Church Leadership Transition Checklist

A practical handoff tool for pastors, elders, executive pastors, ministry directors and key volunteers

Use this before, during and after a major staff or volunteer transition. The goal is simple: preserve knowledge, reduce uncertainty, protect volunteers and give the next leader a healthy starting point.

1. Before the Announcement

■ Confirm the departure date, transition timeline and decision-making authority.

■ Identify who must be informed first and who will deliver each message.

■ List ministries, teams, projects and responsibilities affected by the transition.

■ Identify immediate risks: upcoming events, payroll/vendor issues, volunteer gaps or access problems.

■ Create a single transition coordinator or small transition team.

2. Knowledge Transfer

■ Document weekly, monthly, quarterly and annual responsibilities.

■ Record key contacts: volunteers, vendors, community partners and ministry partners.

■ Inventory church-owned accounts, devices, keys and access permissions.

■ Transfer passwords through the church's approved secure password system - never a printed handbook.

■ Capture current projects, deadlines, unresolved decisions and commitments already made.

■ Record recurring meetings, reports, budgets and approval processes.

3. Ministry Documentation

■ Create or update quick-reference guides for affected ministries.

■ Include opening/closing procedures, Sunday routines and emergency contacts where appropriate.

■ Document volunteer scheduling and communication processes.

■ Save templates, forms, graphics and recurring documents in a shared church-owned location.

■ Make sure documentation belongs to the church rather than one person's personal account.

4. Communication Plan

■ Tier 1: brief direct leadership and key staff first.

■ Tier 2: meet with core volunteers and team leads with enough context to answer practical questions.

■ Tier 3: communicate clearly with the congregation.

■ State what is known, what is still being decided and when the next update will come.

■ Use consistent language across leaders to reduce conflicting information.

■ Provide an appropriate point of contact for questions.

5. Volunteer Stabilization

■ Identify volunteers most likely to inherit additional work.

■ Assign interim responsibilities with clear limits and an end date or review date.

■ Do not assume the most dependable volunteer can absorb the entire gap.

■ Check in personally with key volunteers during the transition.

■ Keep essential ministry routines as consistent as reasonably possible.

6. Interim Leadership

■ Name who has authority for daily decisions.

■ Define which decisions can wait for the permanent leader.

■ Clarify spending, scheduling, personnel and ministry-change authority.

■ Create a short weekly transition check-in for unresolved issues.

■ Track temporary decisions so the incoming leader understands what changed and why.

7. Incoming Leader Onboarding

■ Provide the ministry handbook, calendar, key contacts and open-project list before or at onboarding.

■ Schedule listening meetings with staff, volunteers and key ministry stakeholders.

■ Give the leader time to observe before expecting major changes.

■ Clarify success expectations for the first 30, 60 and 90 days.

■ Establish who will answer historical or operational questions during the handoff.

8. 30 / 60 / 90-Day Handoff

■ **Days 1-30:** Listen, observe, learn relationships and understand existing systems.

■ **Days 31-60:** Identify gaps, clarify roles and address urgent operational problems.

■ **Days 61-90:** Begin measured improvements with appropriate leadership alignment.

■ At day 90, review what is working, what remains unclear and what documentation should be updated.

Transition Notes

Date / Deadline	Owner	Next Action