

Pastoral Candidate Pipeline Tracker

Full-size companion resource • Print additional copies as needed. Keep candidate-specific information in restricted, secure storage.
Purpose: Keep one accurate and access-controlled record of every candidate, with a responsible owner and a documented next step.

Master Candidate Register

Candidate ID	Source	Stage	Owner	Last contact	Next action / due
P-001	_____	_____	_____	_____	_____
P-002	_____	_____	_____	_____	_____
P-003	_____	_____	_____	_____	_____

Keep candidate names, contact information, notes, and sensitive documents in a secure record linked to the ID. Avoid distributing an unrestricted spreadsheet containing personal histories or background findings.

Standard Stage Definitions

- Identified: A potential candidate has been found, but not contacted.
- Researched: Preliminary lawful and appropriately obtained information has been reviewed.
- Contacted: An authorized outreach message was actually sent.
- Interested: The candidate has expressed interest in further conversation.
- Applied: The agreed-upon application materials were received.
- Screening: Preliminary requirements and mutual interest are being reviewed.
- Shortlisted: Authorized advancement to structured interviews has occurred.
- Interviewing: Formal interviews or preaching assessments are underway.
- Due Diligence: Authorized references or verification are underway.
- Finalist: Candidate has been approved for final consideration.
- Recommended: Team formally submits its recommendation to the authorized body.
- Called: Church has authorized and formally extended the pastoral call.
- Accepted: Candidate has communicated acceptance under agreed terms.

- Declined: Church has closed the candidacy after an actual decision.
- Withdrawn: Candidate chose to stop participating.
- Future Consideration: No longer active; retention requires appropriate basis and permission.

Individual Candidate Record

Candidate ID: _____ Candidate contact owner: _____

Candidate's authorized contact method: _____

Source and introduction date: _____

Stage and date entered: _____

Documents received: _____

Evaluations completed: _____

Reference permission and restrictions: _____

Last actual contact and channel: _____

Next required action: _____

Owner: _____ Due: _____

Status decision and approving person/date: _____

Evidence supporting stage advancement (fact versus candidate report):

Unresolved questions, stored only in restricted record: _____

Operating Rules

- ☐ Update status only after the event has occurred, not when someone intends to do it.
- ☐ Record decision-maker, date, evidence, and next action.
- ☐ Use one designated communication coordinator.
- ☐ Confirm permissions before confidential outreach or references.
- ☐ Limit access and use a documented retention and deletion procedure.