

TRANSITION CHECKLIST

Smooth transitions in pastoral leadership are vital for the health of the congregation and for a proficient beginning for the new pastoral leadership. Providing the following information will assist in a smooth transition and is an act of collegiality.

As an act of our covenant together, the exiting clergy and the S/PPRC are asked to complete this transition checklist for the newly appointed clergy. You may enlist the help of other church leadership.

Items to leave:

- Copy of mission/vision statement
- Most recent church conference booklet/paperwork
- Church directory
- Church e-mail list
- Church policies for weddings, funerals, building use, personnel, etc.
- Current and last two year's budgets
- Latest month's financial statement
- Church newsletters
- Bulletin for each worship service
- Bulletin for most recent Easter, Christmas Eve and any other special services
- Church keys
- Church profile

If there is a parsonage:

- Manuals for all appliances
- Names and phone numbers for plumbers, electricians, snow removal, lawn care, trash removal

Please answer the following as applicable.

Organization

- Are any staff positions currently vacant?
- Are any staff changes expected?
- What yearly events happen in this congregation, and where can information about them be found?
- Describe any committees/ministry teams that function differently than standard expectations.
- Is there a ministerial association? Contact information
- What agencies or individuals are used for emergency food, clothing, shelter, assistance, etc.?

Financial

- Is there a Stewardship Committee separate from the Finance Committee?
- Is there a year-round stewardship program?
- What is the number of pledging households?
- What is the number of non-pledging households?
- What is the average pledging household contribution amount, and what amount do the top 10% of the households give?
- How many households give less than \$50 per year to the church?
- Does the church have a Permanent Endowment Committee and/or Fund?
- What age group is the primary financial influence in the congregation?
- Where does the church have charge accounts?

Technology

- Is the church computerized? Networked? Internet accessed?
- What forms of computer technology are used in worship?
- Does the church rely on e-mail communication with the congregation?
- Does the church have a web page and if so, how is it maintained and developed and by whom?
- What are website and e-mail addresses and passwords?
- Does the church have its bookkeeping, membership and contribution system computerized? If so, who knows the software?

Communications

- How does the church communicate with its members?
- How does the church communicate with those it is seeking to attract (advertising)?

Worship

- Who is involved in planning worship (laity and staff)?
- What are the times of all worship services?
- Are any new services being planned?
- What is the primary role of the clergy and the laity in each service?
- What is the average worship attendance, is it increasing or decreasing, and why?
- What is the role of children and youth in worship?
- Is there children's worship in a separate area of the church building?
- What style(s) of worship are currently being offered?
- Where can special decorations (Christmas, Easter, etc.) be found?
- How is the bulletin prepared and who is involved?
- Is there a preferred style for communion?
- Are there ecumenical community worship events? When?

Pastoral Care

- What families/individuals are currently experiencing loss, illness, special needs?
- If there are inactive families that might benefit from a contact from the church, who are they?
- Who are the shut-ins/homebound, and how are they contacted?

Building

- How are building items (i.e. sound systems, musical instrument tuning, ordering supplies, safe deposit box, etc.) handled?
- What community groups use the building?

Checklist of Materials and Information to Leave Behind

The following are essential materials and information to be left in the church office or other convenient and safe place.

- 1. A good map of the city or community.
- 2. A current telephone directory.
- 3. An up-to-date city or county directory.
- 4. An up-to-date membership record, including names of children of members.
- 5. A database or other filing system with more detailed information of members and children, including pictures, if possible.
- 6. A supplementary mailing list including all friends of the church.
- 7. A list of sick and shut-in members with an indication of priority or urgency for visiting.
- 8. A list of prospective members, especially those most likely to join soon.
- 9. A list of officers of the church.
- 10. A list of church school officers and teachers.
- 11. A list of all organizations and officers.
- 12. A schedule of regular and special meetings of the congregation.
- 13. The church's constitution and bylaws.
- 14. The last annual report.
- 15. A current financial report and budget.
- 16. A list of programs and projects, special and ongoing, in effect or planned.
- 17. Goals, both short-range and long-range that the church has accepted and the methods used to achieve them.
- 18. Notes on special Sundays and traditions observed in the church.
- 19. A church history, if available.
- 20. A list of community agencies to which referrals may be made.
- 21. Attendance records.
- 22. File of Sunday bulletins.
- 23. File of church newsletters.
- 24. Notes on affiliations of the church with community, state, and national organizations.
- 25. A list of vendors with whom the church does business and/or has a charge account - attorney, florist, funeral director, printer, etc.
- 26. Operating instructions for church equipment, such as copy machine and computer.
- 27. A list of ministers available to preach during vacation or illness.
- 28. Information on securing credentials and parking permits for each area hospital or other public facility where pastoral duties are likely to take the pastor.
- 29. A key to every door of the church.
- 30. Policies and rules about use of church buildings and equipment.

Put these together in one place, if possible. Designate a responsible person to give this material to the successor. The pastor should go over some of the detailed materials with the designated person.