

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.