



The Episcopal Diocese of Western North Carolina

Clergy Leave-Taking Helpful Checklist

1. With the wardens, review all leadership positions. Clarify roles and responsibilities.
2. Update job descriptions for paid staff. For each paid staff person, there should be a confidential personal file containing a job description and all evaluations.
3. Meet privately with individuals with whom there may have been tensions of conflict
4. Be clear that any commitments (baptisms, weddings, funerals) you have scheduled for immediately after your leave-taking date will be done by the Interim Rector.
5. Review with the wardens and vestry their leadership responsibilities for property, finance, and administration during the transition
6. Facilities
 - a. Describe renovations that need to take place
 - b. Make a list of routine maintenance that takes place or needs to
 - c. Tidy spaces that will benefit the incoming clergy
7. Identify those in nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity
8. Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain confidentiality of the matter that are the pastorally sensitive. Assist wardens in making arrangements for temporary emergency pastoral coverage for the time immediately following your departure. This information should be left in writing (in a sealed envelope) for the interim priest and may be delivered by the senior Warden or by the Canon to the Ordinary.
9. Note preplanned funeral arrangements and where the information is filed.
10. Prepare a calendar for the upcoming year including Episcopal visitations, homecoming, patronal feast, sunrise service, graduations, every member canvas, stewardship, and annual meeting.
11. Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events
12. Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years, and by law.
13. Finances
 - a. Meet with treasurer and with wardens
 - b. Clarify record keeping
 - c. Make sure audits are up to date and filed
 - d. Make a list of any special funds, their purpose, use and signatories.
14. Identify the location of the safe and who knows the combination

15. Recordkeeping
 - a. Provide an accurate parish list
 - b. Make sure parish registers are up to date and accurate, i.e. baptism, confirmation, burial, marriage
16. Work on Memorial fund
 - a. Review and make policy regarding
 - b. Explain the difference between endowment and "Board Designated" funds
 - c. Empower the vestry/committee to reject gifts when necessary
 - d. Provide role clarification i.e., who makes the policy and who carries it out
 - e. What are the unwritten rules?
17. Identify the location of the bank deposit and who has the keys
18. Preserve historic document
19. Locate your by-laws to be incorporated.
20. Clean out personal files. Keep what you need and carefully dispose of the rest
21. Prepare file of service leaflets for the past three years. Prepare a file of Eucharistic Ministers and visitor certificates, list of current altar guild members, ushers, acolytes, and service with contact information (phone numbers and e-mail addresses)
22. Describe unique parish customs for the conduct of worship - especially weddings, funerals, Easter, Christmas, Pentecost, and All Saints
23. Prepare a file of current agreement and contact information for all groups that use the buildings
24. Note the location of home communion set, chrism, last year's palms, the nativity set etc.
25. As a kindness to your successor (whether interim or settled) leave a notebook --not a 'how to' but a 'where to.' Where to get good take-out food, get a good haircut, find a dentist, etc.
26. Create a contact list of parish leaders including roles and email addresses
27. Turn in your keys, clearly tagged
28. Establish a date certain for moving out of church-provided housing
29. Encourage and emphasize hospitality for welcoming new clergy and their loved ones
30. Let people say good-bye, thank you and give you their blessing