



Transition Process Checklist

For Congregations

Leadership Information

Congregation: _____

City: _____

Interim Pastor: _____

Start Date: _____ Phone: _____ Email: _____

Dean: _____

Phone: _____ Email: _____

Worship: Average annual worship attendance: _____

High Season: _____ Low Season: _____

Worship service time(s) and styles(s):

Assessment Process:

Dates: _____

Materials: _____

| TRANSITION PROCESS CHECKLIST (Seek to complete <i>before</i> forming a call committee) | | |
|---|--|--------------------------|
| Suggested documents are available at www.fbsynod.com/resources. | | |
| Administrative | | Checkbox |
| Date Completed ____/____/____ | Review “ <i>Walking Together through the Transition Process</i> ” Manual | <input type="checkbox"/> |
| Date Completed ____/____/____ | Council orientation – “ <i>Administrative Handbook: A Guide for Congregational Leaders</i> ” | <input type="checkbox"/> |
| Date Completed ____/____/____ | Membership roster updated | <input type="checkbox"/> |
| Date Completed ____/____/____ | Electronic roster data backed up and a regular back up process in place. | <input type="checkbox"/> |
| Date Completed ____/____/____ | “ <i>Policy on Sexual Ethics Related to Sexual Misconduct in Ministry</i> ” reviewed with leadership. | <input type="checkbox"/> |
| Date Completed ____/____/____ | “ <i>Vision and Expectations</i> ” reviewed with leadership. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Annual congregational (Parochial) report filed with the ELCA. Who, in addition to pastor, is responsible for submitting form? | <input type="checkbox"/> |
| Date Completed ____/____/____ | Congregational constitution last reviewed and approved: ____/____/____ Is it in line with the Model Constitution for Congregations? | <input type="checkbox"/> |
| Date Completed ____/____/____ | Website reviewed, updated and maintained | <input type="checkbox"/> |
| Date Completed ____/____/____ | Membership/visitor email database current. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Building: Risk management/safety/repairs/insurance review | <input type="checkbox"/> |
| Date Completed ____/____/____ | “ <i>Enrich and Transform</i> ” document reviewed. | <input type="checkbox"/> |
| Date Completed ____/____/____ | “ <i>A Safe Place for All God’s Children</i> ” brochure reviewed and displayed. Is there any follow-up needed? | <input type="checkbox"/> |
| Date Completed ____/____/____ | “ <i>Keeping the Church a Safe and Sacred Place for All, Responding to Sexual Misconduct</i> ” brochure reviewed and displayed. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Disaster Response Plan for the facility. | <input type="checkbox"/> |

| | | |
|----------------------------------|---|--------------------------|
| Date Completed ____/____/____ | Disaster Response Plan for congregation. | <input type="checkbox"/> |
| Date Completed ____/____/____ | MissionInsite (demographic data and evangelism tool) explored (www.fbsynod.com & search “mission insite”) | <input type="checkbox"/> |
| Financial | | |
| Date Completed ____/____/____ | Mission Support Date reviewed: ____/____/____ Contribution interval: _____ Percentage of budget: _____% | <input type="checkbox"/> |
| Date Completed ____/____/____ | Mission Support Covenant Form submitted to Synod Office (Due Jan. 31) | <input type="checkbox"/> |
| Date Completed ____/____/____ | Who, in addition to pastor, is responsible for submitting the Mission Support Covenant Form? | <input type="checkbox"/> |
| Date Completed ____/____/____ | Compensation Guidelines reviewed with the council. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Stewardship program reviewed and conducted/ongoing. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Books audited/budget reviewed. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Send in congregational financial reports to the Assistant to the Bishop for Administration, and the Assistant to the Bishop for Leadership. Financials will be reviewed to ensure congregation’s ability to fund a pastoral compensation package according to Compensation Guidelines and address provision for future sabbatical. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Endowment plan reviewed or explored. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Mission Investment Fund Investments thoroughly reviewed or explored. | <input type="checkbox"/> |
| Date Completed ____/____/____ | Claiming a clear identity in God’s call and mission (involve whole congregation). 1. <u>Living Lutheran Renewing Your Congregation</u> , Dr. David Daubert OR 2. A Ten-Step “How To” Process for your Congregation, or the Five-Step “How To” Process for Discerning Your Congregation’s Guiding Principles OR 3. Equipped for Ministry God’s Work Our Hands (Pr. Jon Keiser, facilitator) | <input type="checkbox"/> |

| Key Ministry Planning Areas | | |
|--|--|--------------------------|
| The items below are listed for discussion and ongoing action. Materials and resources noted are useful examples among many. | | |
| | Strategic process/programming: <i>Planning for Mission in God's World</i> , Natural Church Development, Healthy Congregations, <i>Living Lutheran</i> by Dave Daubert. | <input type="checkbox"/> |
| | Introduce leadership to Healthy Start for Congregations by New Beginnings Consulting (www.healthystartup.org). | <input type="checkbox"/> |
| | Review the Alban Institute book: "Discerning Your Congregation's Future" by Ray Oswald. Study chapters as needed. | <input type="checkbox"/> |
| | Regular leadership orientation/training: <i>Administrative Handbook for Congregational Council</i> (www.fbsynod.com), DVD's and other resources available at Synod Resource Center. | <input type="checkbox"/> |
| | Regular and continuing evaluation of the vision among the leadership/congregation. | <input type="checkbox"/> |

RETURN COMPLETED FORM TO:

- ***If form is completed online***, please save as a Word document in your computer and attach in an email to the Assistant to the Bishop for Leadership.
- ***If form is handwritten, please scan*** and attach in an email to Assistant to the Bishop for Leadership
- ***If your form is handwritten and you cannot scan*** the document, please fax to 813-870-0826, attention Assistant to the Bishop for Leadership.