances in Health Sciences Education, 18*(4), 787-805.
- Denis, D. J., & Denis, D. K. (1995). Performance changes following top management dismissals. *The Journal of Finance, 1*(4), 1029-1057.
- Denzin, Norman K. (2009). The elephant in the living room: Or extending the conversation about the politics of evidence. *Qualitative Research, 9*(2), 139-160.
- Desikan, N. (2009) *Communities of practice for continuing professional education: A case study of educational consultants in India*. (Doctoral Dissertation). Retrieved from University of Georgia Electronic Theses and Dissertations. Available at http://www.galileo.usg.edu/express?link=getd&parms=query%3Did%3Auga_desikan_nalini_200905_phd.
- Detter, A. (2011). Transition at the top—senior pastoral change. An example to consider for transferrable concepts. Retrieved from <http://www.convergeworldwide.org/files/ww/resource/document/senior-pastor-transition.pdf>.
- Deutsch, C. P. (1981). The behavioral scientist: Insider and outsider. *Journal of Social Issues, 37*(2), 172-191.
- Dewey, J. (1997). *Experience and education*. New York, NY: Simon & Schuster. (Original work published 1938)
- Dickson-Swift, V., James E. L., Kippen, S. & Liamputtong, P. (2009). Researching sensitive topics: qualitative research as emotion work, *Qualitative Research, 9*(1), 61-79.

- Doerrer-Peacock, B. (2009). Transforming imagination through story and stained glass. *Journal of Adult Theological Education*, 6(2), 141-152.
- Domizi, D. P. (2008) *Learning in context: Exploring short- and long-term experiences situated in an informal learning environment*. (Doctoral Dissertation). Retrieved from University of Georgia Electronic Theses and Dissertations. Available at http://www.galileo.usg.edu/express?link=getd&parms=query%3Did%3Auga_domizi_denise_p_200805_phd.
- Doornbos, A. J., Simons, R., & Denessen, E. (2008). Relations between characteristics of workplace practices and types of informal work-related learning: A survey study among Dutch police. *Human Resource Development Quarterly*, 19(2), 129-151.
- Easterby-Smith, M., Araujo, L., & Burgoyne, J. (1999). *Organizational learning and the learning organization: Developments in theory and practice*. London, UK: SAGE Publications, Inc.
- Eisenhardt, K. M. (1989). Building theories from case study research. *The Academy of Management Review*, 14(4), 532–550.
- Ellinger, A. D. (2005). Contextual factors influencing informal learning in a workplace setting: The case of “Reinventing Itself Company.” *Human Resource Development Quarterly*, 16(3), 389–415.
- Ellinger, A. D. & Cseh, M. (2007). Contextual factors influencing the facilitation of others’ learning through everyday work experiences. *Journal of Workplace Learning*, 19(7), 435-452.
- Elyse, K. (2005). *The pastor, the people, and the protege: A grounded theory study of how senior evangelical pastors in West Africa impart leadership to the next generation of leaders*.

- (Doctoral Dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 305360583).
- Emerson, R. M., Fretz, R. I., & Shaw, L. L. (2001). Participant observation and field notes. In P. Atkinson, A. Coffey, S. Delamont, J. Lofland, and J. Lofland (Eds.), *Handbook of ethnography* (pp. 353-368). Thousand Oaks, CA: SAGE Publications, Inc.
- English, L. M. (1999a). Learning from changes in religious leadership: A study of informal and incidental learning at the parish level. *International Journal of Lifelong Education*, 18(5), 385-394.
- English, L. M. (1999b). Informal and incidental teaching strategies in lay-led parishes. *Religious Education*, 94(3), 300-312.
- English, L. M. (2000). Spiritual dimensions of informal learning. *New Directions for Adult & Continuing Education*, 2000(85), 29-38.
- Eraut, M. (2000) Non-formal learning, implicit learning and tacit knowledge. In F. Coffield (Ed.), *The necessity of informal learning* (pp. 18-31). Bristol: Policy Press.
- Eraut, M. (2004). Informal learning in the workplace. *Studies in Continuing Education*, 26(2), 247-273.
- Etherington, K. (2004). *Becoming a reflexive researcher: using our selves in research*. London, UK: Jessica Kingsley.
- European Commission on Lifelong Learning. (2001). Communication: Making a European area of lifelong learning a reality. Retrieved from <http://www.europa.eu.int/comm/education/life/index.htm>.
- Evans, K., Kersh, N. (2004) Recognition of tacit skills: Sustaining learning outcomes in adult learning and work re-entry. *Journal of Workplace Learning*, 16(1-2).

- Everist, N. C. (2001). Connecting the learning community and vocation in the public world. *Religious Education, 96*(3), 294-309.
- Fama, E. F. (1980). Agency problems and the theory of the firm. *Journal of Political Economics, 88*(2), 288–307.
- Farquhar, K. W. (1989). *Employee responses to external executive succession: Attributions and the emergence of leadership*. (Doctoral Dissertation). Retrieved from Proquest Dissertations & Theses A&I. (UMI No. 303730293).
- Farquhar, K. (1991). Leadership in limbo: Organization dynamics during interim administrations. *Public Administration Review, 51*(3), 202.
- Farquhar, K. W. (1995). Guest editor's note: Leadership transitions--current issues, future directions. *Human Resource Management, 34*(1), 3-10.
- Farquhar, K. (1996). Learning from the challenges of nonroutine executive transitions. *Academy of Management Best Papers Proceedings, 328-332*.
- Favaro, K., Karlsson, P. & Neilson, G. L. (2012). CEO succession 2011: The new CEO's first year. *strategy+business, (67)*, 1-10. Retrieved from http://www.booz.com/media/file/BoozCo_CEO-Succession-Study-2011-3.pdf
- Fenwick, T. J. (2000). Expanding conceptions of experiential learning: A review of the five contemporary perspectives of cognition. *Adult Education Quarterly, 50*(4), 243-272.
- Fenwick, T. J. (2003). *Learning through experience: Troubling orthodoxies and intersecting questions*. Melbourne, FL: Krieger Publishing.
- Fenwick, T. J., English, L. M., & Penwick, T. J. (2004). Dimensions of spirituality: A framework for adult educators. *Journal of Adult Theological Education, 1*(1), 49-64.

- Fewell, J. W. (2002). *Transformative learning: Insights into women seminarians' decisions to pursue ordination*. (Doctoral dissertation). Retrieved from OhioLINK ETD. Available at <http://etd.ohiolink.edu/send-pdf.cgi/Fewell%20Jilaine%20Wolcott.pdf?osu1228171442>.
- Fielding, N. (2010). Elephants, gold standards and applied qualitative research. *Qualitative Research, 10*(1), 123-127.
- Findsen, B. (2006). Social institutions as sites of learning for older adults: Differential opportunities. *Journal of Transformative Education, 4*(1), 65-81.
- Finkelstein, S. & Hambrick, D. C. (1996). *Strategic leadership: Top executives and their effects on organizations*. Minneapolis/St. Paul, MN: West.
- Fleischer, B. J. (2006). The ministering community as context for religious education: A case study of St. Gabriel's catholic parish. *Religious Education, 101*(1), 104-122.
- Foley, G. (1993). The neighbourhood house: Site of struggle, site of learning. *British Journal of Sociology of Education, 14*(1), 21-37.
- Fraenkel, J. R., & Wallen, N. E. (2006). *How to design and evaluate research in education* (6th ed.). Boston, MA: McGraw-Hill.
- Friedman, S. D., & Saul, K. (1991). A leader's wake: Organization member reactions to CEO succession. *Journal of Management, 17*(3), 619-642.
- Friedman, S. D., & Singh, H. (1989). CEO succession and stockholder reaction: The influence of organizational context and event content. *Academy of Management Journal, 32*(4), 718-744.
- Frost, N.A., Esin, C., Holt, A., Mehdizadeh, L. & Shinebourne, P. (2010). Pluralism in qualitative research: Consensual findings, individual interpretations. *Qualitative Research, 10*(4), 441-460.

- Gameson, W. A. & Scotch, N. A. (1964). Scapegoating in baseball. *American Journal of Sociology*, 70(1), 69-76.
- Gardner, G. (2001). Unreliable memories and other contingencies: problems with biographical knowledge. *Qualitative Research*, 1(2), 185-204.
- Garvin, D. A. (1993). Building a learning organization. *Harvard Business Review*, 71(4), 78-91.
- Gentry, R. J., Hurst, C., & Shen, W. (2006). Power and politics in relay CEO succession. In C. Schriesheim & L. Neider (Eds.), *Power and influence in organizations: New empirical and theoretical perspectives* (pp. 109-132). Greenwich, CT: Information Age Publishing.
- Gibbert, M. & Ruigrok, W. (2010). The 'what' and 'how' of case study rigor: Three strategies based on published research. *Organizational Research Methods*, 13(4), 710-737.
- Gilmore, T. (1988). *Making a leadership change*. San Francisco, CA: Jossey-Bass.
- Gilmore, T. (2012). The Importance of linking leadership succession, strategy, and governance. *Nonprofit Quarterly*. Retrieved from <http://nonprofitquarterly.org/governancevoice/21062-the-importance-of-linking-leadership-succession-strategy-and-governance.html>
- Gilmore, T., & Ronchi, D. (1995). Managing predecessors' shadows in executive transitions. *Human Resource Management*, 34(1), 11-26.
- Gorard, S., Fevre, R. & Rees, G. (1999). The apparent decline of informal learning. *Oxford Review of Education*, 25(4), 437-454
- Gordon, G. E. & Rosen, N. (1981). Critical factors in leadership succession. *Organizational Behavior and Human Performance*, 27(2), 227-254.
- Gouldner, A. W. (1954). *Patterns of industrial bureaucracy*. New York: Free Press.

- Grammich, C., Hadaway, K., Houseal, R., Jones, D. E., Krindatch, A., Stanley, R., & Taylor, R. H. (2012). *2010 U.S. Religion Census: Religious Congregations & Membership Study*. Association of Statisticians of American Religious Bodies. Retrieved from <http://www.rcms2010.org/>
- Greenberg, Jerald, and Robert A. Baron. 1995. *Behavior in Organizations*, 5th ed. Englewood Cliffs, N.J.: Prentice Hall.
- Greenblatt, M. (1983). Management succession: Some major parameters. *Administration in Mental Health*, 11(1), 3-10.
- Grusky, O. (1960). Administrative succession in large organizations. *Social Forces*, 39(2), 105-115.
- Guenther, K. M. (2009). The politics of names: Rethinking the methodological and ethical significance of naming people, organizations, and places. *Qualitative Research*, 9(4), 411-421.
- Guest, R. (1962). Managerial succession in complex organizations. *American Journal of Sociology*, 68(1), 47-56.
- Hakkarainen, K., Palonen, T., Paavola, S., & Lehtinen, E. (2004). *Communities of networked expertise: Professional and educational perspectives*. Amsterdam, NL: Elsevier.
- Hambrick, D. C. & Mason, P. A. (1984). Upper echelons: The organization as a reflection of its top managers. *Academy of Management Review*, 9(2), 193-206.
- Hammersley, M. (2010). *Methodology: Who needs it?* London, UK: Sage.
- Hargreaves, A. (2009). Leadership succession. *The Educational Forum*, 69, 163-173.

- Harrison, W. T. (2010). *How African American pastors learn the roles of ministry*. (Doctoral Dissertation). Retrieved from University of Georgia Electronic Theses and Dissertations. Available at http://www.galileo.usg.edu/express?link=getd&parms=query%3Did%3Auga_harrison_william_t_201008_edd
- Hartley, J. (2004). Case study research. In C. Cassell & G. Symon (Eds.), *Essential guide to qualitative methods in organizational research* (pp. 323-333). Thousand Oaks, CA: SAGE Publications, Inc.
- Hawkins, P. (1997). Organizational culture: Sailing between evangelism and complexity. *Human Relations*, 50(4), 417-440.
- Headland, T. N. & McElhanon, K. A. (2004). Emic/Etic Distinction. In M. S. Lewis-Beck, A. Bryman, & A. F. Liao, *The SAGE encyclopedia of social science research methods, Volume 1*. (p. 305). Thousand Oaks, CA: SAGE Publications, Inc.
- Heddy, B. C. & Pugh, K. J. (2015). Bigger is not always better: Should educators aim for big transformative learning events or small transformative experiences? *Journal of Transformative Learning*, 3(1), 52-58.
- Helmich, D. L. & Brown, W. B. (1972). Successor type and organizational change in corporate enterprise. *Administrative Science Quarterly*, 17(3), 371-381.
- Hernandez, C. M., & Leslie, D. R. (2001). Charismatic leadership. The aftermath. *Nonprofit Management & Leadership*, 11(4), 493-497.
- Hinden, D. R., & Hull, P. (2002). Executive leadership transition: What we know. *Nonprofit Quarterly*. Retrieved from <http://www.nonprofitquarterly.org/management/826-executive-leadership-transition-what-we-know.html>

- Hirji, N. (2006). Learning the sacred? *Journal of Adult Theological Education*, 3(1), 37-47.
- Johnson, J. L. (2009). The nonprofit leadership deficit—A case for more optimism. *Nonprofit Management & Leadership*, 19(3), 285-304.
- Johnson, P. G. (1983). Some reflections on "leading questions". *Review Of Religious Research*, 24(4), 357-361.
- Karaevli, A. (2007). Performance consequences of new CEO ‘outsiderness’: Moderating effects of pre- and post-succession contexts. *Strategic Management Journal*, 28(7), 681-706.
- Kasl, E., Marsick, V., & Dechant, K. (1997). Teams as learners: A research-based model of team learning. *Journal of Applied Behavioural Science*, 33(2), 227–246.
- Kelly, K. (2006). From encounter to text: Collecting data in qualitative research. In M. Terre Blanche, K. Durrheim & D. Painter (Eds), *Research in practice: Applied methods for the social sciences* (pp. 285-319). Cape Town, ZA: University of Cape Town Press.
- Kesner, I.F., & Sebor, T.C. (1994). Executive succession: Past, present, and future. *Journal of Management*, 20(2), 327-372.
- Kesner, I. F., & Dalton, D. R. (1994). Top management turnover and CEO succession: An investigation of the effects of turnover on performance. *Journal of Management Studies*, 31(5), 701-713.
- Kilpatrick, S. (2002). Learning and building social capital in a community of family farm businesses. *International Journal of Lifelong Education*, 21(5), 446-461.
- King, A. (2008). In vivo coding. In L. Given (Ed.), *The SAGE encyclopedia of qualitative research methods* (pp. 473-474). Thousand Oaks, CA: SAGE Publications, Inc.
- Koch, J. (1978). Managerial succession in a factory and changes in supervisory leadership patterns: A field study. *Human Relations*, 31(1), 49-58.

- Kolb, D. A. (1984). *Experiential learning: Experience as the source of learning and development*. Englewood Cliffs, NJ: Prentice-Hall.
- Kovan, J. T., & Dirkx, J. M. (2003). 'Being called awake': The role of transformative learning in the lives of environmental activists. *Adult Education Quarterly*, 53(2), 99.
- Kratz, C. G. (2008). *A pastor's transition into a congregation: An autoethnographic study* (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 304500801)
- Kvale, S. & Brinkman, S. (2009). *InterViews* (2nd Ed.). Thousand Oaks, CA: SAGE Publications, Inc.
- Labaree, R. V. (2002). The risk of "going observationalist": Negotiating the hidden dilemmas of being an insider participant observer. *Qualitative Research*, 2(1), 97-122.
- Lange, E. (2007). "Martyrs" and "spectators": Transformative theological learning through international travel seminars. *Journal of Adult Theological Education*, 4(1), 74-92.
- Lant, T. K., Milliken, F. J. & Batra, B. (1992). The role of managerial learning and interpretation in strategic persistence and reorientation: An empirical exploration. *Strategic Management Journal*, 13(8), 585-608.
- Lawrence, R. L. (2008). Powerful feelings: Exploring the affective domain of informal and arts-based learning. *New Directions for Adult and Continuing Education*, 2008(120), 65-77.
- Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. Cambridge, UK: Cambridge University Press.
- Lave, J., & Wenger, E. (1998). *Communities of practice: Learning, meaning, and identity*. Cambridge, UK: Cambridge University Press.
- Lewin, K. (1946). Action research and minority problems. *Journal of Social Issues*, 2(4), 34-46.

- Lewin, K. (1951). *Field theory in social science: Selected theoretical papers*. New York, NY: Harper & Row.
- Lewis, M. N. (2009). *Transformative learning in the multiple sclerosis (MS) community: An ethnographic study examining how and in what ways transformative learning is realized and lived out among members of an MS community* (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 305147656)
- Livingstone, D. W. (2001). Adults' informal learning: Definitions, findings, gaps, and future research. Retrieved from <https://tspace.library.utoronto.ca/retrieve/4484/21adultsinformallearning.pdf>
- Lohman, M. C. (2009). A survey of factors influencing the engagement of information technology professionals in informal learning activities. *Information Technology, Learning & Performance Journal*, 25(1), 43-53.
- Lohnes, P. G. (2008). *Leading while leaving: The role of a departing pastor in preparing a church for a healthy pastoral transition*. (Doctoral Dissertation). Retrieved from Proquest Dissertations & Theses A&I. (UMI No. 30480972).
- Loyd, R. (2009). *The adaptive work of Trinitarian leadership: A case study of pastoral transition*. (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 305170546)
- Lucier, C., Schuyt, R., & Spiegel, E. (2003). Deliver or depart: CEO succession 2002. *strategy+business*, (31), 32-45. Retrieved from <http://www.strategy-business.com/article/21700?gko=9f543>.

- Lucier, C., Schuyt, R., & Tse, E. (2005). CEO succession 2004: The worlds' most prominent temp workers. *strategy+business*, (39), 1-16. Retrieved from www.strategy-business.com/press/article/05204.
- Luckie, J. A. C. (2005). Life journeys: Awakenings and learning experiences. *New Directions for Adult & Continuing Education*, 2005(108), 69-78.
- Luthans F, Youssef, C.M., Avolio, B.J. (2007). *Psychological capital*. New York: Oxford University Press.
- Macqueen, K. M., McLellan, E., Metzger, D. S., Kegeles, S., Strauss, R. P., Scott, R., et al. (2001). What is community? An evidence-based definition for participatory public health. *American Journal of Public Health*, 91(12), 1929–1938.
- Mahmood, N. & Hasnaa, N. (2005). The relationship between factors on informal learning and transfer of learning of managerial knowledge and skills among head nurses in two government hospitals in Kelantan. *OAIster*, EBSCOhost. Retrieved from http://psasir.upm.edu.my/6446/1/FPP_2005_13%281-24%29.pdf.
- Manuti, A., Pastore, S., Scardigno, A. F., Giancaspro, M. L. and Morciano, D. (2015), Formal and informal learning in the workplace: a research review. *International Journal of Training and Development*, 19, 1–17.
- Marsick, V., Nicolaidis, A., & Watkins, K. (2014). Adult learning theory and application in human resource and organization development. In N. Chalofsky, T. Rocco & L. Morris (Eds.), *The handbook of HRD: Theory and application*. San Francisco: Jossey-Bass.
- Marsick, V. J., Volpe, M., & Watkins, K. E. (1999). Theory and practice of informal learning in the knowledge era. *Advances in Developing Human Resources*, 1(3), 80.

- Marsick, V. J. & Watkins, K. (1990). *Informal and incidental learning in the workplace*. London, UK: Routledge.
- Marsick, V. J. and Watkins, K. E. (1994), The learning organization: An integrative vision for HRD. *Human Resource Development Quarterly*, 5, 353–360.
- Marsick, V., & Watkins, K. (1997). Lessons from informal and incidental learning. In P. Burgoyne & M. Reynolds (Eds.), *Management learning: Integrating perspectives in theory and practice* (pp. 295-311). London: McGraw-Hill.
- Marsick, V. J., & Watkins, K. E. (2001). Informal and incidental learning. *New directions for Adult and Continuing Education*, 2001(89), 25-34.
- Marsick, V. J., & Watkins, K. E. (2003). Demonstrating the value of an organization's learning culture: The dimensions of learning organizations questionnaire. *Advances in Developing Human Resources*, 5(2), 132–151
- Marsick, V. J., & Watkins, K. E. (2014). Informal learning in learning organizations. In R. Poell, T. Rocco, & G. Roth (Eds.), *Routledge companion to HRD* (pp. 236-248). New York: Routledge.
- Maxwell, J. A. (2005). *Qualitative research design: An interactive approach* (2nd ed.). Thousand Oaks, CA: SAGE Publications, Inc.
- McCambridge, R. (2013). The papacy's lessons for succession planning? *Nonprofit Quarterly*. Retrieved from <http://www.nonprofitquarterly.org/policysocial-context/21887-the-papacy-s-lessons-for-succession-planning.html>
- McClory, R. (1998). Strategy eases shift from old pastor to new. *National Catholic Reporter*, 34(34), 6.

- McDermott, R. (1999). Why information technology inspired but cannot deliver knowledge management. *California Management Review*, 41(4), 103-117.
- McDermott, R. (2001). *Knowing in community: 10 critical success factors in building communities of practice*. Retrieved from <http://www.co-i-l.com/coil/knowledge-garden/cop/knowing.shtml>
- McGivney, V. (1999). *Informal learning in the community: A trigger for change and development*. Leicester: National Institute of Adult and Continuing Education.
- McLellan, E., MacQueen, K. M., & Neidig, J. L. (2003). Beyond the qualitative interview: Data preparation and transcription. *Field Methods*, 15(1), 63-84.
- McMillan, David W., & Chavis, David M. (1986). Sense of community: A definition and theory. *Journal of Community Psychology*, 14, 6-23.
- Mercer, J. A. (2006). Transformational adult learning in congregations. *Journal of Adult Theological Education*, 3(2), 163-178.
- Merriam, S. B. (1998). *Qualitative research and case study applications in education*. San Francisco, CA: Jossey Bass.
- Merriam, S. B. (2002). *Qualitative research in practice: Examples for discussion and analysis*. San Francisco, CA: Jossey-Bass.
- Merriam, S. B. (2009). *Qualitative research: A guide to design and implementation*. San Francisco, CA: Jossey-Bass.
- Merriam, S. B., Caffarella, R. S., & Baumgartner, L. (2007). *Learning in adulthood : A comprehensive guide* (3rd ed.). San Francisco, CA: Jossey-Bass.
- Merriam, S. B., & Clark, M. C. (1993). Learning from life experience: What makes it significant? *International Journal of Lifelong Education*, 12(2), 129-138.

- Merriam, S. B., Courtenay, B., & Baumgartner, L. (2003). On becoming a witch: Learning in a marginalized community of practice. *Adult Education Quarterly*, 53(3), 170-188.
- Merriam, S. B., & Simpson, E. L. (2000). *A guide to research for educators and trainers of adults* (2nd ed.). Malabar, FL: Krieger.
- Meyer, C. B. (2001). A case in case study methodology. *Field Methods*, 13(4), 329–352.
- Mezirow, J. (2000) Learning to think like an adult. In J. Mezirow and Associates (Eds.) *Learning as transformation* (pp. 3-33). San Francisco, CA: Jossey-Bass.
- Neighborhood Reinvestment Corporation (1998). *Managing Executive Transitions*. Retrieved from www.nw.org/network/pubs/studies/documents/handbook.pdf
- Nonaka, I. (1991) The knowledge-creating company. *Harvard Business Review*, 69(6), 96-104.
- Panosh, James Gerald. (2008). *Learning organization attributes and organizational performance: Is there a relationship in church congregations?* (Doctoral Dissertation). Retrieved from ProQuest Dissertations Publishing. (3324343).
- Parrino, R. (1997). CEO turnover and outside succession: A cross-sectional analysis. *Journal of Financial Economics*, 46, 165–197.
- Parrish, M. M., & Taylor, E. W. (2007). Seeking authenticity: Women and learning in the catholic worker movement. *Adult Education Quarterly*, 57(3), 221-247.
- Perrin, C., & Marsick, V. (2012) *The reinforcement revolution: How informal learning makes training real*. Tampa, FL: AchieveGlobal.
- Pfeffer, J. (1981). *Power in organizations*. Marshfield, MA: Pitman.
- Plato. (1997). *Cratylus*. In J. M. Cooper (Ed.), *Plato, Complete Works*. (pp. 101-156). Indianapolis, IN: Hackett.

- Powell, L. C. (2007). *An ethnographic case study of transformative learning in leadership development*. (Doctoral Dissertation). Retrieved from Proquest Dissertations & Theses A&I. (UMI No.304726732).
- Prange, C. (1999). Organizational learning – desperately seeking theory? In M. Easterby-Smith, L. Araujo & J. Burgoyne (Eds.), *Organizational learning and the learning organization* (pp. 23-43). London, UK: Sage.
- Price, E. (2004). Cognitive complexity and the learning congregation. *Religious Education*, 99(4), 358-370.
- Prior, L. (2003). *Using documents in social research*. London, UK: SAGE Publications, Inc.
- Pruitt, D. (2004). *Bragging rights: Informal learning and self-development of women in the leisure context of the Bicycle Ride Across Georgia (BRAG)*. (Doctoral Dissertation). Retrieved from University of Georgia Electronic Theses and Dissertations. Available at http://www.galileo.usg.edu/express?link=getd&parms=query%3Did%3Auga_pruitt_dena_w_200405_edd
- Rhodes, C. (1996). Researching organisational change and learning: A narrative approach. *The Qualitative Report*, 2(4). Retrieved from <http://www.nova.edu/sss/QR/QR2-4/rhodes.html>
- Roulston, K. (2010). *Reflective interviewing: A guide to theory and practice*. Thousand Oaks, CA: SAGE Publications, Inc.
- Rowley, J. (2002). Using case studies in research. *Management Research News*, 25(1), 16-27.
- Sandlin, J. A. & Bey, G. J. (2006). From critical vision to critical practice: Exploring the process of critical transformational learning among archaeologists. *Studies in the Education of Adults*, 38(1), 48-63.

- Salomon, G. (1993) No distribution without individuals' cognition: A dynamic interactional view. In G. Salomon (Ed.), *Distributed cognitions—Psychological and educational considerations* (pp. 111-138). Cambridge, UK: Cambridge University Press.
- Salomon, G. & Perkins, D. N. (1998) Individual and social aspects of learning. *Review of Research in Education*, 23, 1-24.
- Sandlin, J.A. & Bey, G. J. (2006). From critical vision to critical practice: Exploring the process of critical transformational learning among archaeologists. *Studies in the Education of Adults*, 38(1), 48-63.
- Saunders, E. (2011). *Communicating critical events: CEO transitions and the risk to enterprise value*. Retrieved from <http://www.fticonsulting.com/global2/media/collateral/united-states/ceo-transitions-and-the-risk-to-enterprise-value-study.pdf>
- Sawchuk, P. H. (2008). Theories and methods for research on informal learning and work: Towards cross-fertilization. *Studies in Continuing Education*, 30(1), 1-16
- Schlager, M. S. & Fusco, J. (2004). Teacher professional development, technology, and communities of practice: Are we putting the cart before the horse? *The Information Society*, 19(3), 203-220. Retrieved from www.tappedin.org/publications/2004/SchlagerFuscoTPD.pdf
- Schlossberg, N. (1995). *Counseling adults in transition: Linking practice with theory*. New York: Springer Publishing Company, Inc.
- Schön, D. (1983). *The reflective practitioner. How professionals think in action*. London: Temple Smith.

- Schugurensky, D. (2000). The forms of informal learning: Towards a conceptualization of the field. (NALL Working Paper #19 -2000). Retrieved from <https://tspace.library.utoronto.ca/bitstream/1807/2733/2/19formsofinformal.pdf>.
- Seidman, I. (2006). *Interviewing as qualitative research: A guide for researchers in education and the social sciences* (3rd ed.). New York: Teachers College Press.
- Senge, P. M. (1990). *The fifth discipline: The art and practice of the learning organization*. London, UK: Random House.
- Shen, W., & Cannella, A. A., Jr., (2002). Revisiting the performance consequences of CEO succession: The impacts of successor type, postsuccession senior executive turnover, and departing CEO tenure. *Academy of Management Journal*, 45(4), 717–733.
- Simons, H. (2009) *Case study research in practice*. London, UK: SAGE Publications, Inc.
- Smith, M. K. (2001) Learning in organizations. Infed. Retrieved from <http://www.infed.org/biblio/organizational-learning.htm>
- Stake, R. E. (1995). *The art of case study research*. Thousand Oaks, CA: SAGE Publications, Inc.
- Stern, E. & Sommerlad, E. (1999). *Workplace learning, culture and performance*. London, UK: Institute of Personnel and Development.
- Straka, G. (2004) *Informal learning: genealogy, concepts, antagonisms and questions*. Bremen: Institut Technik und Bildung, Universitat Bremen. Retrieved from http://unip-net.org/fileadmin/Download/publikationen/forschungsberichte/fb_15_04.pdf
- Strauss, A., & Corbin, J. (1990). *Basics of qualitative research: Grounded theory procedures and techniques*. Newbury Park, CA: SAGE Publications, Inc.

- Strober, M. H. (1990). Human capital theory: Implications for HR managers. *Industrial Relations*, 29(2), 214–239.
- Tannenbaum, S., Beard, R., McNall, L.A., Salas, E. (2010). Informal learning and development in organizations. In S. Kozlowski & E. Salas (Eds.), *Learning, Training, and Development in Organizations* (pp. 303-331). New York: Routledge.
- Theus, K. T. (1995). Communication in a power vacuum: Sense-making and enactment during crisis-induced departures. *Human Resource Management*, 34(1), 27-49.
- Tierney, T. J. (2006) The leadership deficit. *Stanford Social Innovation Review*. Retrieved from http://www.ssireview.org/articles/entry/the_leadership_deficit
- Tough, A. (1971). *The adult's learning projects*. Toronto: Ontario Institute for Studies in Education.
- Tyler, C. (2005). Metaphor and management: Making sense of change. *Management in Education*, 19(3), 28-32.
- Valentine, D. (2011). Maintaining organization culture through leadership succession planning. *Culture & Religion Review Journal*, 2011(2), 125-129.
- Virany, B., Tushman, M. L., Romanelli, E. (1992). Executive succession and organization outcomes in turbulent environments: An organizational learning approach. *Organization Science*, 3, 72–91.
- Vygotskiĭ, L. S., & Cole, M. (1978). *Mind in society: The development of higher psychological processes*. Cambridge, MA: Harvard University Press.
- Wallace, W. S. (2007). *Portraits: Discovering art as a transformative learning process at mid-life*. (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 304811241).

- Watkins, K. E., & Marsick, V. J. (1993). *Sculpting the learning organization: Lessons in the art and science of systemic change*. San Francisco, CA: Jossey-Bass.
- Watkins, K.E. & Marsick, V.J. (2010). Group and organizational learning. In C.E. Kasworm, A.D. Rose, & J.M. Ross-Gordon, (Eds.), *Handbook of adult and continuing education* (pp.59-70). Thousand Oaks, CA: Sage.
- Weiner, N. & Mahoney, T. (1981). A model of corporate performance as a function of environmental, organizational, and leadership influences. *Academy of Management Journal*, 24(3), 453-470.
- Wenger, E. (1998). Communities of practice. Learning as a social system. *Communities of Practice*. Retrieved from <http://www.co-i-l.com/coil/knowledge-garden/cop/lss.shtml>
- Wenger, E. (2006). Communities of practice: A brief introduction. Retrieved from <http://www.ewenger.com/theory/>.
- Wenger, E., McDermott, R. A., & Snyder, W. (2002). *Cultivating communities of practice : A guide to managing knowledge*. Boston, MA: Harvard Business School Press.
- Westen, D., Blagov, P. S., Harenski, K., Kilts, C. & Hamann, S. (2006). Neural bases of motivated reasoning: An fMRI study of emotional constraints on partisan political judgment in the 2004 U.S. presidential election. *Journal of Cognitive Neuroscience*, 18(11), 1947-1957.
- Wheeler, M. E. (2008). *The leadership succession process in megachurches*. (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 219984481)
- White, L. A. (2005). Making sense of adult learning: Experiential learning. *New Horizons in Adult Education*, 19(4), 31-41.

- Wiersema, M. F. (1995). Executive succession as an antecedent to corporate restructuring. *Human Resource Management, 34*(1), 185-202.
- Woffard, M. G. (2011). Examining the influence of frames of reference on flight instructors' process of informal learning in an aviation setting. (Doctoral Dissertation). Accessed at https://www.ideals.illinois.edu/bitstream/handle/2142/24085/Wofford_Michael.pdf?sequence=1.
- Woffard, M. G., Ellinger, A. D., & Watkins, K. E. (2013). Learning on the fly: Exploring the informal learning processes of aviation instructors. *Journal of Workplace Learning, 25*(2), 79-97.
- Wolfred, T. (2005) Stepping up: A board's challenge in leadership transition. *Nonprofit Quarterly, 9*(4). Retrieved from <http://www.nonprofitquarterly.org/governancevoice/825-stepping-up-a-boards-challenge-in-leadership-transition.html>
- Wolfred, T. (2008). *Building leaderful organizations: Succession planning for nonprofits. Executive transition monograph series, vol. 6*. Baltimore, MD: The Annie E. Casey Foundation. Retrieved from http://www.compasspoint.org/sites/default/files/docs/research/526_buildingleaderfulorganiza.pdf
- Wright, C. T. (2009) *Stories told: Using narrative tools during a time of pastor transition at South Congregational Church, United Church of Christ, Middletown, Connecticut*. (Doctoral dissertation). Retrieved from ProQuest Dissertations & Theses A&I. (UMI No. 304889515)

- Yelich Biniecki, S. M. (2015). Adults' perceptions of knowledge construction as participants in nonformal world affairs programs: An interpretive study. *Adult Education Quarterly*, 65(2), 116-132.
- Yin, R. K. (2009). *Case study research: Design and methods* (4th ed.). Thousand Oaks CA: SAGE Publications, Inc.
- Zajac, E. J. (1990). CEO selection, succession, compensation, and firm performance: A theoretical integration and empirical analysis. *Strategic Management Journal*, 11(3), 217-230.
- Zhang, Y. & Rajagopalan, N. (2004). When the known devil is better than an unknown god: An empirical study of the antecedents and consequences of relay CEO successions. *Academy of Management Journal*, 47(4), 483-501.
- Ziegler, M. (1999). "Awakening": Developing learning capacity in a small family business. In V. Marsick & M. Volpe (Eds.), *Informal learning on the job* (pp. 52-65). Williston, VT: Berrett-Koehler.