



Pilot Project
FINAL REPORT

Submitted by the Coordinating Committee

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INTRODUCTION

New Dreams/New Visions (NDNV), conceived by a small task force in Lent of 2009 and developed and tested in a pilot project over the next three and a half years, has good news for the challenging times we face in the Episcopal Church. It is no secret that we — and most U.S. mainline Protestant Churches — face continuing overall loss of membership and its consequences. And while there are Episcopal churches that are large and growing, substantially more are shrinking. From 2009 to 2012, according to the Episcopal Church’s “Domestic Fast Facts Trends,” congregations with an average Sunday attendance of 100 or less ranged between 67 and 68 percent. Small congregations have become the norm, and their percentage will continue to grow over the next five years. They face many challenges, but among the most critical is the difficulty of paying full-time clergy. Increasingly, they are unable to fund a full-time priest and are forced to transition to part-time clergy. At the same time, it is also true that as the baby boomers reach retirement age, the pool of retired clergy interested in part-time ministry is increasing.

In 2009, NDNV asked: How can we help these small, vibrant churches scattered throughout the United States embrace a new vision? How can we offer this growing pool of experienced clergy a new dream for ministry in their retirement?

Working with a targeted group of clergy and congregations over three-and-a-half years, the NDNV Pilot Project developed models of support and care for congregations moving from full-time to part-time clergy. They sought out retired and retiring clergy and worked with them on new ways of serving a congregation. They learned that small congregations are often vibrant, faithful communities serving their area and proclaiming the love of God in Christ. They saw that with help and support, clergy and congregations can move from an old model of “being gathered around the minister” to “being gathered around the ministry.” They tested

Ministry Tools and found them helpful to diocesan staff, clergy and congregational leaders. Good news for challenging times, indeed.



NDNV could not have happened without the financial support of dioceses and organizations that recognized the need for a coordinated approach to serving small congregations transitioning to part-time clergy leadership. We are grateful to the Episcopal dioceses of Delaware, Eastern Michigan, Long Island, Maine, and Vermont; our pilot dioceses; and the Office for Transition Ministry of the Episcopal Church, the Roanridge Foundation, Church Pension Group, and Transition Ministry Conference for providing the financial resources needed to complete the NDNV Pilot Project.

We give thanks also for the vision and commitment of the NDNV Coordinating Committee: Mr. Donald Romanik and Canon Jill Mathis, co-chairs; and the Rev. Thaddeus Bennett, the Rev. Pat Coller, the Rev. Victoria Duncan, the Rev. Mike Ehmer, The Rev. Laura Queen, Ms. Lynn Schmissrauter, the Rev. Matthew Stockard, and the Rev. Walter Taylor, members.

2009–2012 A BRIEF HISTORY OF THE NDNV PILOT PROJECT

New Dreams/New Visions grew out of a small task force formed in Lent of 2009 mostly from the Episcopal Church's Transition Ministry Conference (TMC) made up of Diocesan Transition Ministers from 44 dioceses. Task force members were acutely aware of the challenges faced by increasing numbers of small Episcopal congregations no longer able to fund full-time clergy positions, as well as the expanding pool of retired Episcopal clergy interested in some form of active ministry. They began discussing a creative approach that would help small congregations transition to part-time clergy and match them with retired clergy interested in active part-time ministry.

In June, the task force convened a 24-hour conference of representatives from the Church Pension Group (CPG), CREDO, the Episcopal Church Foundation (ECF), Fresh Start, Bishops, Diocesan Transition Ministers, and the Episcopal Church Center's Mission Leadership Center and Church Deployment Office. Participants worked on funding and development for a three-year pilot project — New Dreams/New Visions (NDNV) — that would provide transition tools for congregations moving to part-time clergy and help connect them with retired clergy interested in part-time ministry.

Conference participants created a coordinating committee that included co-chairs, Mr. Donald Romanik (ECF) and Canon Jill Mathis (Diocese of Pennsylvania); and members, the Rev. Thaddeus Bennett (Diocese of Vermont), the Rev. Pat Coller (CPG), the Rev. Victoria Duncan (Office for Transition Ministry), the Rev. Mike Ehmer (CREDO/Fresh Start and Diocese of Northwest Texas from 2012), Ms. Lynn Schmissrauter (Diocese of East Tennessee), the Rev. Laura Queen (CPG), the Rev. Matthew Stockard (Diocese of East Carolina), and the Rev. Walter Taylor (CPG). ECF served as fiduciary agent.

Financial support was provided by the dioceses of Delaware, Eastern Michigan, Long Island, Maine, and Vermont; the Office for Transition Ministry (Episcopal Church

Center); participating pilot dioceses; the Roanridge Foundation, Church Pension Group; and Transition Ministry Conference.

At its first annual meeting in December of 2009, the Coordinating Committee developed four broad goals and a timeline for the pilot phase of NDNV. These original goals were:

- Work with a targeted group of clergy and congregations
- Engage in a deliberate, thoughtful process to develop healthy models of congregational ministry with lay leaders working in partnership with part-time clergy
- Provide resources and training to enhance existing diocesan transition processes
- Develop research, data, and information to benefit transitions in the Church

By March of 2010, six dioceses — Atlanta, Eastern Michigan, Oklahoma, Southwest Florida, Vermont, and Western Massachusetts — had been invited to participate as pilot dioceses.

In June work began in two critical areas: development of assessment tools for congregations and clergy, and recruitment of clergy who were retired or preparing to retire and interested in part-time ministry. Because of the greater demands of the active development phase of the pilot, the Coordinating Committee created a part-time paid position, NDNV Project Coordinator. Thad Bennett was hired to serve in that capacity.

Over the next six months, Bennett worked with Diocesan Transition Ministers from the pilot dioceses. Resources were created for congregations transitioning to part-time clergy and strategies were developed to build participation from congregations and clergy. The NDNV logo and basic design templates, a variety of materials and forms, and the New Dreams/New Visions website — a gathering place for information and a marketing tool — were completed and in place by the second Coordinating Committee meeting in December of 2010.

With the initial startup underway, the Committee agreed to expand the number of participating dioceses. Twelve of the eighteen additional dioceses invited applied to NDNV, and the dioceses of Spokane, Iowa, Southeastern Mexico, Kansas, Massachusetts, Southern Ohio, East Tennessee and Indianapolis were accepted, bringing the number of participating dioceses to fourteen by March of 2011.

In 2011, presentations at the May Council of Diocesan Executives Conference and a dinner for Diocesan Transition Ministers from the pilot dioceses helped spread the word about NDNV's purpose and possibilities. New ministry tools were made available on the NDNV website.

By August 2011, seven congregations and six clergy had completed NDNV intake materials.

In their third annual meeting in December of 2011, the Coordinating Committee created a timeline for the end of the pilot phase of NDNV. At this point, five of the fourteen dioceses were actively engaged with the project. Most were finding their own retired clergy. The Committee agreed to move the project to completion in 2012, requiring all Letters of Agreement by April 15 and completion of training by September 15. They began planning for a final report/evaluation of the pilot at the fourth annual Coordinating Committee meeting in December, 2012.

The seven NDNV congregations — Emmanuel, Massachusetts; St. Thomas, East Tennessee; St. Joseph's, East Tennessee; St. Alban's, Indianapolis; Grace Church, Kansas; Epiphany and Our Saviour, Southern Ohio — and six clergy in five dioceses that had completed the congregational and clergy assessment tools were ready for training by April 2012. Participating Diocesan Transition Ministers were likewise ready to move forward, and they joined with clergy and lay leaders in web conferences in May and July, followed by an in-person conference in August attended by five of the seven pilot congregations.

By October 2012, evaluation materials had been sent to all NDNV pilot dioceses, their bishops and Diocesan Transition Ministers, and to the pilot congregations, their lay leaders and clergy.

At its fourth and final meeting in December 2012, the NDNV Coordinating Committee reviewed the project evaluation materials, discussed what they had learned from the pilot, and created a plan for this report. The name, New Dreams/New Visions, was retired and the NDNV website and materials were transferred to the Episcopal Church Foundation in September 2013.

THE NDNV EXPERIENCE

A Vision Grounded in Baptismal Ministry

Let us dream of a church

with a radically renewed concept and practice of ministry

and a primitive understanding of the ordained offices.

Where there is no clerical status and no classes of Christians,

but all together know themselves to be part of the laos — the holy people of God.

A ministering community rather than a community gathered around a minister.

– Rt. Rev. Wesley Frensdorff, former Bishop of Nevada

A ministering community rather than a community gathered around a minister. This phrase, growing out of the Church’s understanding of baptismal ministry and trimmed to “gathered around the ministry and not the minister” was fundamental to NDNV’s vision for the pilot project. It was a basic assumption that congregations and clergy participating in the pilot would have made some progress toward seeing the life and work of their faith community as shared between laity and clergy.

Bishops and Diocesan Transition Ministers in participating dioceses were expected to identify two or three congregations that were ready to adopt the NDNV vision and work with the concept of the ministry of all the baptized. Diocesan Transition Ministers were to use resources already available to encourage and help congregations grow in their understanding of the responsibility each member bears for the church’s work and life.

At the end of the pilot, 64 percent of the bishops, diocesan staff and lay leaders responding to the evaluation described the NDNV Project’s fundamental vision — congregations gathered around ministry and not the minister — as a guiding principle in their work with small congregations.

NDNV Dioceses

*The sooner the clergy/bishop/appointed leader gets on board
(and invested) the sooner things get going.* –NDNV Participant

Diocesan involvement was key to the NDNV model.

To join the pilot, dioceses were required to:

- Work in a collaborative way with the Coordinating Committee and the project.
- Include one to three vibrant and stable congregations in transition interested in hiring part-time (half-time or less) clergy and moving from gathering around a minister to gathering around ministry. The congregations would also need to be able to provide an adequate compensation package (Church Publishing Group formula), incentives for clergy candidates, and to follow Church Publishing Group guidelines for retired clergy. In addition, the churches' lay leadership should be open to the NDNV pilot and able to call new clergy for a position of at least two years in the late spring/early summer of 2010.
- Work with the pilot to advertise, assess and place clergy who will support the project and help the congregation's mission and ministry.
- Participate in training for clergy and congregational leaders during their first two years in the pilot.
- Be a participant in Fresh Start.
- Include a bishop and Diocesan Transition Minister who enthusiastically support the pilot.
- Provide some funding for congregational leader and clergy development (Commission on Ministry matching grants for clergy continuing education, grants for vestry leadership development, etc.).
- Contribute at least \$1,000 to help fund the pilot.

Participating dioceses were also presumed to have done some intentional interim ministry work with potential pilot congregations, easing the separation from the previous priest, addressing lingering dynamics from that relationship, and paving

the way for the work they would do with NDNV to transition to part-time clergy. If interim work had not been done, congregations were asked to include some interim tasks in their new priest's first six to twelve months.

NDNV discovered a wide variety in diocesan approaches and frameworks for part-time ordained ministry. Some looked very much like full-time parish ministry with slightly reduced hours and diminished compensation. Others tried to provide models that delved more deeply into the ways that shifting to half-time clergy affects all areas of parish life. These second models generally called for extensive lay leadership development. More conversation about these models will be necessary across dioceses and provinces as new models emerge.

A key element in the NDNV process was the importance of diocesan staff in providing help and delivering the Ministry Tools to participating clergy and congregations. All congregational lay leaders mentioned the importance of the diocese working with them in the lead-up to calling the NDNV priest and in building an initial foundation for being "gathered around the ministry."

While the desire to participate in the pilot study was expressed by a number of dioceses, of the fourteen who signed on to participate in the study, half described their engagement with the program as "slight to none" at its conclusion. We wonder if this lack of engagement was a reflection of an unanticipated prerequisite — a diocesan culture ready to engage and reinforce significant changes in vocational and community models involving part-time clergy. Some dioceses noted that their lack of ability to engage was due to an outflow, rather than an inflow, of retiring clergy.

NDNV Clergy

Retired clergy are largely reluctant to move or commute a long distance.

– Leader from a rural diocese

NDNV had hoped to increase retired clergy interest in part-time ministry and provide a cohesive system to connect congregations with retired clergy. Advertising, feedback, and evaluative work in the pilot suggested that clergy interested in part-time ministry in retirement were most interested in:

- planning for a future retirement
- establishing local connections
- engaging part-time ministry with intentional wellness, including increased time for family and personal life.

Over the course of the pilot, we found that we had overestimated the flexibility of clergy interested in the project and their willingness to move. While one of the six NDNV clergy participants accepted a call to part-time ministry that required a move, regional or family commitments played a strong role in determining where the rest would be willing to serve. Still, around 20 percent of the clergy who inquired about NDNV indicated that they might be willing to move.

Intentional development of this area by diocesan leadership is vital if we are to provide retired clergy with opportunities for part-time ministry. Geographic challenges are a reality in some dioceses. A diocese that worked with retired priests already in the diocese told us, “It would have been difficult to get someone to relocate here for this program.”

NDNV Ministry Tools for clergy were described as moderately-to-extremely useful by the majority of individuals responding to a quantitative survey at the pilot’s end. Face-to-face opportunities for support and sharing were ranked very high by participants, whether in on-site training or e-conferencing. Clergy participants also sought new resources for the future, including resources for part-time clergy peer group formation, sharing vocational stories, the role of deacons, support groups, leadership development, functional cluster ministry model templates, theological leadership, entrepreneurship, community organizing, managing vocational expectations, and lay leader training.

NDNV Congregations

The NDNV approach helped us feel valued as a small congregation.

– NDNV Training Conference participant

Small congregations are often vibrant, faithful communities serving their area and proclaiming the love of God in Christ. During the pilot, we saw that vibrant congregations found tremendous encouragement and support when told that having less-than-full-time clergy leadership was becoming a norm for small congregations. They responded with energy and hope when diocesan staff presented the NDNV model for ministry. The NDNV Project helped them see the transition to part-time clergy as an opportunity to explore a new way of doing ministry and less threatening.

In NDNV's early days, we overestimated the willingness of congregations to accept less-than-full-time, retired clergy, however. DTMs reported meeting with congregations they thought would jump at the NDNV approach, only to find resistance to anything less than full-time clergy.

Parish leadership did not always understand the importance of sound lay leadership development as they began their transition to part-time clergy. We learned that it takes time, energy, and gentle support to help congregations navigate this shift. NDNV provided a systematic model for doing just that.

DEVELOPING HEALTHY MODELS

The call of a less-than-full-time priest is not the end of the process — it is the beginning of a new and exciting period of discovery for a congregation of any size. – Rector of a small congregation

Helping clergy and lay leadership work together on the NDNV approach was an important element. Project leaders did not “train the clergy” and then have him/her train the lay leaders. The approach was to have all leaders discover together the ways the NDNV approach could work with their community. Clergy and lay leadership were not told what their model for ministry should look like. They were invited to engage in their own, more organic process: Who should do what? Who has gifts for what? What should the cleric do and what should others do, especially since the cleric is part-time? The Ministry Tools invited them into a discernment process on such issues.

We found that it took longer than anticipated for clergy to move to this new way of thinking. Those who asked about the NDNV approach to ministry (gathered around the ministry and not the minister; not having the cleric “do” all the ministry, but share and empower lay leadership; etc.) had to shift from years of education and experience, from being in charge to being in partnership. While the clergy in the seven pilot congregations were already prepared for this to some degree, working through the Ministry Tools together helped everyone.

NDNV Assessment Tools

As part of the intake process, congregations completed NDNV’s on-line Congregational Assessment Survey (CAS). Data from the survey provided a way to compare the vestry’s thinking on the church’s mission and ministry to the congregation’s and served as a platform for important conversations with the

Diocesan Transition Ministers and incoming clergy. NDNV participants reported that they found the Congregational Assessment Survey “very helpful.”

NDNV clergy were asked to use existing assessment tools that included the Office of Transition Ministry Clergy Portfolio and the Gallup organization’s StrengthsFinder and WellBeing tools, along with their CREDO Vocational Profile. NDNV leaders found that Gallup’s StrengthsFinder was the best tool, providing data that could be shared with NDNV, the Diocesan Transition Ministers and the congregations.

NDNV Ministry Tools

NDNV Ministry Tools were collected from a variety of sources to provide clergy and congregations with the knowledge and skills they would need to adopt the NDNV model. They were structured around three steps:

- Training for understanding the NDNV Model

Training for Understanding: What This New Model Is About, was made up of eleven PowerPoint lectures/discussions organized around four areas: “Models of Ministry,” “Managing Change,” “Working Together,” and “Communities of Welcome.” Materials in this first module provided background on a wide range of topics — baptismal ministry and the impact of church size, transitioning to part-time clergy, new ways to view and structure leadership, decision-making and discerning mission, radical hospitality.

- Training for actualizing the NDNV Model

The second module, *Training for Actualizing: Making This Model a Reality in Our Community*, was geared toward putting the learning from the first series to work. The emphasis was on team building in prayer, financial stewardship, times of conflict, and developing ways to review and improve the church’s mission through mutual ministry review.

- Training for gifts discernment and team ministry

Lecture/discussions in this final module were meant to help NDNV congregations develop sound practices for discerning particular gifts for ministry among their members and for building teams that would work together with the clergy to carry out the church's mission.

Reluctant to present the NDNV Ministry Tools as a "program," NDNV leaders encouraged congregations and leaders in the pilot to use what they needed, when they needed it. The plan for Ministry Tools was extensive, and not all tools were in place at the project's conclusion.

The NDNV Pilot tested the Ministry Tools they had assembled and found them to be helpful to diocesan staff, clergy and congregational leaders. Both Diocesan Transition Ministers and NDNV congregational leaders said that using the Ministry Tools gave them a platform for conversations that helped change their approach to ministry. Among the NDNV tools rated "very helpful" at the project's end were segments on transitioning from full-time to part-time ordained ministry and on using the vestry as a discernment body, as well as the intake worksheet and assessment survey completed early in the project.

Using the Ministry Tools needed some facilitating, however. Putting them on the website and inviting congregations to use them as needed did not work as well as NDNV leaders hoped. The tools needed to be introduced. NDNV participants needed to learn ways to customize them, to fit them to who they were and where they were in their journeys. The Diocesan Transition Ministers admitted that "they dropped the ball" in doing this work.

NDNV Materials, Webinars and Training Conference

We are not alone in this situation. We're encouraged to learn from one another about what is working and what is not.

– NDNV evaluation

NDNV was most successful in creating training and mentoring opportunities for lay leaders and new clergy. Project leaders found that networking is highly important for clergy and congregations taking a new approach to ministry. Participants repeatedly stressed the value of connecting with other congregations and clergy working with new models for ministry as they transitioned to part-time clergy. Lay leaders who attended the August 2012 Training Conference expressed their gratitude for the chance to interact and connect with others in similar situations.

Our congregational leaders were so inspired by both the webinars and being together at the [NDNV Training Conference] and their interactions with the other lay leaders. – Diocesan leader

Webinars in 2012, one in May and one in July, brought all NDNV clergy, lay leaders, and Diocesan Transition Ministers together online. The first webinar centered on the shift from “being gathered around the minister” to “being gathered around the ministry.” The second looked at the NDNV Ministry Tools and how they might be used. Participants appreciated the teaching provided by the webinars and were pleased with the conferencing software, AdobeConnect. Their evaluations praised the second webinar, in particular, for providing a clear understanding of the Ministry Tools and how they might be applied. While feedback was generally positive, some felt the web conferences would have been more productive if they had done some community building and used the Ministry Tools before gathering online.

The webinars were followed by the NDNV Training Conference at the Diocese of Ohio’s Procter Center attended by five of the seven pilot congregations August 16-18, 2012. Led by NDNV Project Coordinator Thad Bennett and ECF President Donald Romanik, the goal of the conference was to equip the pilot congregations to continue working with the NDNV plan in cooperation with their diocesan staff after the pilot ended. Sessions involving all participants considered the way the NDNV approach was communicated in their congregations, practical issues like budgets, and discerning what they could accomplish and what God is calling them to do. Each set

of NDNV leaders spent time discussing concrete ways to establish their congregations more firmly in the NDNV model over the next three years.

In the evaluation at the end of the conference, participants noted that its timing was perfect, with the pilot about to enter its final, evaluation phase. They commented on the need for additional Ministry Tools covering topics like “leading from our strengths, discerning gifts, mission-based budgeting, and structuring leadership teams.” They wanted help in continuing to network with one another and suggested that current NDNV congregations might serve as mentors for other interested congregations and dioceses. And they expressed their desire to regroup for a follow-up conference after the NDNV pilot’s end.

IMPACT OF THE NDNV PILOT PROJECT

While NDNV formally ended on December 31, 2012, the NDNV experience and the resources it developed and tested have taught us a great deal about how to provide care and support to congregations and clergy transitioning from full-time to a part-time priest working with congregational lay leaders.

NDNV demonstrated significant need in the Episcopal Church for healthy models for part-time ministry. All the pilot diocesan leaders reported placing clergy, some of whom were retired, in part-time positions during the project. Seventy-three percent of those leaders indicated that clergy leadership in their smaller parishes was moving significantly toward part-time.

NDNV found that clergy and congregations can move from the old model — gathered around the minister — to a new one, of gathering around the ministry, but they need help and support to make this important transition. NDNV Ministry Tools helped small congregations engage new models of leadership and ministry in a healthy way, but the project also demonstrated the need for diocesan staff assistance in using the tools effectively. Given that staffs are shrinking in many dioceses, the marketing and delivery of the Ministry Tools and other resources will be a challenge for the NDNV approach moving forward.

NDNV also showed that it takes time to get clergy and dioceses on board with this approach. Diocesan cultures that expect one-priest-one-congregation as the norm for successful ministry need help moving to new models of shared leadership, where lay people do many things formerly left to full-time clergy and where some things just might not get done.

The NDNV process and tools are about any part-time clergy, not just those who are retired, and the pilot project findings apply to any congregation with less-than-full-time clergy leadership. While the NDNV pilot project focused on part-time, retired clergy, the NDNV approach and Ministry Tools can be helpful to all congregations

working with less-than-full-time clergy, especially those transitioning from a full-time clergy leader.

NDNV gave people a platform and permission to begin to talk and think in a different way. In changing times, the institutional church needs to provide resources like those developed for NDNV to stimulate conversation and encourage exploration of the ways we approach ministry.

NDNV TRANSITIONS TO ECF

The New Dreams/New Visions name was formally retired at the project's end, though pilot congregations and dioceses can continue to use the name and logo. Convinced that the pilot will have a continuing influence on the Episcopal Church over the next decade and perhaps longer, NDNV resources and materials were transferred to ECF's Leadership Development department in 2013. There they can be further developed and shared more widely throughout the church. The Office of Transition Ministry at the Episcopal Church Center continues to promote NDNV models and resources in their work with Diocesan Transition Ministers, and we hope that the experiences of the pilot congregations going forward will bring encouragement for the NDNV model.

Material for this report, submitted by NDNV Project Coordinator Thad Bennett, was gathered from participants' comments and input at the 2012 NDNV Training Conference, a web-based survey of all NDNV participants (including bishops and Diocesan Transition Ministers), and from the insights and reflections of the NDNV Coordinating Committee.

APPENDIX

NDNV Funding and Expenses

FUNDS RECEIVED PRIOR TO THE INITIAL JUNE 2009 CONFERENCE:

Transition Ministry Conference:	\$2,500
Diocese of Vermont	\$2,500
Diocese of Western Massachusetts	\$2,500
Diocese of Eastern Michigan	\$2,500
Diocese of Maine	\$1,000
Diocese of Delaware	\$1,000

FUNDS RECEIVED AFTER THE INITIAL CONFERENCE

Transition Ministry Conference:	\$5,000
Office of Transition Ministry	\$5,000
Diocese of Long Island	\$1,000
Roanridge Grant	\$21,000
Pilot dioceses	\$4,000

EXPENSES*

NDNV Coordinator, Ministry Tools, Administration, etc.	\$24,000
NDNV Training Conference	\$10,000
NDNV Coordinating Committee Meetings, etc.	\$ 7,000
NDNV Marketing, Website and AdobeConnect	\$ 4,000
NDNV CODE presence and gathering	\$ 3,000

* Approximate numbers. For a full accounting contact the Episcopal Church Foundation.

NDNV Ministry Tools:

[Introduction for Diocesan Transition Ministers and NDNV Clergy \[Exit Strategy\]](#)

[Introduction for Pilot Dioceses and Their Congregations](#)

[Change and Transition: Doing a New Thing](#)

[Church Size: Experience and Expectations](#)

[Moving from Full-time to Part-time Clergy Leadership](#)

[Gathering Around the Ministry](#)

[Decision Making for Church Leaders](#)

[Team Plus One: Ministry for All and All for Ministry](#)

[Practicing Spiritual Discernment: Your Vestry as a Discernment Body for Ministry](#)

[Parallel Development: Intentional Succession Planning](#)