

2017 INFO Pack   
Pastoral Transition Process

INFO-PAK

(Information for the Pastor’s Action Kit)

Every pastor who is leaving a church, along with the Pastor (Staff) Parish Relations Chairperson, is responsible to supply the following INFO-PAK to the incoming pastor. These items should be available as soon as possible, in order to facilitate a smooth transition.

Church Documents:

Alphabetical membership roles with address, phone, and email information.

Updated 2017 Directory of Officials, (with contact information and updates of most recent elections)

2015 and 2016 Church Conference Reports

2015 and 2016 Year End Statistical Reports

2015, 2016 and 2017 Budgets & Treasurer’s Report & 2017 to date (Later updated to June 30th)

2016 Detailed Attendance & Stewardship records & 2017 to date (Later updated to June 30th)

A summary of attendance and stewardship records for the last 5 years.

2015 and 2016 Financial Audits & Complete Current list of all accounts and liabilities

2015 and 2016 Worker’s Compensation Audits

Pastoral Transition Audit

Pastoral Contact Information

Complete church directory with address, phone, and email information

Most recent pictorial directory

Most recent prayer list and list of “concerns & joys”

List of shut-ins and those with handicapping conditions

List of prospects and recent visitors to the church activities

County and municipal map

Contact information for location and custodians of church papers and assets

Information for Conducting Church Business

Detailed staff information (people, hours, job descriptions, etc.)

Complete set of labeled keys, combinations, codes

All codes and passwords (fire, alarms, computers, etc.)

Equipment & supplies information

List of services supplied to church and parsonage (with contact information) & all church contracts

Church petty cash, church accounts, discretionary accounts and charge cards information

Church calendar – with special emphasis on previously planned events

2016 & 2017 Bulletins (typical, communion, holidays, special Sundays) (guest & emergency preachers)

2016 & 2017 Church newsletters, congregational mailings and e-blasts.

Helpful Neighborhood Information

Post offices

Food (Grocery stores, eat-in, take-out, convenience)

Auto repair shops

Medical assistance (emergency care, hospitals, doctors, dentists, vets, etc.)

School information

Directions & warranties (with service & repair information) for all church & parsonage equipment

List of parsonage information (i.e., emergency switches, thermostats, etc.)

Trash, recycling and bulk days

Lawn care & snow removal information

**Some Interesting “Conversation Topics” For Church Groups**

(Some Things Your Church & All New Pastors Will Want To Discover)

***When any group gets together they share ideas, information, insights and opinions. Sometimes we miss opportunities to intentionally direct our conversations toward topics that could produce helpful data for our church. Here are some topics that most people find invigorating. Often the results of these discussions are enlightening. Surely every new pastor wants to know the answers to these questions. The list might be helpful to your church.***

1. **What is the context of our ministry?**
   1. What is happening in the congregation?
   2. What is happening in the community?
   3. What are the trends for both?
   4. Who is our constituency? (Those for whom we are responsible)
2. Geographic, economics, education, ethnicity, etc.?
3. Areas of concern, special populations, etc.?
4. How do our demographics compare with the community?
5. **Identity**
   1. Who are we as a congregation?
6. Religious perspective?
7. What is our history?
   1. Do we have a vision for our future?
   2. What has changed about us?
   3. Where are we headed? Where do we hope to head?
   4. What are our leadership needs?
   5. What needs to be done? What changes must we make?
8. **Program / Ministry**
   1. What is our understanding of worship?
   2. What are our ministry priorities, with benchmarks and timelines?
   3. Where are we addressing ministry needs? Where are we not addressing them?
   4. Do we focus on member needs of or those in the wider community?
   5. How do we understand ourselves as a United Methodist congregation?
9. **Process**
   1. How do we make decisions?
   2. What are our communication networks?
   3. What are our leadership styles?
   4. What are our norms for behavior?
   5. What are the informal networks of power?
10. **Helpful Information**
    1. What do the census studies say about our ministry opportunities?
    2. Church data – who really “knows” and how is information shared?
    3. What are the programs of our church and who makes it happen?
    4. What are Our Stories?
    5. Interviews with community leaders – Who do they say that we are?
    6. Do we have an inventory of present and potential leadership (a talent bank)?

**50 Ways to Welcome your New Pastor or Associate Pastor**

From the Lewis Center for Church Leadership Prepared by Robert Crossman

# Prepare to welcome your new pastor

* 1. Open your hearts and decide that you are going to love your new pastor.
* 2. Begin praying daily for the new pastor and family, even as you continue to pray for your departing pastor and family.
* 3. Invite church members individually to send cards of welcome and encouragement to the incoming pastor.
* 4. Know that welcoming your new pastor in genuine and effective ways lays the ground work for a healthy and vital relationship and the development of stable, long-term ministries together.
* 5. Plan for the transition. Occasionally important welcoming gestures are missed with everyone thinking someone else is handling these details.
* 6. Appoint a specific liaison person to whom the pastor can go for help and information during the transition.

# Say goodbye to your current pastor in a healthy way

* 7. Show love, regard, and even grief, for your departing pastor. This is one of the best things you can do for the new pastor.
* 8. Acknowledge the change in public ways. Especially in the case of a much-beloved pastor, this allows the congregation better to let go and receive the new pastor.
* 9. Provide the congregation the opportunity to say thank you and goodbye to the outgoing pastor, even if things have not always gone well.
* 10. Find appropriate occasions — in worship and at other times — to thank the outgoing pastor.
* 11. Express appreciation in ways that are consistent with what you have done in the past.
* 12. Consider giving the pastor the last two weeks off. This helps the pastor enter the new situation rested and gives an emotional buffer between one pastor’s last Sunday and another pastor’s first Sunday.
* 13. Plan goodbye celebrations prior to the beginning of the two weeks off.
* 14. Provide information to the local media about the outgoing pastor’s accomplishments and future plans.
* 15. Do not invite the former pastor to return for wed-dings, funerals, or baptisms. This allows your former pastor to engage fully with his or her new congregation, and it establishes your new pastor as everyone’s pastor from the beginning.

# Make things move-in ready

* 16. Make sure the parsonage and pastor’s office are clean and ready. Offer to provide help or a cleaning service if needed.
* 17. Determine if the parsonage is in need of repairs or painting. Consult the outgoing and incoming pastors about timing so as not to disrupt the lives of either party. Do not ask a new pastor to move into a parsonage “under construction.”
* 18. Consult the new pastor on any paint, design, or furnishings issues.
* 19. Offer to have someone cut the parsonage grass.
* 20. Make sure the new pastor and church officials are clear on how moving expenses are paid and all matters related to compensation, benefits, and reimbursement policies.

# Welcome your pastor on moving day

* 21. Stock the parsonage refrigerator and pantry with some staples.
* 22. Make sure there are kid-friendly foods and snacks in the refrigerator if children are arriving.
* 23. Have a small group on hand to greet the new pastor and family when they arrive and to help as needed.
* 24. Offer child care if there is an infant or toddler in the household.
* 25. Invite children in the household to do things with others of their same age.
* 26. Welcome any youth in the household by having church youth group members stop by and offer to show them around.

# Continue the welcome during the entry period

* 27. Take food over for the first few days. Many churches continue the practice of having a “pounding” for the new pastor when persons bring food items.
* 28. Provide a map with directions to local dry cleaners, grocery store, drug store, veterinarian, etc., and information on local options for internet and cable television providers.
* 29. Give gift certificates to several of your favorite restaurants in the community.
* 30. Give the pastor and family a welcome reception on the first Sunday.
* 31. Plan a worship celebration of the new appointment.
* 32. Invite the new pastor to any social events held by Sunday School classes or other groups in the early months.
* 33. Make sure the pastor’s spouse and children, if applicable, are invited to Sunday School and other appropriate small groups.
* 34. Continue to remember your new pastor and family in your daily prayers.

# Help the new pastor become familiar with the congregation

* 35. Introduce yourself to the pastor repeatedly! You have one name to learn; your pastor has many names to learn.
* 36. Wear name tags. Even if name tags are not a tradition, the congregation can wear them for a few weeks to help the pastor learn names.
* 37. Provide a current pictorial directory of all the church members, if available.
* 38. Provide an up-to-date list of all church committees and officers.
* 39. Provide the new pastor with a tour of where things are kept inside the church and perhaps a floor plan of the facilities.
* 40. Orient the new pastor to information systems and the way records are kept.
* 41. Make sure the pastor has a list of home bound or nursing home members, a list of those struggling with long term illness, and a list of those still in grief over recent deaths in the family. Better yet, take the pastor for an introduction to each of these households.
* 42. Have an appropriate person offer to go with the pastor for introductions and support if there are particularly urgent pastoral situations (a member near death or the family of a member who has just died).
* 43. Have a lay official offer to take the pastor to meet church members in their businesses or other work settings, if they are easily accessible.
* 44. Offer to help arrange small group sessions to meet and talk with the congregation.
* 45. Create a “church yellow pages’” (a list of people in the church who have specific skills that a newcomer may find beneficial…. auto mechanic, doctor, dentist, dry cleaners, book store, office supply, etc.).

# Help the new pastor connect to the community

* 46. Provide local media with information about the new pastor.
* 47. Provide a list of hospitals, nursing homes, and community service agencies.
* 48. Introduce your new pastor to other clergy in the community. Provide information on any ecumenical activities or associations.
* 49. Introduce the new pastor to public and community leaders.
* 50. Ask church members in civic clubs to take the new pastor to one of their meetings.

**A History Sharing Experience**

**An interesting experience in a congregation that has received an incoming** **pastor is a time for history sharing. It is a time for persons in the congregation to gather, to share stories of their life together and to reflect on what it means for the congregation at this time. It makes a great fellowship activity. Such an experience can be helpful to the church and the incoming** **pastor in several ways:**

1. Assists the inclusion process. The pastor becomes one of us when he/she knows our stories.
2. Shares key events in the life of the church.
3. Provides insights into past successes and failures.
4. Informs all to the pastors of the past and who in particular is the one by whom the current pastor will be judged.
5. Assists the incoming pastor and leaders to assess what the meaning of all of this is for the congregation.

**Arrangements:**

1. Set aside about a three-hour block of time for discussion.

(It always goes well with a potluck supper.)

1. Have a listing of previous pastors and dates available.
2. Put up a 20-foot length of newsprint that can be used to create a time line. Have a newsprint pad in addition for recording reflections.

**Process:**

1. Enter the dates and pastors across the top, allowing enough room for writing information below their names.
2. Ask the group questions to:

* What are the most important happenings when each pastor was here?
* What are the implications of the successes, e.g. a new worship service?
* How do the failures affect us today?
* Where are the high points in the congregation’s life? The low points?

1. Probe for meaning statements. This can be done as a total group if it is small. Otherwise, have them break into groups of 6-8. Collect the following responses on newsprint.

* General observations
* What do you make of this?
* What concerns you?
* What tells you who you are?
* What are your key strengths?
* What should be a part of your future?

1. If the group has done “c” well, prioritize the meaning statements. It becomes part of the process to come to terms with their history.
2. Answer the questions “What does this say about our future?”

* Develop goals to build on our strengths – stretch toward new ministry.
* Develop strategies to overcome weaknesses – let go of what doesn’t work.

Special Services

Farewell Service:

On the current pastor’s last Sunday in a church (or other chosen date), there should be an appropriate farewell service, in which the pastor can express his/her thanks for the time shared with the congregation and the congregation can prayerfully bid their pastor farewell.

Installation Service:

On the incoming pastor’s first Sunday in a church (or other chosen date), there should be an appropriate installation and welcoming service, in which the pastor can express his/her initial vision for the congregation and the congregation can have the opportunity to express a hospitable welcome.

Re-Appointment Service:

If there is no pastoral change, on the first Sunday of a new conference year the congregation and pastor should engage in an appropriate “anniversary” – i.e., Re-Appointment celebration, in which the pastor can express his/her visions for ministry in the coming year and the congregation can welcome him/her back to the church for a new conference year.

Note: It is suggested that liturgy in the \*Book of Worship and other resources may be used to provide guidance for these services.

\* Farewell p. 598-599

\* Installation p. 595-598

\* Re-Appointment p. 595-598