

Checklist for Pastors in Transition

The following information should be included in the transition packet that the outgoing pastor gives to the incoming pastor. This list is not meant to be exhaustive, and not every church will have every item available, but this list will help you begin to gather the information that will help the new pastor during the transition.¹

CONGREGATIONAL DOCUMENTS

1. Copy of the church's vision/ mission statement
2. Most recent minutes of all-church conferences or meetings
3. Church directory, annotated with information about relationships, pastoral care needs, and potential leaders
4. Church email list
5. Organizational chart (committees, staff)
6. List of church lay leaders and committee members and contact information
7. Last Year's Charge Conference Report
8. Last Year's Annual End of Year Statistical Report
9. Congregational Profile completed by SPRC last August/January
10. Church history statement
11. Worship Life:
 - a. Recent bulletins for each worship service
 - b. Orders of service for online worship
 - c. Bulletins for most recent Christmas Eve and Easter services, as well as other special services that are routinely part of the church's life
 - d. Current Copyright licenses (music, streaming, etc.) and contact information for person who completes licensing reports
12. Pastoral Care:
 - a. List of those in nursing homes or homebound
 - b. List of those struggling with long-term illness, grief, etc.
13. Copies of any ministry or church brochures currently in use

POLICIES

1. Wedding Policy
2. Funeral Policy
3. Building Use Policy
4. Employee Handbook / Staff Personnel Policy (see staffing section below)
5. Financial Controls Policy/ Spending Restrictions

FINANCIAL DOCUMENTS

1. Progress on Arkansas Conference Tithe (and contact information on treasurer or person responsible for filing tithe reports and making payments)
2. Current and last two years of budget reports
3. Latest month's financial statement

¹ This list is adapted and expanded upon from the excellent resource found in the appendix of *Your Best Move: Effective Leadership Transition for the Local Church* by Robert Kaylor, Asbury Seedbed Publishing.

4. Last three church newsletters
5. Outstanding large debts
6. Recent capital campaign materials
7. Giving report (givers, pledges, and actual amounts given) for last year and the first two quarters of current year
8. Current grants that will need future reporting

STAFFING DOCUMENTS

1. Staff listing, Contact Information
2. Staff Organizational Chart (supervisory/reporting relationships)
3. Staff Salary Sheet
4. Employee Handbook / Staff Personnel Policy
5. Job Descriptions
6. Staff ministry area briefings: 1-2 page descriptions created by staff members
 - a. Short Informal Description & History of Position
 - b. Hours/Days Scheduled Weekly
 - c. Current Goals
 - d. What do you enjoy most about your ministry?
 - e. What open projects are you currently working on that will still be in progress when new pastor arrives?
7. Recent staff meeting agendas

SCHEDULE

1. Scheduled weddings in July or beyond
2. Scheduled Special Events
3. Scheduled Committee Meetings in July-August
4. Set dates for meetings that run every month/quarter
5. VBS (Day or Evening?)

OTHER ITEMS

1. Church keys
2. Passwords to church computers, church website, VitalSigns, Ezra, email, social media, Zoom, digital services and accounts
3. Disaster response plans/contacts for natural disasters (tornado/floods)
4. Technology resources and contacts for any online serves, including digital filming team

PARSONAGE

1. Keys
2. Manuals for all appliances
3. Names and phone numbers of plumbers, electricians, etc. that the church has approved
4. Contact information for the parsonage committee chair (or trustee contact)
5. Policies or Expectations relating to the parsonage (improvements, repairs, etc.)
6. Trash service days
7. Lawn care expectations
8. Maintenance Schedule: HVAC contract, Pest Control, etc.
9. Significant parsonage information: recurrent flooding, basement or HVAC issues, etc.

10. Property Owners Association / Homeowners Association information
11. If the new parsonage family has school-age children, provide copies of a letter on church letterhead stating the address of the church, the address of the parsonage, and the name of the new pastor. This may be needed for proof of residence in the school district. If the new pastor has small children and the church has a daycare, provide information about registration and any clergy discounts.

COVID-19 Documents

1. Any outstanding PPP (Paycheck Protection Program) forgivable loan or CARES Act documents, and the contact information for who is handling the accounting of these funds
2. Any COVID-response grants that might still need future reporting (e.g. funds to buy video equipment)