

Administrative Checklist of Materials for the New Pastor

These items should be readily available for the new pastor as soon as he/she arrives in the office. Some of the information may be confidential so be sure to put it in a sealed envelope addressed to the new pastor and marked “Confidential.”

Pastoral Care

- List of those hospitalized, location of the patient, and reason for the hospitalization including any long-term issues
- List of those recently released from the hospital
- List of local hospitals and visiting advice or local protocols allowed to pastors
- List of shut-ins
- Recent deaths or other crises

Leadership

- List of officers (Including indication of their term and complete contact info)
- Meeting minutes for the past year
- Schedule of regular meetings
- Natural Church Development scores and process, notes, and contact info for coach
- Reports or results from any other church consultation
- Safe Sanctuary Policy

Membership

- Updated membership list
- List of new members and new persons received on “Profession of Faith”
- Spiritual Gift survey results
- New babies
- Names of families with pregnancies
- New marriage engagements and marriages

Office

- Access codes for all equipment
- Clean-up but don't clean-out the computer (leave pertinent files)
- Office hours
- Staff evaluations
- Schedule of office volunteers and contact info for each
- Newsletter schedule

Worship

- Bulletin schedule
- Worship team (including contact info) and responsibilities
- Normal production schedule for preparing for worship
- List of musicians (including contact info) and how often they participate in providing music for worship
- Normal holiday observances
- Special days (singings, decorations, etc.)
- Community-wide worship events and contact info for partnering pastors and churches

Finances

- Current financial statement and last two years of financial statements
- Listing of any debts or mortgages
- Latest pledge campaign information
- Check-writing procedure and schedule
- Requisition procedure and schedule

Trustees

- Lock-up procedures (alarm codes, etc.)
- Heating and cooling controls
Equipment contracts
- Contact info for needed repairs

Parsonage

- Chairperson's name and contact info
- List of current repairs or upgrades to the parsonage
- Location of important things
- Utilities (Do NOT Cancel the Utilities!!!)
- Access codes
- Whom to call for repairs

History & Tradition

- Community contacts and resources
- Listing of any groups that use the facility (including names and contact info for leaders)
- Full set of keys (and don't forget to turn ALL your keys in)
- List of positions where you have served in the community and your specific responsibilities
- List of prospective members and visitors
- Recruit a person or persons to help the new pastor identify inactive members who may be showing up to "check out" the new pastor and leave name and contact info for this person
- Indicate any traumas or significant events that have occurred in the last five years
- List of potential problems and difficult personalities (You may want to ask the new pastor if she/he would like you to do this)