



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**.
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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**
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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
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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
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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
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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
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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
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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
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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
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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