

## CHECKLIST FOR DEPARTING PASTOR

*This checklist is provided to assist resigning/retiring pastors, congregational leaders, and the congregational secretary in confirming that the congregational records are in good order, that there is knowledge of the location of important documents, and that any unfinished business has been identified.*

### Certification of Updated Parish Records

#### PARISH RECORD BOOK: Are the following records up to date?

Baptisms       Deaths       Weddings       Communion  
 Confirmations       Transfers In       Transfers Out       Others

#### PAROCHIAL REPORTS

Annual parochial records are kept where?  
 Are they current and have they been submitted to the Synod office on a yearly basis?  
 Where are the Pastor's records kept?

Although the following items are not required for completing the *Certification of Updated Parish Records* they are very helpful to have conversation about before the pastor leaves.

#### RECORDS OF MEMBERSHIP: Are there lists of the following and where are they kept?

Members in Good Standing       Members in College  
 Inactive Members       Members in Military Service

#### POTENTIAL MEMBERS/MEMBERS

Is there any prospect list? Where?       Any adult baptism or adult instruction potentials?  
 Any families needing infant baptism?       Catechetical instruction list. What are next steps?  
 Any Pre-marital Counseling sessions coming up? \_\_\_\_\_  
 Any Weddings scheduled? \_\_\_\_\_

**CHURCH COUNCIL RECORDS**

- \_\_\_ Current year's minutes                      \_\_\_ Past year's minutes                      \_\_\_ Committee Reports
- \_\_\_ Parish goals, long range plans                      \_\_\_ Unfinished council business

**CONGREGATIONAL RECORDS:** List the locations of:

- \_\_\_ Minutes of most recent Congregational Meeting(s): \_\_\_\_\_
- \_\_\_ Church Archives: \_\_\_\_\_

**PARISH CORRESPONDENCES**

- \_\_\_ Where are correspondences kept? \_\_\_\_\_
- \_\_\_ Any Pending matters? \_\_\_\_\_

**FINANCIAL CONCERNS:** Where are the following documents/records located?

- \_\_\_ Financial records \_\_\_\_\_
- \_\_\_ Bank Accounts (who manages them?) \_\_\_\_\_
- \_\_\_ Endowments \_\_\_\_\_
- \_\_\_ Deeds \_\_\_\_\_
- \_\_\_ Insurance Policies \_\_\_\_\_
- \_\_\_ What is the process for paying bills?

**PASTORAL CARE**

- \_\_\_ List of persons in need of ministry
- \_\_\_ Particular problems needing attention
- \_\_\_ List of Shut-ins and locations