



## Transition Checklist Checklist for Parish:



### Announcement of Change at the parish – normally made by current pastor/pastoral leader:

\_\_\_\_\_ Announcement of departing pastor/pastoral leader to **parish staff**

When? \_\_\_\_\_

\_\_\_\_\_ Announcement of departing pastor/pastoral leader to **parish leadership**

How? \_\_\_\_\_ Letter \_\_\_\_\_ Email \_\_\_\_\_ Meeting

When? \_\_\_\_\_

\_\_\_\_\_ Announcement of departing pastor/pastoral leader to **parishioners**

How? \_\_\_\_\_ Letter \_\_\_\_\_ Email \_\_\_\_\_ Weekend Masses

When? \_\_\_\_\_

\_\_\_\_\_ Letter of introduction of new pastor/pastoral leader in parish bulletin.

When? \_\_\_\_\_

### Parish staff and leadership:

\_\_\_\_\_ Bulletin/website announcements regarding leaving of departing and coming of new pastor/ pastoral leader – for several weeks

\_\_\_\_\_ Plan farewell celebration of departing pastor/pastoral leader

When? \_\_\_\_\_

What? \_\_\_\_\_

\_\_\_\_\_ Parish gift for departing pastor/pastoral leader? Do parishioners contribute to it, and, if so, how?

\_\_\_\_\_ Review of rectory condition. Updating needed? If so, when?

\_\_\_\_\_ Review of procedures during transition time:

\_\_\_\_\_ Emergencies after hours

\_\_\_\_\_ Handling of money, check signing, etc.

\_\_\_\_\_ Locking and unlocking buildings for events

\_\_\_\_\_ Discussion as to better ways of doing things

\_\_\_\_\_ Departing pastor/pastoral leader meets with parish staff to discuss transition questions

\_\_\_\_\_ Incoming pastor/pastoral leader possibly meets with parish staff (once)

\_\_\_\_\_ Diocesan official possibly meets with parish staff (usually if change in type of leadership)

\_\_\_\_\_ Review of rectory and church items which belong to parish and those which belong to departing pastor/pastoral leader

Who reviews with departing pastor/pastoral leader? \_\_\_\_\_

\_\_\_\_\_ Update documentation of rectory furnishings belonging to parish

By whom? \_\_\_\_\_

\_\_\_\_\_ Coordination of payroll dates between new/old parishes for outgoing and incoming pastor/pastoral leader by parish bookkeeper

\_\_\_\_\_ Updating of insurance and retirement for new pastor/pastoral leader by parish bookkeeper, secretary or business manager