

Checklist for “Passing the Baton” Pastors in Transition Workshop

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, but will help you begin to gather the basics that will help the new pastor during the transition.¹

CONGREGATIONAL DOCUMENTS

- Copy of the church’s vision/ mission statement
- Most recent minutes of all-church conferences or meetings
- Church directory, annotated with information about relationships, pastoral care needs, and potential leaders
- Church email list
- Organizational chart
- List of church lay leaders and committee members and contact information
- Last Year’s Charge Conference Report
- Last Year’s Annual End of Year Statistical Report
- Congregational Profile completed by SPRC last August/January
- Church history statement
- Budget & Financials:
 - Current and last two years of budget reports
 - Latest month’s financial statement
 - Last three church newsletters
 - Outstanding large debts
 - Recent capital campaign materials
- Worship Life:
 - Recent bulletins for each worship service
 - Bulletins for most recent Christmas Eve and Easter services, as well as other special services that are routinely part of the church’s life •
- Church policies:
 - Weddings
 - Funerals
 - building use
 - Employee Handbook / Staff Personnel Policy (see staffing section below)
 - Financial Controls Policy/ Spending Restrictions
- Pastoral Care:
 - List of those in nursing homes or homebound
 - List of those struggling with long-term illness, grief, etc.
- Copies of any ministry or church brochures currently in use

¹ This list and the recommended questions are adapted 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.

STAFFING DOCUMENTS

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

SCHEDULE

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

OTHER ITEMS

- Church keys
- Passwords to church website, email, social media, digital services and accounts

PARSONAGE

- Keys
- Manuals for all appliances
- Names and phone numbers of plumbers, electricians, etc. that the church has approved
- Contact information for the parsonage committee chair (or trustee contact)
- Policies or Expectations relating to the parsonage (improvements, repairs, etc.)
- Trash service days
- Lawn care expectations
- Maintenance Schedule: HVAC contract, Pest Control, etc.
- Significant parsonage information: recurrent flooding, basement or HVAC issues, etc.
- Parsonage Property Owners Association information
- 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 will be needed for as 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.

“Passing the Baton” Meeting

Pastors in Transition Workshop

These questions are designed for a “passing the baton” handoff meeting between the incoming and outgoing pastor. They may be in writing, or included as part of the handoff meeting and church/parsonage tour. If needed, the SPRC Chair and Lay leader may need to be included in this or a similar meeting.²

ORGANIZATION

1. Are any staff positions currently vacant?
2. Are any staff changes needed or expected?
3. Describe any organizational process or structure that is unique to this congregation.
4. What agencies or resources are available for those who may call with needs for emergency food, clothing, shelter, or assistance?
5. Is there a ministerial association in the community?
6. Provide contact information.

FINANCIAL

1. What is the normal stewardship process at this church?
2. Who is in charge of promoting stewardship in the church?
3. What is the number of pledging and non-pledging households?
4. What is the average financial contribution of each member family to the church?
5. What are the purchasing restrictions and policies for pastor/staff/committees?
6. What is the pastor’s historical role in stewardship campaigns?
7. Does the church have a permanent endowment fund? What is it used for and how is it funded?
8. Are there any upcoming significant financial issues or significant facility needs?

TECHNOLOGY

1. Describe the church’s computer. Is it wireless?
2. Is the pastor provided with a computer? What kind?
3. Does the church communicate with the congregation primarily by email?
4. Does the church have a web page and, if so, who maintains it?
5. What are the appropriate passwords the pastor needs to know?
6. How will the pastor’s email be set up?
7. Who knows about the church’s membership and financial software?

COMMUNICATIONS

1. What is the church’s primary method of communication with its members?
2. What percentage of the church membership uses electronic communication (email, text, internet, etc.)?

² This resource adapted from the excellent appendix found in *Your Best Move: Effective Leadership Transition for the Local Church* by Robert Kaylor, Asbury Seedbed Publishing.

3. How often does the church newsletter come out? How is it distributed? What does the pastor need to prepare for the newsletter? What are the deadlines?
4. How does the church communicate with the community? What kind of outside advertising does the church do?

WORSHIP

1. Who is historically involved in planning weekly worship?
2. What are the times of all the worship services?
3. Are any new services being planned?
4. What is the role of clergy and laity at each service?
5. What is the average worship attendance at all services? Is it increasing or decreasing? Why?
6. What is the role of children and youth in worship? Is there children's worship during the main worship services? Is there a children's message in the service? Who does the children's message?
7. What styles of worship are currently being offered?
8. How is the bulletin prepared? Who is involved? What is the timeline for completion of the bulletin each week?
9. How does the church conduct the sacraments? When is communion offered and by what means?
10. Are there ecumenical community worship events? When?

PASTORAL CARE

1. What families are currently experiencing loss, illness, or special needs?
2. Who are the homebound members? Is there a regular ministry in place for them?

BUILDING

1. How are building items and maintenance handled? Who orders supplies?
2. Is there a custodian? Contract or staff? What are his/ her hours?
3. What community groups regularly use the building? When?

COMMUNITY / NEIGHBORHOOD COTTAGE MEETINGS

1. What is the status for planned cottage meetings or other gatherings for the intentional forming of relationships?
2. Who are the point people on SPRC (or other group) gathering the meetings and what is their contact information?

MISSION FIELD ENGAGEMENT

1. Are there any significant church controversies?
2. Are there any significant community/neighborhood controversies? How is the church currently involved or not involved?
3. How would you describe the congregational culture and "DNA":
 - a. Understanding of and relationship to the mission field
 - b. How the congregation makes decisions
 - c. Use of the church facility by members and the community
 - d. Unique ministry niche or narrative in the community