**Stages Checklist**

The following checklist has been created especially for all those OCD detail types on every church board or committee☺. Actually, it is a handy guide to ensure that no important steps are left unattended. It is categorized under headings that correspond with each of the twelve stages of the pastoral search process. It may help your team stay focused on tasks and objectives along the journey. Using the checklist in the pdf manual.

**Stage 1: Pre-search Preparation**

After your pastor announces they are leaving, have a board meeting before they leave and update and freeze the membership roster.

Board to send current paid pastoral and support staff a letter stating appreciation and requesting them to stay on during the transition time, but not committing to long-term employment. See “Letter retaining paid pastoral and support staff” in Sample Letters appendix.

Select the Pastoral Search Team (PST) according to your bylaws. Give them the PST Job Description and receive a commitment from your selections to be on the team. See the appendix “Pastoral Search Team Job Description.”

Make enough copies of this transition resource and require the board/PST members to read the numbered chapters before the retreat. (Include other resources such as the church’s constitution and bylaws.) Email digital copies of this resource to all board/PST Members, requesting them to download it to a laptop and bring it with to the retreat for easy referencing.

Set a date for a two-day board/PST retreat or two half-day planning meetings. Retreat/meetings to be planned even if all cannot attend.

Secure a venue for the retreat that is at a nearby hotel or bed and breakfast. Make plans for meals.

Listen to podcast entitled, “Episode 3: Common Mistakes Pastoral Search Committees Make” at <https://soundcloud.com/rmmnriseup>.

Board officers will determine the retreat schedule.

Board officers should meet at least a day before the retreat to plan the agenda and game-plan through a pre-meeting huddle. See appendix section entitled, “Board/Search Team Planning Retreat.”

Determine what kind of vote is desired for different decisions. See chapter 6 entitled, “The Pastoral Search Team.”

Board/PST will determine individual roles for pastoral search committee such as team lead (chair), secretary, communications lead, prayer lead, networking lead, and hospitality lead.

Write a church/community profile and pastoral profile. See the appendix entitled, “Church, Neighborhood, & Community Profile” and “Pastor Profile.”

Review of biblical qualifications and characteristics form and discuss common denominators the board shares regarding your future pastor. See the appendix entitled, “Desirable Qualities of a Pastor.”

Determine a search budget and transition fund for the pastoral search process. See the appendix entitled, “Transition Budget.”

Group reviews, explains, and signs the “Board/Pastoral Search Team Commitment.” See Appendix D), confidentiality agreement and the consequences of a breach of confidentiality.

Group to determine meeting frequency, location, and time. See chapter 8 entitled, “Search Team Meeting Sample Agenda.”

The board/PST should share their completed profiles with the network superintendent and seek their advice.

Consider securing the services of an interim pastor for the duration of the pastoral search process. See the chapter entitled, “Do We Need an Interim Pastor?”)

Activate the 40-day prayer initiative and call the church to prayer. See Appendix section, “Mobilizing Prayer.”

The church should contact the network office with the name, address, and phone number of the chair of the pastoral search committee so proper communication may be maintained.

Determine if you will do a sustainability initiative. See Appendix section “Sustainability Initiative” for details.

**Stage 2: Advertising the Opening**

Board/PST to complete the church biography/profile by **APPOINTING** a team to write the church profile describing your church, the neighborhood, and the city.

Attach this profile for each candidate to review online or through an email.

Visit <http://www.agspe.org/rutour.mp4> for a sample and short video tour of how Highpoint Church in Aurora, Colorado did this.

Board/PST to complete a candidate job description by establishing reasonable expectations of the new pastor and looking for key leadership abilities needed for the church.

Use online ministry job sites to advertise the pastoral opening for at least five months and cancel the ad when no longer needed. See the appendix entitled, “Advertising the Ministry Opening.”

Inform officials from other networks and influential people of your opening. See the appendix entitled, “Advertising the Ministry Opening.”

Consider hiring a research assistant to gather data needed for advertising.

The acting chairperson for the search committee should email the network superintendent periodically to update them on your progress and receive help with references.

**Stage 3: Seek Counsel**

Board should compile a list of questions to ask the network superintendent throughout the process.

Invite the network superintendent to attend a church board meeting, offer resources, and answer questions the board may have.

Email community leaders such as the town mayor, city council members, police and fire chiefs, school superintendent, principals of nearby schools, and your city’s neighborhood services department letting them know of the pastoral opening. See Chapter 3, “Stages of the Process” for a sample list of questions to be emailed to leaders.

Create a congregational survey through [www.surveymonkey.com](http://www.surveymonkey.com), use the Network’s template from our “[Digital Resources](https://www.wyomingministrynetwork.com/pastoral-transition/)”, or pass out a paper survey for input concerning the pastoral selection. See compilation of questions for this in the appendix entitled, “Congregational Survey.”

**Stage 4: Targeting Potential Candidates**

Board will need to be proactive and recruit possible candidates and respond to them if they are interested. See the “Letter to Recruited Candidate Who Expresses Interest” in the Sample Letter appendix.

Prioritize a list of possible candidates and those interested initially.

Contact possible candidates through a phone call unless they emailed you first. See the appendix entitled, “Recruiting Candidates”.

**Stage 5: Receiving Résumés**

A letter or email should be sent within three days to all candidates who have submitted their names and résumés. See “Letter to Acknowledge Receipt of Résumé.”

Every committee member should be emailed/given a copy of every résumé for evaluation.

Begin the process of organizing the candidates’ résumés in categories A, B, or C with each category decision to be made by an official vote of the board/PST:

“A” = Strong candidate to contact and explore.

“B” = Possible candidate to be revisited or considered later.

“C” = Unqualified or undesirable candidate to be notified immediately.

For candidates from the “A” category, the acting chair of the Pastoral Search Committee is to send an email or letter requesting they complete a candidate questionnaire Request to Complete Pastoral Questionnaire), the questionnaire itself (Candidate Questionnaire), a brief description of the process, and the background of the history of the church (Church, Neighborhood, Community Profile).

“B” category candidates can be considered later. Place “on hold” until the board feels they merit reconsideration. If the board finds that a “B” category candidate merits consideration, they must be notified immediately and be sent/emailed the letter and information mentioned for “A” category candidates above.

“C” category candidates are considered undesirable for the position. Send a letter or email thanking them for applying and informing them that the board feels led to move in a different direction. See “Letter to Non-Selected Candidates.”

**Stage 6: Ministry Exposure and References**

Assign a committee member to check the potential candidates’ church or personal social media outlets. Also, Google the candidates' names to try to find any valuable information on them. See the appendix entitled, “Checking References.”

Board/committee will listen to and/or watch the candidates’ sermons and report back impressions to the entire pastoral search committee. See the appendix entitled, “Exposure to Speaking Ministry.”

Choose one to three committee members with good people skills and disarming demeanors to make contacts for reference calls. See the appendix entitled, “Checking References” and the “Reference Interview Form.”

Request your Network Superintendent to contact the primary candidate’s district/network superintendent to get a verbal reference over the phone. See the “Superintendent Interview Form" in the “Checking References” appendix chapter.

**Stage 7: Preliminary Phone Interview(s) (Audio Only)**

Board/PST contact candidate requesting a preliminary phone conversation.

Listen to the podcast entitled, “Episode 7: Five Keys to a Successful Pastoral Candidate Interview” at <https://soundcloud.com/rmmnriseup>. Maintain a positive attitude within the board and committee during every interview.

Consider providing current financials and a signed statement by the board officers verifying their truthfulness and accuracy. In addition, include a bio on each board member, their level of current ministry involvement, education, and history with the church.

Board should be prepared to answer questions from the candidate. See the appendix entitled, “Interview Questions for Board/PST’s.” Plan for time in the interview for the candidate to ask questions.

Board should create a list of questions they want to ask the pastoral candidate as a group See appendix entitled “Interview Questions for Candidates” for questions for the **first phone interview**. They should also discuss and have a plan BEFORE an interview takes place. Assign different members of the board to ask questions at an appropriate time and place in the interview. ***Be sure to ask all of the questions in section 4. Doctrine and Personal convictions. You want to hear them verbalize answers to these questions.***

Suspend judgments until interview is completed.

Consider asking the candidate to respond in writing to a list of 8-10 questions (do not include every question from phone interview #1,) prior to another interview. These questions would be some that you did not have a chance to ask. See the appendix entitled, “Interview Questions for Candidates.”

Debrief for about 20 minutes as a group upon conclusion of the interview.

As interviews take place, send notifications to those interviewed who are no longer of interest. See “Letter to Candidate Dismissed After Interview.”

2nd Phone Interview

If still interested in the candidate, board/PST contact them requesting a second phone conversation.

Board should create a list of questions they want to ask the pastoral candidate as a group See appendix entitled “Interview Questions for Candidates” for questions for the **second phone interview**. They should also discuss and have a plan BEFORE an interview takes place. Assign different members of the board to ask questions at an appropriate time and place in the interview.

Suspend judgments until interview is completed.

Debrief for about 20 minutes as a group upon conclusion of the interview.

As interviews take place, send notifications to those no longer of interest. See “Letter to Candidate Dismissed After Interview.”

**Stage 8: Video Interview with the Entire Committee with the Candidate & Spouse**

Background checks should be done on the final three candidates and their spouses before the final candidate is chosen. Secure written consent from candidate(s) before performing a background check. A sample one is at the end of the appendix section entitled, “Checking References.”

Video interview should be the third interview and use video conferencing software to help identify the candidate’s ministry focus, leadership style, and overarching ministry focus. It should include questions concerning reflective learning, roles and governance, change, ministry preferences, and leadership.

When contacting candidates for the video interview make sure that their spouse will be joining them in the interview. Also ask the candidate if they would like to submit a list of questions for the board/PST to respond to during the interview. If the candidate does, set a deadline for them to be sent to you to prepare your responses.

Board/committee should narrow down a list of questions for the candidate before the video interview meeting. See the appendix entitled, “Interview Questions for Candidates,” Interview #3: Video Interview.

Interviews are a two-way street. A sharp candidate will also want to interview the committee. Accommodate time for this. This is a good time to share your answers to the candidate’s written questions sent to you beforehand.

Use an online meeting application such as gotomeeting.com, apple facetime (iPhone or iMac), zoom.com (the free version limits you to only 40 minutes so you want the paid version), or google hangout. See Stage 8 in the chapter entitled, “Stages of the Search Process.”

Test video equipment well before the video interview to make sure it is working.

Plan BEFORE the interview. Select questions as a group, in the order they will be asked, and by whom.

Plan time to debrief as a group after each interview for about 15-20 minutes. Then take time to pray and reflect upon the interview before making a final decision about the candidate.

**Stage 9: Contextual Visit – Board/PST to visit and review preaching/teaching of candidates**

Be sure to confirm the candidate is preaching on the date you plan to visit.

Send two to three people from the board and pastoral committee to make an anonymous visit to hear candidates live in their current church setting. You want more than one person to hear the message since everyone has different tastes and opinions. The goal of the anonymous visit is to see, hear, and get a feeling for the candidate in their local ministry setting. It is best to arrive separately and sit away from each other.

No contact should be made with the candidate, nor should they receive prior notice.

View the outside of the facility after hours. How does the landscaping and exterior of the building look?

If possible, a board member or team of at least three should make anonymous visits to “A” list pastoral candidates’ current churches.

**Stage 10: Personal Interviews**

The board/search team devises a written remuneration agreement that lays out the compensation and benefits of the position. It should be approved by the full board in the form of a motion and signed by its officers. It may be presented to candidates before they come to the face-to-face interviews or to your final candidate that you select after the face-to-face interviews. See appendix entitled, “Presenting a Remuneration Agreement.” Moving expenses budget should also be discussed and including in this package.

Choose two to three potential candidates along with the candidates’ spouse (and family if they desire) to interview at different times at the church’s expense. Larger churches should bring in at least three candidates for a face-to-face interview at different times before narrowing it down to one candidate.

Though these should have already been done, the board/PST is to complete any background, credit, criminal, and educational reference checks before making any contact about the personal interview. You don’t want to find out a surprise after you have invited and made travel arrangements. Make sure the candidates and their spouse have signed the background check release form.

Set up a date and time to formally interview the pastoral candidate and the candidate’s spouse. Entire board, their spouses, and pastoral committee should be involved so make sure the date works for all of them if possible.

Make travel arrangements for the candidate and the candidate’s spouse (and family if needed). If out of state, purchase airline tickets for them all. If driving, send an appropriate travel allowance for gas.

Set up hotel and expense accommodations for them.

Set up childcare for the interview if needed.

Plan a loose itinerary that will accomplish goals. Be sure part of it is for the candidate and spouse to tour the building and grounds of the church.

Face-to-face interview includes entire board & PST, the candidate, and the candidate’s spouse to discuss significant issues not previously discussed. Plan and assign members questions from the appendix entitled, “Interview Questions for Candidates,” Interview #4: Face-to-face Interview.

Give candidate/candidate’s family an opportunity of margin to explore the city, pray together, and reflect upon their visit.

Plan an informal social time with deacons and their spouses.

Do not commit to an individual until all critical information has been collected, reviewed, and prayed about.

Board/PST should be prepared and expect candidates to interview them. They may request a copy of the church’s current financials and a signed statement by the board officers verifying their truthfulness and accuracy.

After the couple leaves the building, plan to take 15-20 minutes to debrief. Then take time to pray and reflect upon the interview before making a final decision about the candidate.

**Stage 11: Official Candidacy**

***Make sure the remuneration agreement has been signed by the candidate and returned to the search team before coming to candidate***.

Set up a schedule for the candidate to be voted on and make travel arrangements for the candidate and the candidate’s spouse and family. If out of state, purchase airline tickets for candidate and the candidate’s spouse and family. If driving, send an appropriate travel allowance for gas, food, etc.

Set up hotel and expense accommodations for them

Announce your business meeting to elect a pastor in the timeframe listed in your bylaws. Also mail to your membership the “Notification of Candidate to the Body” letter and set out copies for the body to pick up.

Schedule and promote a Saturday dessert social at 2 p.m. at the church for the congregation to interact with the candidate and the candidate’s spouse and family.

Set and announce a deadline for Q&A questions to be submitted so they can be screened and given to the candidate well before the Q&A session.

On Sunday, schedule enough time for the candidate to preach a full message and give them an adequate introduction before speaking. A PST member should emcee the service, not the candidate.

Provide any needed childcare for candidate’s children during interviews and services.

Prepare for the business meeting. See WMN website “[Digital Resources](https://www.wyomingministrynetwork.com/pastoral-transition/)” for the document entitled, “Chairing a Business Meeting.”

If the candidate is elected and accepts the position, have them sign the employment contract that you have already customized for the position. See WMN website “[Digital Resources](https://www.wyomingministrynetwork.com/pastoral-transition/)” for the document entitled, “Employment Contract Template.”

**Stage 12: Preparation**

Provide an official letter confirming remuneration package for temporary housing/lending company for family.

Before the pastor arrives and starts, record in the minutes of a board meeting the amount of housing allowance and the ministry expense reimbursement. Use the exact wording found in the appendix “Preparing for the Pastor’s Arrival,” Look at the section B. 3. a. Housing Allowance and b. Ministry Expense Reimbursement.

If there is a parsonage, it should be cleaned and inspected to determine repairs and redecorating that may be needed. These should be done while the parsonage is vacant. Consult with the new pastor and their spouse on decorating choices (paint and carpet colors), as this will be their home.

Appoint a transition team of non-board members to help with logistical needs for the pastor’s relocation.

Schedule a welcome day and be sure their office is ready beforehand.

Provide the needed technology, like a computer that is set up with needed programs and access, cell phone, keys, alarm codes, email, office orientation, password list and an onboarding meeting to help them adjust and answer any questions. Be sure to discover the pastor’s preferences for technology needs.

Write a press release and post to all social media outlets and the church’s website and notify local press. Include brief ministry history, education, etc.

Notify the network superintendent within one day of election process. In the “Sample Letters” section of the appendix seed “Notification to network.”

Provide a budget for moving/rental expenses before the elected pastor asks what will be provided and before they secure a moving company or rental truck. If the church cannot afford a moving company and will use a rental truck, provide a check beforehand to the new pastor for this expense.

Provide a list of key leaders’ contact information (staff, board members, ministry leaders, and anyone else needed) via email as well as a printed copy.

Create a welcome team to help the family move in, assemble beds, organize furniture, and get settled their first week. They should be conscientious, not reckless.

Welcome basket to include disposable cups, plates, plastic ware, paper towels, etc., to help with their first few days in a new home.

Prepare a referral list of service providers such as realtors, doctors, contractors, mechanics, schools, hairdressers, clubs, sports programs, and utility providers.

Do not set appointments or speak on behalf of the pastor/pastor’s family regarding service providers. Let them make their own choices.

Sunday hospitality: Assign one or two people to host the pastor’s family to help orient them, get their children placed in the appropriate classrooms, sit by them in church, and introduce them to others. The host person should initiate contact a few days before Sunday and set up a time and place to meet at the church on Sunday morning.

Begin transfer of church leadership authority and responsibilities from the board to the new pastor.

The committee must sort through all materials such as résumés, reference letters, confidential notes, correspondence, background checks, and names of unsuccessful candidates and destroy confidential information accordingly. It is unethical to hold onto personal information of those not elected.

Inform any candidates that have not yet been notified that you have elected a pastor.

Begin to prepare and support the pastor’s preference for an installation service. The new pastor (not the board or church) should select a date and order of service for their installation service.

Maintain a consistent way to show appreciation to the pastor and the pastor’s family. Consider once a year during Pastor Appreciation Month in the morning service(s). Church attendees need to see their pastor and the pastor’s spouse being honored and their work appreciated.

Need housing and ministry reimbursement amounts in official board minutes before the Pastor begins. Obtain those figures from your newly elected pastor. See appendix “Preparing for the Pastor’s Arrival” for the language needed.

The new pastor is added to financial accounts and legal documents and issued a church credit card.