Coaching Up: Concept and Implementation Between First- and Second-Level Leaders

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Abstract
Coaching becomes a critical activity that must be tailored for each unique circumstance, relationship, authority level, and end-in-mind desired result. Many times the coaching is between an executive and a team member lower on the hierarchy; sometimes there is a supervisory function while relationally more like peers; and the most unique relationship, upon which this method primarily focuses, is between the senior leader and the second-level leader, which involves the concept of “coaching up.” This requires an evolved relationship built on trust, relentless loyalty, and the absence of personal agenda. Coaching up is defined as the ability to influence the viewpoints and actions of a higher-ranking leader by the second-level leader.

Keywords: coaching, executive, organizational

The daily experience for an executive pastor (XP) at a growing evangelical church includes functional administration, problem-solving, the development of systems and protocols, and the implementation of the senior leader’s vision. Another major aspect is the supervision and coaching of a team of pastors and support staff encompassing a wide diversity of talent, skill, experience, and personalities that must be managed with finesse and compassion—all while ensuring they individually and collectively remain aligned to the mission, vision, and values of the organization. While this is a common description of an organizational manager’s executive role, it takes on additional challenges because of the nature of the business. As a church, team members are more than employees, as they are also church family members and part of the local Body of Christ. Underperformance, misalignment, and functional disagreements must be addressed differently than standard periodic and annual reviews dictate, as interdependencies between team members also have a biblical mandate, outlined in detail in Matthew 18: 15–17, as to how conflict is to be addressed and resolved.
15If your brother sins against you, go and tell him his fault, between you and him alone. If he listens to you, you have gained your brother. 16But if he does not listen, take one or two others along with you, that every charge may be established by the evidence of two or three witnesses. 17If he refuses to listen to them, tell it to the church. And if he refuses to listen even to the church, let him be to you as a Gentile and a tax collector. (English Standard Version [ESV], 2001, Matt. 18:15–17)

This advice from the apostle Paul is an extreme measure to take to resolve conflict between team members, so hopefully the practical application will come to a positive outcome long before the entire process must be carried out.

In the context of a church and the XP, supervision becomes far more than mere oversight, moving to an often-daily coaching activity, integrated with the heart of a spiritual mentor and pastoral guide. With this in mind, the supervisor must “take account of the legitimate personal needs of their dedicated employees” (Badaracco, 1997, p. 18) while still holding people to agreed-upon standards and utilizing appropriate disciplinary methods when necessary. The biggest challenge, as mentioned above, is that the team is a family, and when a family member is unhappy, everyone may know about it, plus when a family member is disciplined, others may disagree, even publicly, with the decisions of the leaders. The leader’s role is a tightrope on which they must skillfully and delicately balance.

Coaching becomes a critical activity that must be tailored for each unique circumstance, relationship, authority level, and end-in-mind desired result. Many times, the coaching is between the XP and a team member lower on the hierarchy; sometimes there is a supervisory function while relationally more like peers (pastor to pastor); and the most unique relationship, upon which this paper will primarily focus, is between the senior leader and the XP. Their interaction involves the concept of “coaching up,” which requires an evolved relationship built on trust, relentless loyalty, and the absence of personal agenda, all manifested in the scriptural application of equipping “the saints for the work of ministry” (ESV, 2001, Eph. 4:12). It requires a great amount of effort by both parties, because, as Blanchard and Shula (2001) stated, “All great results are built on the foundation of practice and preparation” (p. 33).

The following discussion will demonstrate how these concepts are applied and provide examples of when they have been successful and when they have not, particularly in the relationship between the first- and second-level leaders (senior pastor and executive pastor). Additionally, in support of the coaching-up approach discussed, there will be a sampling of the academic and popular press materials already in publication that examine the coaching relationship in organizations and speak specifically to the role of an executive in the second-level leadership seat. Once the concept is defined and the
key methods of implementation are presented, I will speak from personal experience to examine the reality of the practical application with advice as to what has been effective, the challenges faced, and the questions I continue to ask myself in the learning process.

Please note that while this paper is written in the context of a faith-based organization with senior and executive pastors, the principles and applications apply to any organization in which there is a senior and second-level leader in the mix. I intend to further develop this method for the general organizational marketplace following this introductory discussion.

**Definitions**

*Coaching up* is defined as the ability of the second-level leader to influence the viewpoints and actions of a higher-ranking leader. It is on this definition that we will base our discussion, using it as the standard to be met by the second-level leader.

Another foundational definition is that, simply stated, leadership is widely accepted as influence. Grenny et al. (2013) observe, “At the end of the day, what qualifies people to be called ‘leaders’ is their capacity to influence others to change their behavior in order to achieve important results” (p. 6). Many popular leadership experts agree that organizational success is dependent on the leader and often credit President Ronald Reagan as stating, “In the end, it all comes down to leadership” (Eades, 2016, para. 1).

However, particularly in 21st-century organizations, it is well known that many wildly effective leaders in the modern era attribute much of their success to the talented team members they have assembled around them. By doing so, they are able to tap into their collective competencies and “generate magic – producing something extraordinary, a collective creation of previously unimagined quality or beauty” (Hackman, 2002, p. viii). This particularly happens in the assembly of a small circle of advisors, confidants, and loyal members of the executive team who have learned to finesse their way through the difficult dance of leadership when they are not ultimately in charge. This requires one to “dance in the moment” (Kimsey-House et al., 2011, p. 6), to be fully present, aware, and responsive. These are the ones who are in a position to coach up.

**Three Must-Haves for Coaching Up**

A non-exhaustive Google search will produce a myriad of popular publications relating to the second-level leader and how they can learn to influence their senior leader. For everything from how to get your boss to do what you want; leading from the middle; to leading up, down, and sideways, there are a multitude of techniques outlined by a countless number of writers. Each have their own formula for effectiveness, some anecdotally proven, some untested, but all with recommendations as to what tools the second-level leader should have in their toolbox. Kimsey-House et al. (2011) outline the
qualities that must be present as confidentiality, trust, speaking the truth, openness, and spaciousness. Badaracco (1997) emphasizes the ability to ask questions and Heifetz et al. (2009), the willingness to orchestrate conflict. Schein and Schein (2021) advocate humble inquiry and Eisner (2010) insists the key is managing “Mishegoss, a Yiddish word that essentially means craziness” (p. 23).

I propose the following three must-haves if the second-level leader is to be successful in influencing their senior leader: trust, relentless loyalty, and the absence of personal agenda.

**Trust**

Cloud (2023) is one of the scholar-practitioners who includes trust as a key to influence. In his work, he identifies the big five essentials for building trust as understanding, motive, ability, character, and track record. For this portion of the discussion, we will use Cloud’s big five as a guide.

*Understanding* has to do with the ability of both senior and second-level leaders to truly listen to the other person to the point that they fully understand the other. This comes through extensive and transparent communication, relying on questions sincerely asked and answers honestly given. This results in what Marquardt (2014) refers to as leaders’ “ability to search for the unfamiliar” (p. 55) as they develop a common context and become fully aware together, turning awareness into action (Palmer & Whybrow, 2008). This also is the basis of humble inquiry, which is based on curiosity, openness to truth, and the recognition that insights most often come from conversations and relationships in which we have learned to listen to each other, and have learned to respond appropriately to make joint sense out of our shared context, rather than arguing each other into submission. (Schein & Schein, 2021, p. 4)

To get to a position of understanding, participants must be willing to endure tension and disagreement, however, Block (2011) states that “resistance is a sign that something important is going on” (p. 289), and so by enduring, greater understanding of each other emerges because “nothing or no one is truly separate from their context” (Houston, 2003, p. 143). Second-level leaders must keep in mind that if they understand the context, they will understand the other person.

*Motive* is the second key Cloud (2023) includes to build trust, and it refers to the fact that the one giving the input to the other is sincerely looking out for the best interest of the one receiving the input. In this case, does the second-level leader have their senior leader’s back? To put it in more graphic terms, but metaphorically, of course, will they take a bullet for their leader? Motive begins with the desire to develop a trusting relationship of empathy and understanding (Schein & Schein, 2021), is developed through authenticity (Blanchard & Shula, 2001), and solidified as the participants begin
to truly care for one another (Stoltzfus, 2005), not only professionally, but personally. The key to this development is time invested in each other.

*Ability* (Cloud, 2023) is defined by assuming the person earning the trust actually has the capability and competence to get a job done and is credible in the advice they offer. Stroh and Johnson (2006) spoke to this when they stated, “If you do not pass the competency test, your first meeting is likely to end rather quickly” (p. 18). This applies to an external consultant being brought in to address problems, but it is even more important internally between leaders. This is also where Eisner’s (2010) “mishegoss” comes into play (p. 23).

The next key word chosen by Cloud (2023) is *character*, however, not as one might take it on the surface. Yes, someone’s integrity must come into the mix, however, in this case, character is used to describe how the person is wired by God. Will their personality and makeup match the nature of what the circumstances or situation require? Do they have the intestinal fortitude to weather a difficult season? Can they stand their ground when the going gets tough? The makeup of the person plays a key role in how much a senior leader trusts their “number one” (Faraci, 2020). Do they have the right character for a role that must be trusted?

Finally, trust is built through the *track record* (Cloud, 2023) of the second-level leader. Unless the two leaders have worked with each other in previous organizations, on day one it will be difficult for the senior to trust the second because there is no track record. Again, this requires time to develop, however, with each day passed, tasks accomplished, difficulty endured, and success recorded, trust is advanced because there is a track record being written in the books. Marquet (2020) states, “We judge ourselves by our intentions, but we judge others by their behavior” (p. 107), and it does not take long for a leader to start to question a team member’s ability to get a job done if they speak a big game but deliver only a small amount of what they have said they would do. In my personal experience, a couple of phrases often spoken by my senior leader are “Be careful not to over-promise and under-deliver” and “Past behavior determines future expectations.” They both have to do with the need for a track record of doing what one says they will do, delivering results, and depositing positive experiences in the track record bank. In the influential book *Leading from the Second Chair*, Bonem and Patterson (2005) state, “Trust is more than a characteristic; it is the foundation for an effective partnership between first and second chair” (p. 36).

There are two other must-haves for the second-level leader that are almost as equally important to coaching up, but significant time has been spent so far on the first, trust, because without it, the senior and second-level leaders will not get to a point where they need the other two. Without trust, all else is pointless.
Relentless Loyalty

“Are you with me or against me?” is a phrase often used by leaders when attempting to rally the troops for a cause, a campaign, a war, or even a board meeting, and has been used by many historical figures throughout the human experience. It is said that fascist Benito Mussolini would close many of his speeches with “O con noi o contro di noi” (Translation: Either you are for me or against me) to excite and incite his followers. Coaches will holler, “Are you with me?” to their football team as they head out after a rousing half-time speech. Even Darth Vader stated in the film Star Wars, Episode III, “If you’re not with me, then you’re my enemy.” (Scholarly Community Encyclopedia, n.d.). These are good examples of this call to action, however, the best, and why relentless trust is included in the must-haves for second-level leaders, comes directly from Jesus Christ himself. In Matthew, chapter 12, he states,

30 Whoever is not with me is against me, and whoever does not gather with me scatters. 31 Therefore I tell you, every sin and blasphemy will be forgiven people, but the blasphemy against the Spirit will not be forgiven. 32 And whoever speaks a word against the Son of Man will be forgiven, but whoever speaks against the Holy Spirit will not be forgiven, either in this age or in the age to come. (ESV, 2001, Matt. 12:30–32)

Jesus goes on to discuss how a “tree is known by its fruit” (ESV, 2001, Matt. 12:33) and that if a tree does not produce good fruit, it will be judged and cast out. From this, we understand that Jesus took loyalty very seriously; his followers were either with him or against him. It is the same with the relationship between the senior and the second-level leader. For there to be the ability to coach up, there must be no doubt of the relentless loyalty of the second-level leader, or in my case, the XP. At no time can the senior leader wonder if their number one will be loyal in any and all public contexts. There can be questions, discussions, and disagreements behind a closed office door, but once a decision is made and the office door opens, there can be nothing but uncompromising, relentless loyalty shown.

For me, a decision point came in which loyalty had to be chosen or discarded at a senior staff retreat about a year into the pastor and XP’s relationship. The senior staff had become accustomed to making their own decisions, following their own agendas, and justifying why they were not fully aligned with the vision of the senior leader. While the group fundamentally agreed with the mission of the organization, they greatly differed in the methods and the desired outcomes to the point they were pushing back on the senior leader’s vision for the upcoming year.

Everyone was given an opportunity to speak up, which came mostly from those who wanted to be left alone to do things their way and take the church in their chosen direction. When it came time for me to weigh in, a pivotal decision point was at hand.
To whom would loyalty be given? After a long, awkward silence, the decision was made, and the following was said (paraphrased), “We all agree on the mission, but I believe the way we get there is not ours to decide individually. We must follow the direction and the vision of this man (pointing to the senior leader). If we cannot get behind his plans, the vision he believes God has given, and the authority he holds as leader of our church, perhaps you should not be on his team.”

The awkward silence of before was greatly outvoiced by the silence after, and this became a significant turning point in not only the relationship between the senior leader and me, but between myself and all the other senior staff at the table that day. It put in motion a series of events that still exists years later, resulting in many who sat at the table that day making their exit and the team being rebuilt with like-minded individuals willing to follow the direction of their senior leader.

In order to make relentless loyalty a part of the coaching-up model, the second-level leader must employ several behaviors.

1. “Machiavelli believed, above all else, that successful leaders must see the world as it really is” (Badaracco, 1997, p. 79). Applied to relentless loyalty, it is the reality that the one in charge is ultimately the senior leader of the organization. The second-level leader carries great responsibility, but limited authority. They have the ear of the senior leader, but at the end of the day, they are not in charge.

2. The second-level leader must be brutally honest within the appropriate setting. Rath (2008) states, “At the company-wide level, nothing creates stability as quickly as transparency” (p. 88). The second-level leader must have the courage and permission to speak what is on their mind.

3. Scott (2019) advocates the second-level leader being willing to challenge the senior leader directly through radical candor, “which shows you care enough to point out both the things that aren’t going well and those that are and that you are willing to admit when you’re wrong and that you are committed to fixing mistakes that you or others have made” (p. 14). He also states that radical candor shows you give a damn about the organization and the individual.

I must admit that choosing relentless loyalty has not always been pleasant. There are times when other staff members have been put off and felt that “parroting the leader’s voice” was all that was being done and wished they could continue to be left alone to do things their way. There have even been times when the senior leader has said, “Sometimes you are too loyal,” however, it is believed that without this known level of loyalty, the senior leader would be less open to the coaching that comes from their second-level leader. If given the choice at the decision point described above again, the same decision would be made. The answer to the question, “Are you with me?” has already been decided upon.
The Absence of Personal Agenda

Just as there was a decision point when it was necessary to choose relentless loyalty to the senior leader, a previous decision was made even before arriving to work on the first day. My previous experience had been a successful run within a totally different discipline of organizational ministry. There was the feeling I had already had my “career” and I was not trying to prove myself in the same manner as before. I had accolades and achievements, so succeeding in a new position was less of a personal proving ground and more of a desire to make an impact organizationally and for the mission. Because of this, the decision was made that personal agenda was to be put aside in favor of the larger purpose. Instead of seeking the spotlight, a behind-the-scenes approach was to be embraced, and rather than personal recognition, investing in others in order to help them thrive would be the priority in time, effort, and encouragement.

For someone who had spent a lifetime out front getting noticed, it has been a totally new and different experience, and one that has taken a concerted effort to put into practice, turning the dialogue away from self (Schein & Schein, 2021) and understanding that “building credibility and influence [with the senior leader] requires putting the prestige of your position aside and picking up the towel of service” (Bonem & Patterson, 2005, p. 13). There are many times within the coaching conversations when an opinion is asked for, however, it is important to remember that the agenda of the senior leader and the welfare of the organization takes precedence over any personal preferences or plans. It can be amazing how freeing it is to have no personal agenda, because it allows the second-level leader to take a mindfulness approach (Langer, 1997) and “take the time to wonder what else is happening here? and what is different today?” (Schein & Schein, 2021, p. 114). It is hard to be open to all possibilities when a personal agenda is in the way, but when that is removed, the potential is limitless.

In order to put personal agenda aside, the best example, once again, is to look at how Jesus did this very thing as he followed his Father’s plan to bridge the gap between a holy God and sinful humanity. We do not know with certainty if Jesus himself had a personal agenda he would have preferred, however, we do know he put aside his will in favor of the will of his Father. He said, “Not my will, but yours be done” (ESV, 2001, Luke 22:42). In my book The Humility Factor (Plastow, 2017), the following passage from the chapter “The Humble Servant” describes Jesus.

Jesus is often referred to as the greatest example of servant leadership to have ever lived (Hutchison, 2009). In His own countercultural manner (Robbins, 1996), He went about His ministry serving the people He encountered in whatever way was needed at the moment. Healing, encouragement, forgiveness, provision, and care were all ways in which Jesus served people even while possessing the power to do whatever He might choose to do at any given time (Ferch, 2015).
However, instead of overturning governments and flexing His creator-of-the-universe muscles, He washed feet, wept with beloved friends, and provided wine at a wedding party. (p. 11)

Putting personal agenda aside is an act of humility and follows the example Jesus gave us. It means that the second-level leader does what is needed for the vision of the senior leader to be advanced. They are free from the bondage of their own agenda.

Trust, relentless loyalty, and the absence of a personal agenda are the three must-haves for the second leader to skillfully employ if they desire to be effective in coaching up their senior leader. Without them, speaking into the processes and behaviors of the senior leader can fall on deaf ears, and influence is lost.

**Practical Application: How Does This Work?**

Kimsey-House et al. (2011) stated, “Coaching is a way of effectively empowering people to find their own answers, encouraging and supporting them on the path as they continue to make important life-giving and life-changing choices” (p. xvi), and “the real art of effective coaching comes from the coach’s ability to work within the context of relationship” (p. 15). Once trust is established, loyalty assured, and the second-level leader has been freed from the bondage of personal agenda, the two leaders are able to enter into the truly transformative relationship of coaching up. So, how does it work? The following are examples of how coaching up manifests between a senior and second-level leader in real-life situations.

**New Initiatives**

In any growing organization, there should be continued innovation and discussion among staff as to how to do things better. Depending on the size of the staff, this can become overwhelming in scope because there are many talented and committed people who would like to try out their new ideas. At some point, there needs to be a sounding board for proposals in order to bring the best and most reasonable ideas to the top of the list. The coaching-up arena is a good way to do this level of evaluation, as the senior leader will be able to give their 30,000-foot impressions of the ideas and the second-level leader can provide a view that takes into consideration logistics, budget, timing, context, and perspective because of the supervisory relationship they may have with the proposing staff member. Between the two leaders, a decision can be made as to which ideas warrant further discussion with the senior staff, or if something is compelling enough to get started on it right away.
Hiring

Even while there are some who believe teams are families (especially in churches) and no one should ever want to leave for another opportunity (or get mad and just exit), the reality of the situation is that there will always be turnover even in the best of working teams. Human resources (HR) matters, and hiring will always be on the executive leadership’s to-do list in some fashion. While each set of leaders will have different processes they go through to find, interview, and hire new staff members, the ability of the second-level leader to speak into that process with the senior leader is an important component of coaching up. The first glance at résumés and applications can be taken solely by the HR manager or the second-level leader, but interviews should be conducted by the senior leader and XP together, and, as things go deeper into the process of hiring, the communication between the two leaders should intensify. Ultimately the senior leader will be responsible for the final decision, but the input from their second chair is vital to making the best choices. “What do you think?” is a real question that should be answered fully.

A Place to Vent

Former CEO of Disney, Michael Eisner (2010), stated the obvious, “It’s inevitable in any work environment … there are always going to be people working for you upset about something” (p. 21). One of the greatest services a second-level leader can provide to their senior leader is a place to vent. This writer often has the senior leader spontaneously show up in their office, close the door, sit down in the guest chair, and say, “Talk me off the ledge on this.” When dealing with a multi-person staff and serving a large group of people, there is bound to be someone unhappy about a decision made, a service discontinued, or simply an innocent misunderstanding between people virtually all of the time. Because of the relationship between the two leaders, it is a natural outlet for the senior leader to come to the second level to get things off their chest, with or without the expectation of resolving anything. In many cases, all they really need is a listening ear.

Unsolicited Advice (Careful!)

There are times when the second-level leader becomes aware of a situation brewing—or observes the behavior of the senior leader—and believes they should bring up their concerns. This should be done gently, factually, humbly, and with options as to solutions if asked for. Care should be taken depending on the personality of the senior leader, stresses evident, past history, and, of course, timing. Sometimes it is just not a good time to wade into what could be a difficult conversation.
Crises

In my experience, there are two primary examples as to how important coaching up can be to the senior leader and for the general good of the organization. Both of these can be identified as crisis moments, the first being one to which we can all relate: the COVID pandemic. It brought about the need for leaders in all organizations to come up with a plan of response for a wide variety of situations: how to keep the staff healthy; how to keep the public safe; do we shut down or stay open; mask or no-mask policy; what happens when someone tests positive, and so on. It seemed that no one quite knew the best way to deal with the ever-changing rules put out by local and national governments and the constantly-evolving state of public opinion.

We found that it did not matter what decision we made—someone was going to get angry about our decision. It was a losing proposition. The coaching-up relationship was amplified each day as we worked together to find what our best path forward would be. Together we shouldered the decision-making and together we got our organization through the crisis.

The second crisis we weathered together involved some serious staff issues that just so happened to be concurrent with the pandemic. We had to deal with a variety of issues that required a great deal of communication and consideration of options on how to handle each escalation. We got through it, but had we not had a high level of trust already in place and had there not been relentless loyalty on my part, it could have turned out very poorly for the senior leader and the organization.

Does This Really Work?

You may ask, does this really work? Are there times that coaching up is ineffective or makes situations worse? The answer is simply that coaching up does not work if it is not tried. A cornerstone of this method is communication. If the leaders are not continually talking about the things that matter to their organization, perspectives will be missed and mistakes will be made. Ethicists Bazerman and Tenbrunsel (2011) warn that soft language and poor communication “makes the unacceptable permissible and allows unethical practices to abound” (p. 124). The writer of Proverbs is clear that we are best off when we seek the input of wise advisors. “Without counsel plans fail, but with many advisors they succeed” (ESV, 2001, Prov. 15:22). Coaching up works, but only when put into practice.
Why Coaching Up Matters

Coaching up is an important exercise that directly impacts the effectiveness of the organization and, in my experience, the local church, its staff, and its congregation. I am still learning how the methods can be used on a day-to-day basis and make a real difference in the relationship between myself and the senior leader. There are subtleties to be observed, timing perfected, and communication techniques to be honed, however, because of the examples provided above, there is reason to believe that coaching up is a skill worth learning more about.

Some of the most compelling reasons to adopt this method are the implications in Ephesians 4:11–16.

11 And he gave the apostles, the prophets, the evangelists, the shepherds and teachers, 12 to equip the saints for the work of ministry, for building up the body of Christ, 13 until we all attain to the unity of the faith and of the knowledge of the Son of God, to mature manhood, to the measure of the stature of the fullness of Christ, 14 so that we may no longer be children, tossed to and fro by the waves and carried about by every wind of doctrine, by human cunning, by craftiness in deceitful schemes. 15 Rather, speaking the truth in love, we are to grow up in every way into him who is the head, into Christ, 16 from whom the whole body, joined and held together by every joint with which it is equipped, when each part is working properly, makes the body grow so that it builds itself up in love. (ESV, 2001)

The implementation of coaching up has a direct impact on the body of Christ because the leaders have their act together. What they do equips the saints (that is all of us) for the building up of the body.

Conclusion

As with the partnership between the senior and second-level leader, “Getting things done requires discovering what people want together. The united wants—explicit or implicit—provide the shared motivation to really do something significant. Without it, people are just going through the motions” (Bellman, 2001, p. 15). You will know that you have achieved a posture of coaching up and are truly united when you receive an email with the subject line of “I need your input” or a spontaneous visit to your office when they close the door, sit down, and say, “Help me out with this.”

The second-level leader’s role is not easy to navigate. It requires humility and a little bit of chutzpah. As Bonem and Patterson (2005) state, “Being in the second chair is the ultimate leadership paradox. It is the paradox of being a leader and subordinate, having a deep role and a wide one, and being content with the present while continuing to
dream about the future” (p. xiii). The ultimate dream, then, is to make a positive impact on the mission, organization, and senior leader you serve by coaching up.

**Author Note**

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