



CONSOLIDATED PASTORAL TRANSITION CHECKLIST

(Unified Sections I–X)

PASTORAL TRANSITION CHECKLIST

Outgoing Pastor • Incoming Pastor • Presiding Elder • Steward Board • Trustee Board

I. GOVERNING STANDARD

- Pastoral transitions are effective **on the date of episcopal assignment**.
- All authority of the outgoing pastor **ceases immediately** upon reassignment.
- All transition requirements must be completed **within thirty (30) days**.
- Failure to comply may constitute **maladministration, breach of fiduciary duty, or fraudulent representation**.

II. LEGAL, GOVERNANCE & HISTORICAL RECORDS

- Articles of Incorporation and bylaws
- Church constitution, policies, and operating procedures
- Property deeds, titles, surveys, insurance policies
- Contracts, leases, MOUs, service agreements
- Leadership rosters (stewards, trustees, auxiliaries)
- Last three (3) years of Annual Conference Reports**
- Last three (3) years of Quarterly Conference Reports**

III. FINANCIAL, BANKING & PAYROLL RECORDS

- Bank account listings, signatories, and authorizations
- Credit/debit card accounts and access
- Online banking credentials
- Financial statements and reconciliations
- Donor and restricted fund documentation

Payroll & Tax Compliance

- Payroll provider information and credentials
- Salary approvals and compensation agreements

- Housing allowance designations and resolutions
- W-2s, 1099s, 941s, 940s, state filings (current + prior years)
- Payroll tax deposit confirmations
- Record any payroll-related indebtedness in Quarterly Conference minutes

IV. PERSONNEL & EMPLOYEE DISCLOSURE

- Complete employee roster with salaries and classifications**
- Employment agreements or offer letters
- Funding source for each position
- Unpaid wages or accrued compensation disclosed and recorded

V. GRANTS, OUTSIDE INCOME & RESTRICTED FUNDS

- Written list of all grants and outside income sources**, including:
 - Grantor/funder
 - Purpose and restrictions
 - Award amount and term
 - Reporting requirements
 - Current balances
- Grant agreements, award letters, compliance reports

VI. MEMBERSHIP & PASTORAL CARE RECORDS

- Official membership roll** (active, inactive, new, transferred, deceased)
- Membership giving list** (prior three years)
- Sick and Shut-In list** with care notes

VII. VENDORS & OPERATIONAL CONTRACTS

- Complete vendor and contractor list**, including:
 - Service provided
 - Contract terms
 - Payment schedules
 - Automatic payments

Copies of contracts, invoices, and pending obligations

VIII. ADMINISTRATIVE & DIGITAL ACCESS

Church email accounts and passwords
 Social media admin access
 Website and hosting credentials
 Church management software access
 Keys, alarm codes, safes, vehicles, equipment

IX. CHURCH CALENDAR & MINISTRY SCHEDULE

Current and upcoming church calendar (minimum 12 months), including:

- Worship services
- Funerals and memorials
- Quarterly Conferences
- Board and committee meetings
- Special services and events
- Contractual or grant-funded programs

X. CERTIFICATION

We certify that this pastoral transition has been completed in full compliance with episcopal directive, denominational discipline, and fiduciary best practices.

Outgoing Pastor: _____ Date: _____

Incoming Pastor: _____ Date: _____

Presiding Elder: _____ Date: _____

Steward Board Chair: _____ Date: _____

2. FILLABLE TABLES & SCHEDULES

(Insert as appendices or forms)

A. Employee & Salary Roster

Employee Name Position FT/PT/Contract W-2/1099 Salary / Rate Funding Source Hire Date

B. Grant & Outside Income Register

Grantor/Funder Purpose Restrictions Award Amount Term Reporting Due Dates Balance

C. Vendor & Contractor List

Vendor Name Service Contract Term Payment Schedule Auto-Pay (Y/N) Contact Info

D. Membership Summary

Category	Count
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Active Members

Inactive Members

New Members

Watch Care

Transferred

Deceased

E. Sick & Shut-In List

Member Name Status Contact Info Care Notes

F. Church Calendar Snapshot

Date Event Location Notes / Obligations

3. PASTORAL TRANSITION BINDER INDEX

(Required for every congregation)

SECTION 1 – Episcopal Appointment & Transition Checklist

- Appointment letter
- Completed Pastoral Transition Checklist
- Certification signatures

SECTION 2 – Governance & Conference Reports

- Articles of Incorporation & bylaws
- Last 3 years Annual Conference Reports
- Last 3 years Quarterly Conference Reports

SECTION 3 – Financial & Payroll Records

- Bank accounts and signatories
- Payroll and tax documents
- Employee salary roster

SECTION 4 – Grants & Restricted Funds

- Grant list and agreements
- Compliance reports

SECTION 5 – Membership & Pastoral Care

- Membership roll
- Giving list
- Sick & Shut-In list

SECTION 6 – Vendors & Contracts

- Vendor list
- Contracts and invoices

SECTION 7 – Administration & Digital Access

- Email, website, software credentials
- Keys, security, assets

SECTION 8 – Church Calendar & Ministry Schedule