

Pastoral Transition Audit

The pastoral transition audit is designed to establish a baseline for new ministry and to help ensure that there is an appropriate accounting for ministry. The following questions are to be completed by the new pastor in consultation with the former pastor and emailed to the Regional Administrator by July 1. If you are an associate pastor, the senior pastor is to complete the form and review it with the associate pastor. An updated report should be provided by September 1, 2023.

1. Average worship attendance reported in the statistical report submitted to the conference for 2022. _____
Average worship attendance for the first six months of 2023. _____
2. How often did the Staff Parish Relations Committee meet during 2022? _____
How many times has it met since January 1, 2023? _____
3. How often did the Church Council meet in 2022? _____
How many times has it met since January 1, 2023? _____
4. Does the pastor have a discretionary account? ___ Yes ___ No
If yes, was there an internal audit by the Staff Parish Relations and Finance Chairpersons of the accounting at the time of the pastoral transition? ___ Yes ___ No
If no, an audit is to be conducted immediately.
5. What percentage of shared ministry was paid from January 1 to June 30, 2023? _____
6. What percentage of direct bills (pension, health, and property insurance) was paid from January 1 to June 30, 2023?

7. What percentage of shared ministry and direct bills are anticipated to be paid by the end 2023? _____
8. Are there any financial concerns within the congregation? ___ Yes ___ No
If yes, please describe.

9. All healthy congregations engage in appropriate disagreement that has some level of conflict. It is not unusual to experience level one and even level two conflict. Read the statements of conflict below and indicate the level within the congregation. My assessment is that the church is a level _____ conflict.

Definitions:

Level One: There's a problem to solve in the church, and people may disagree about how to solve it. But they believe they can work it out, and they are committed to try. They are talking directly to each other, not withholding information. As a result, most people don't call this conflict. They say, "We've got problems to solve, but we can do it."

Level Two: The focus shifts from solving the problem to caring for myself. People feel, we've got a problem to fix, but I don't want to be associated with it. I'm going to be cautious, armor myself, plan before I talk to the pastor. I'll talk with other people, but not share fully all I know about the situation. People are nervous, which you can tell because they generalize everything: "We're not communicating. There seems to be low trust around here. There are some difficulties with the choir." But they don't describe the problem specifically. The role of the pastor, then, is to get people talking.

Level Three: Again, the objective has changed. It's no longer, "Fix the problem", or "Protect myself;" it's "Win." People feel, you must accept my solution. It's win or lose. I'm not contributing to the difficulty; I'm the good person who has the only possible answer.

The language in such cases is not only vague, it also overstates, distorts, and dichotomizes the conflict. For example, "Pastor, the whole church is out to get you. We are split down the middle. A few bad apples should not be in the church at all. They're never going to change."

People are not yet in factions, but they clump together, and we give them labels: "The pastor's buddies," "the old pillars of the church."

The pastor's role is to create a safe environment for people to air concerns and start solving the, which means thinking a lot about who should be in what conversations and how we can affirm people and hear their concern.

Level Four: People are no longer satisfied with getting their way. Now they have to get rid of the opposition. The goal is a "divorce"—getting people to quit coming to church, firing the pastor, or disbanding a committee or ministry. People are now in factions, usually meeting in homes. There is a clear leader, sometimes two, who gives marching orders to each faction.

At this level, it's wise to get outside help: denominational officials, a consultant, a skilled pastor or lay leaders from another congregation.

Level Five: People won't settle for getting people to leave; now they want to remove them from the face of the earth. In a church, the people are not satisfied with a resignation; they want to have the pastor "defrocked."

10. What additional information is it important for the superintendent to be aware of?

Name of Church: _____ Date Submitted: _____

Name of pastor reviewing the form: _____

If there is an associate pastor, has the form been reviewed with the associate pastor?

Yes No

Names of church leaders who have reviewed the form:

_____	_____
_____	_____
_____	_____
Outgoing Pastor	SPRC Chairperson
_____	_____
	Incoming Pastor

A copy of this report should be provided to the outgoing pastor, the incoming pastor, the SPRC and the Regional Administrator by July 1, 2023. An updated report should be provided by September 1, 2023.