



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):

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 ____/____/____	1. Reviewed “ <i>Walking Together through the Transition Process</i> ” Transition Manual (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	2. Council orientation “ <i>Administrative Handbook for Councils</i> ” (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	3. Membership roster updated	<input type="checkbox"/>
Date Completed ____/____/____	4. Electronic Parish Register data backed up and a regular back up process in place.	<input type="checkbox"/>
Date Completed ____/____/____	5. “ <i>Policy on Sexual Ethics Related to Sexual Misconduct in Ministry</i> ” reviewed with leadership. (Section 11: Additional Resources)	<input type="checkbox"/>
Date Completed ____/____/____	6. “ <i>Definitions and Guidelines for Discipline</i> ” reviewed with leadership. (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	7. Annual congregational (Parochial) report filed with the ELCA. Who, in addition to pastor, is responsible for submitting form?	<input type="checkbox"/>
Date Completed ____/____/____	8. Congregation’s constitution is updated with most recent ELCA amendments to the Model Constitution and is submitted to Assistant to the Bishop for Administration for review and approval by Synod Council. (See elca.org/About/Churchwide/Office-of-the-Secretary/Constitutions for the latest amendments)	<input type="checkbox"/>
Date Completed ____/____/____	9. Website reviewed, updated, and maintained	<input type="checkbox"/>
Date Completed ____/____/____	10. Membership/visitor email database current.	<input type="checkbox"/>
Date Completed ____/____/____	11. Building: Risk management/safety/repairs/insurance review	<input type="checkbox"/>
Date Completed ____/____/____	12. Reviewed “ <i>Enrich and Transform: Welcoming LGBTQ Candidates into the Call Process</i> ” (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	13. Reviewed “ <i>A Safe Place for All God’s Children</i> ” (Section 11: Additional Resources)	<input type="checkbox"/>
Date Completed ____/____/____	14. “ <i>Keeping the Church a Safe and Sacred Place for All, Responding to Sexual Misconduct</i> ” brochure reviewed and displayed. (Section 11: Additional Resources)	<input type="checkbox"/>

Date Completed ____/____/____	15. Disaster Response Plan for the facility.	<input type="checkbox"/>
Date Completed ____/____/____	16. Disaster Response Plan for congregation.	<input type="checkbox"/>
Date Completed ____/____/____	17. MissionInsite demographic data downloaded by congregation council for use in call process (see https://fbsynod.com/mission-insite/ for instructions on registering, logging into and navigating MissionInsite)	<input type="checkbox"/>
Date Completed ____/____/____	18. MissionInsite studied and discussed by congregation council regarding mission and ministry planning prior to call process.	<input type="checkbox"/>
Financial		
Date Completed ____/____/____	1. Mission Support Date reviewed: ____/____/____ Contribution interval: _____ Percentage of budget: _____%	<input type="checkbox"/>
Date Completed ____/____/____	2. Mission Support Covenant Form submitted to Synod Office (Due Jan. 31)	<input type="checkbox"/>
Date Completed ____/____/____	3. Who, in addition to pastor, is responsible for submitting the Mission Support Covenant Form?	<input type="checkbox"/>
Date Completed ____/____/____	4. Compensation Guidelines reviewed with the council. (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	5. Stewardship program reviewed and conducted/ongoing.	<input type="checkbox"/>
Date Completed ____/____/____	6. Books audited/budget reviewed.	<input type="checkbox"/>
Date Completed ____/____/____	7. 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 ____/____/____	8. Endowment plan reviewed or explored.	<input type="checkbox"/>
Date Completed ____/____/____	9. Mission Investment Fund Investments thoroughly reviewed or explored.	<input type="checkbox"/>

Date Completed ____/____/____	10. Conducted a Ministry Focusing Retreat with the congregation utilizing _____ as Leader/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.		
	1. Engaged with the Office of the Bishop for the Congregational Vitality Emphasis (fbsynod.com/vitality)	<input type="checkbox"/>
	2. Review the Alban Institute book: “ <i>Discerning Your Congregation’s Future</i> ” by Ray Oswald. Study chapters as needed. (Synod Resource Center)	<input type="checkbox"/>
	3. Regular leadership orientation/training: “ <i>Administrative Handbook for Congregation Councils</i> ” (fbsynod.com/resources/transitions)	<input type="checkbox"/>
	4. Regular and continuing evaluation of the vision among the leadership/congregation.	<input type="checkbox"/>
Yes { } No { }	5. This congregation has developed a strategic plan for the coming years.	<input type="checkbox"/>

Return this form and the Congregational Sustainability Assessment (Section 2, Resource D1) to the Assistant to the Bishop for Leadership:

1. By Email with attachments, or
2. By regular mail to:

Florida-Bahamas Synod, ELCA
Assistant to the Bishop for Leadership
3838 W. Cypress Street
Tampa, FL 33607-4803