

UWM TRANSITION TEAM GUIDELINES & ELEMENTS

"The way a minister leaves a ministry and the way the leadership and congregation supports the leaving in the ensuing months will strengthen a spiritual community or leave so much unfinished business that it will take the new minister a year to clean-up the debris."

- Loren Meade

Transition Time:

It is important for the community to take ownership and participate in the transition process as they move from one minister to the next.

Intention:

To provide the ministry with a seamless and unified transition between the minister leaving and the new minister coming in.

To work seamlessly and in unified manner with a Transition Ministry Specialist/ Consultant (TMC/S).

Goals:

- To provide support to the board and TMC/S in time of transition between spiritual leadership.
- To assure the integrity of the vision and mission is upheld.
- To use this transitional time to grow spiritually.

Guidelines

This team shall exist from the time the minister leaves until the new minister disbands it.

It is ideal for this team to work under the guidance of a TMC/S from UWM.

The transition team shall be made up of at least one board member and the chairs of ministry team within this ministry that will work within these guidelines.

Procedure

Celebrate, when possible, the minister's leaving.

For example:

- Create a farewell ceremony in order for the community to bless and have closure with minister (and spouse if applicable)
- Create a circle where each person can share a word or phrase of appreciation for minister
- Recognize that minister cannot serve without the support of their spouse, so recognize and bring spouse into the circle for a Unity Blessing

Prior to minister leaving, if possible, hold an exit interview with the Minister (done by Board Member or TMC/S if already selected)

Also, do exit interview with the board
Collate results and debrief with board.

Send a one-page summary of these interviews, to UWM for ministry files.

Just prior to, or immediately after the minister leaves, the Transition Team (if this the route the Board chooses) shall be created with the support of TMS/C, if possible.

The team reports to the board, until the TMC/S is hired and/or on board, and then the team reports to the TMC/S.

This team shall meet weekly (or, as deemed necessary) to share updates as to their areas of responsibility in order to provide a seamless transition.

The Transition Team shall consist of vetted leaders in the community to share, collaborate and support one another. While working as a team, each member will have a specific area of responsibility. These shall be published and communicated to the congregation:

Possible Choices for Transition Team Composition & Areas to Support

- TMS/C/ Transition Team Chair
- Board Member Liaison
- Staff/HR/Administration
 - o Staff support, Day-to-day financial administration oversight
- Worship Team/Sunday Service
 - o Scheduling speakers, music coordination, point of contact for volunteers on Sunday
- Pastoral Care
 - o Visitations, prayer (not pastoral counseling; refer to credentialed professionals)
- YFM
- Facilities
- Finance
- Education/Classes
- Special Events
- Hospitality
- Marketing & Technology

Roles and Responsibility/Job Description

The transition teams job description is as follows and is carried forth as directed by the TMS/C or designated chair:

Each member of this transition team shall work in accordance with their original job description and shall provide input as to the accomplishment of that job description at each weekly meeting:

Each member of the team provides a short but detailed weekly report, in writing, that describes the activities that their team has accomplished this past week and projections of major activities in the coming weeks.

Collectively this team will assure that all functions, elements and initiatives of the day-to-day operations of the ministry shall be carried forth in a seamless and unified manner.

This team is different than the Search Team and thus, has different roles and responsibilities. This team shall have no responsibility or relationship with the Search Team. Each should have separate members.

This team shall sign a covenant similar to the Boards.

Communication to the Community

During times of change and transition it is important for the Board/Leadership to communicate the status of what is going on within the ministry, with the spiritual community, and to utilize a variety of modalities to do this, and do it over and over, and then one more time.

Tasks for Transition Time

- ___ Discuss transition plan
- ___ Discuss staff and their job descriptions
- ___ Discuss board members
- ___ What is scheduled on the church calendar in the future
 - Speakers
 - Singers
 - Workshops
 - Classes
- ___ Go through files
- ___ Get a copy of all church business files from previous minister's computer
- ___ Who has keys to the building?
- ___ Who has keys to each room in the building (including leased/use space rooms)?
- ___ Who has keys to storage building?
- ___ Any off-site storage that belongs to the church?
- ___ Who has access code to the building?
- ___ Who manages website and email
- ___ Create email account for new minister
- ___ Identify all contractors for service (name, phone number, and address):
 - Lawn Care
 - Cleaning person (interior)
 - Toiletry Supply company
 - Phone service
 - Electricity
 - Horizon Magazine
 - Mortgage company
 - Printer repairs
 - Server and Network Maintenance
 - Piano/Organ Tuning

- Pest control company
 - HVAC company
 - Special Bulletins and Stationery
 - Printing Service for seasonal mailings
 - Others?
- ___ Acquire name/phone number of any speakers, singers, or special guests that are available
- ___ Document financial process from offering to bank
- ___ Document financial process from bank to bill paying
- ___ What are the passwords to all applications?
- Web Administration
 - Constant Contact
 - Quick Books
 - Zoom Account Administration
 - Others?
- ___ Make new minister's access/rights the same as prior minister
- ___ Who has church credit cards?
- ___ Document Payroll process
- Who are the employees
 - Salary and terms for ALL who get paid
 - Who are 1099 vendors (like musicians)
- ___ Document the process/policy for creating and signing manual checks
- ___ Document financial process for weekly balancing
- ___ Payment amount and process for guest speakers, singers, and workshop presenters
- ___ Receipt of payment and process for renting out space for activities, memorials, and weddings
- ___ Petty cash process
- ___ Document financial process for monthly balancing
- ___ Document monthly financial reporting process for the Board
- ___ Board Agenda and Meeting Minutes process
- ___ Add new minister's name to all church bank accounts
- ___ Set up login/password for all church bank accounts for new minister
- ___ Add church credit card for new minister
- ___ Identify bank account manager name, phone number, and address
- ___ Process for ordering UWM materials
- ___ Process for ordering special bulletins and stationery
- ___ Assist previous minister in packing her books to take with her.

- ___ Complete financial process for monthly balancing
- ___ Complete monthly financial reporting process for the Board
- ___ Complete financial process for weekly balancing
- ___ Discuss Gift cards process and accountability
- ___ Discuss process for Bookstore sales and ordering
- ___ Location of Policies, Procedures, and Job Descriptions
- ___ Location of prior Board Meeting Minutes
- ___ Complete financial process for weekly balancing
- ___ Previous minister removes anything personal from minister's hard drive
- ___ Set new minister up for access/email/remote desktop access/all printers on Minister's computer
- ___ Complete financial process for weekly balancing
- ___ Complete monthly financial reporting process for the Board
- ___ Delete previous minister's access to all applications
- ___ Delete login/password for previous minister's access to church bank accounts
- ___ Remove previous minister's name from all church bank accounts
- ___ Retrieve church credit card from previous minister