



M I C H I G A N
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**LEAD PASTOR
CHECK-OUT LIST**

When a lead pastor transitions out of a church—whether through retirement, relocation, or a new calling—one of the most critical responsibilities is ensuring that the church is equipped with all the vital information necessary to move forward smoothly.

A pastoral transition is already a season of uncertainty for a congregation; lack of clear documentation and communication can multiply that uncertainty and hinder future health and momentum of the church.

Pastors must not take for granted the knowledge they've accumulated over the years—details about church operations, financial practices, key relationships, ministry rhythms, and legal matters.

Much of what the lead pastor carries is not written down, yet it is crucial for sustaining the ministry through a leadership change. By organizing and transferring this information with intentionality, a pastor honors the church, sets the next leader up for success, and models stewardship and integrity.

A well-prepared transition can be one of the final and most impactful acts of leadership a pastor offers.

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ITEMS FOR A LEAD PASTOR TO DO BEFORE HE/SHE LEAVES

Lead Pastor Check Out List

A Deacon Board can ensure a smooth transition by obtaining items and information from the exiting Lead Pastor before his or her departure. This will help maintain continuity and organizational stability. Here is a list of items to consider securing.

(The following items can be worked on by the exiting pastor and board together.)

1. Administrative and Operational Information

- **Church Records:** Ensure all church membership records, baptismal, marriage and funeral logs are up to date and accessible. This should include all legal documents.
- **Passwords and Keys:** Obtain passwords for church-related accounts (email, social media, website, computer, resource accounts, programs, banking, etc.) and keys to the church building, vehicles, and any other facilities.
- **Contact Lists:** A list of key contacts, including MMN leadership, church leadership and positions, vendors, and community partners.

2. Financial Information

- **Budget Overview:** A detailed review of the current budget, ongoing expenses, and any outstanding debts or loans.
- **Donation Records:** Ensure records of pledges, donations, and donor information are organized and accessible.
- **Pending Projects:** A summary of any financial commitments or projects in progress.
- **Bank Account:** Remove Pastor from the bank account and ensure multiple people are on it. Have the pastor turn in all debit and credit cards. Get a final bank statement as soon as the pastor leaves.
- **Financial Review:** Have a review of the finances completed once the pastor has left.

- **Severance:** To prevent misunderstandings, if there is a severance package or final gift for the pastor, have the agreement and amount in writing, signed by the pastor and board.

3. Legal and Organizational Documents

- **Constitution and Bylaws:** Updated copies of the church governing documents.
- **Licenses and Permits:** Records of any licenses or permits required to operate the church, including annual inspections or maintenance requirements.
- **Contracts:** Copies of agreements with vendors, contractors, or service providers.

4. Ministry and Program Documentation

- **Ministry Plans:** Notes about ongoing and planned ministries, including their goals and status.
- **Volunteer Schedules:** Updated schedules, job descriptions, and responsibilities for ministry leaders and volunteers.
- **Deacon Board Terms:** Make a list of when each deacon's term is up and when each deacon will reach their term limit.
- **Missions List:** Get an updated list of missionaries that the church supports including amounts. And any missions commitments that may not have started yet.

(The following items are created by the exiting lead pastor. The items can then be sealed in an envelope and placed in the desk or office for the next lead pastor)

5. Transition Notes

- **Vision and Goals:** The leaving pastor's insights about the church's long-term vision and direction. Suggestions or advice for working with particular staff, members, or ministries.
- **Key Issues:** Notes on unresolved challenges or sensitive matters within the church or congregation.

6. Pastoral Care Information

- **Member Care Notes:** Any non-confidential notes about congregants needing ongoing pastoral care or those in hospital or care facilities.
- **Community Relationships:** Information about key relationships with local organizations, charities, or leaders.

7. Personal Reflection

- **Exit Letter:** A letter of resignation from the leaving Lead Pastor.
- **Empty Office:** Ensure that everything is out of the pastor's office by their last day.
- **Church Analysis:** Create a list of the strengths and weaknesses of the church as a whole.