

Seven-Stage Search Roadmap and Action Tracker

Full-size companion resource • Print additional copies as needed. Keep candidate-specific information in restricted, secure storage.

Purpose: Make the process visible and assign ownership to every important action. The stages describe decision gates, not an inflexible calendar. Some activities may overlap.

Church: _____ Search leader: _____

Recruitment authorization date: _____

The Seven Stages

Stage	Required output	Gate or authorization
1. Prepare	Charter, assessment, position profile, budget	Recruitment authorized
2. Identify	Recruitment channels and candidate pipeline	Prospects may be approached
3. Screen	Evidence of initial eligibility and interest	Approval to interview
4. Evaluate	Structured interviews and ministry assessment	Finalists selected
5. Verify	Authorized references and necessary checks	Material concerns reviewed
6. Recommend and call	Supported recommendation; required approvals	Call authorized, then offered
7. Transition	Accepted call, handoff, first-year plan	Search team formally closes

Do not identify a candidate as Called or Accepted simply because the team has made a recommendation. Chapters 2–5 explain the responsibility attached to each gate.

Action Tracker

Task / decision	Owner	Due date	Status / evidence
Approve charter	_____	_____	_____
Complete readiness assessment	_____	_____	_____
Approve position profile and budget	_____	_____	_____
Launch recruitment	_____	_____	_____

Confirm screening and interview gates	_____	_____	_____
Complete verification	_____	_____	_____
Submit recommendation	_____	_____	_____
Authorize call, if applicable	_____	_____	_____
Complete transition handoff	_____	_____	_____

Team Meeting Agenda

Date: _____ Facilitator: _____

1. Opening prayer and purpose of the meeting
2. Completed assignments since last meeting
3. Candidate pipeline changes requiring action
4. Evidence or decisions requiring group review
5. New assignments with named owners and due dates
6. Matters requiring church leadership approval
7. Next meeting and closing prayer

Decisions recorded (including who was authorized to decide):

Action owner and next date: _____

Brief Church Leadership Update

Reporting period: _____ Stage: _____

Completed milestones: _____

Material delays or resource needs: _____

Approvals requested: _____

Next anticipated milestones: _____

Do not circulate unnecessary confidential candidate details in general updates.