

Pastor Search Team Charter and Role Assignments

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

Purpose: Authorize a defined team, establish how it works, and clarify what authority remains with church leadership or the congregation. Complete this resource before accessing candidate information.

Team Charter

Church: _____

Position: Senior / Lead Pastor

Search authorized on: _____

Authorizing body: _____

Charter approved on: _____

Our Mission

Our Pastor Search Team exists to identify, evaluate, and recommend a biblically qualified candidate who is prepared to shepherd this congregation. We will approach the assignment with prayer, confidentiality, honesty, clear responsibilities, and accountability to our church's governing documents.

Team Membership and Responsibilities

Function	Name	Backup
Team leader	_____	_____
Candidate research and sourcing	_____	_____
Candidate communication	_____	_____
Candidate evaluation and verification	_____	_____
Administration and records	_____	_____
Church leadership liaison (if different from leader)	_____	_____

The team leader coordinates meetings, handoffs, assignments, and communication with the authorizing church leadership. The candidate communication coordinator is the candidate's primary point of contact. One person may hold more than one role, but each function needs an owner.

Decision Authority

Decision	Who may recommend?	Who approves?
Launch recruitment	_____	_____
Advance applicant to interview	_____	_____

Approve finalist	_____	_____
Present recommendation	_____	_____
Extend formal pastoral call	_____	_____
Approve call terms	_____	_____

Governing document and section confirming these rules: _____

Required notice, quorum, voting threshold, or denominational approval: _____

If an answer is unclear, secure a governing decision before moving forward.

Team Commitments

- ☐ We will use the approved qualifications and position profile, not personal favoritism.
- ☐ We will disclose relevant conflicts of interest and determine appropriate recusals.
- ☐ We will not contact a candidate's current church or confidential references without authorization.
- ☐ We will keep candidate materials in the approved restricted location.
- ☐ We will distinguish facts, candidate statements, reports, and concerns in our notes.
- ☐ We will not promise a position or call before authorized approval and acceptance.
- ☐ We will communicate decisions promptly and respectfully.

Meeting cadence: _____

Decision procedure: _____

Restricted record location: _____

Authorized record custodians: _____

Issue escalation contact: _____

Team leader signature: _____ Date: _____

Church representative: _____ Date: _____

Church Readiness and Ministry Needs Assessment

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

Purpose: Describe the congregation as it actually is, not merely as members hope it will become. Complete this assessment with accurate records and appropriate input from church leadership and members.

Church: _____ Assessment date: _____

Prepared by: _____ Approved by: _____

Part 1: Our Identity

Our church's mission and ministry convictions:

Essential doctrinal commitments and denominational affiliation:

Three strengths we want to preserve: 1. _____ 2. _____ 3. _____

Part 2: Our Present Condition

Area	Evidence or description	Source / date
Weekly attendance and trend	_____	_____
Membership and engagement	_____	_____
Financial capacity	_____	_____
Staff and volunteer health	_____	_____
Discipleship and pastoral care	_____	_____
Community mission and outreach	_____	_____
Relationships and unresolved conflicts	_____	_____
Governance and leadership roles	_____	_____

What do church leaders agree about? _____

Where do expectations differ? _____

What does the church need to address regardless of whom it calls? _____

Part 3: What Will the Next Pastor Inherit?

Recent pastoral transitions or significant leadership changes (factual summary):

Existing commitments, difficult relationships, or unresolved operational issues:

Resources and support available to the incoming pastor:

Part 4: First-Year Priorities

Ministry priority	Why it matters	Support available
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Avoid promising that a pastor can guarantee numerical growth or fix every challenge alone.

Part 5: Readiness Decision

- ☐ **READY:** The church has approved doctrine, governance, role expectations, and compensation parameters sufficient to recruit honestly.
- ☐ **READY AFTER ACTIONS:** Recruitment may start after the specific actions below are completed and approved.
- ☐ **NOT READY:** Significant questions about authority, ministry expectations, resources, or unresolved concerns require attention before recruitment.

Actions to resolve: _____

Owner: _____ Due date: _____

Authority confirming readiness: _____

Date of confirmation: _____

Pastoral Position Profile and Opportunity Announcement

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

Purpose: Define the position for evaluation, then present it accurately to candidates. The internal profile should be approved before any public announcement is released.

Part 1: Internal Pastoral Position Profile

Church and location: _____

Position title: Senior / Lead Pastor

Accountable to / works with: _____

Authorizing leadership body: _____

Employment arrangement: _____

Biblical and Doctrinal Requirements

Our understanding of applicable pastoral qualification passages (for example, 1 Timothy 3:1–7; Titus 1:5–9; 1 Peter 5:1–4):

Adopted doctrinal statements and nonnegotiable convictions:

Required ordination, licensing, or credentials, if any: _____

Required Ministry Responsibilities

- ☐ Biblical preaching and teaching
- ☐ Pastoral care and shepherding
- ☐ Discipleship and equipping believers
- ☐ Leadership development and appropriate supervision
- ☐ Collaboration with elders, council, deacons, or governing leaders
- ☐ Community engagement and evangelism
- ☐ Other church-specific responsibilities: _____

Three essential ministry competencies (demonstrated readiness, not merely preferences):

1. _____ 2. _____ 3. _____

Preferred experience (not an automatic disqualifier): _____

Governance and Support

Pastor may decide independently: _____

Decisions requiring other approval: _____

Staff, volunteer, financial, and administrative support: _____

First-year priorities (from Appendix B): _____

Compensation and Search Conditions

Approved compensation range: _____

Housing, benefits, insurance, and retirement considerations: _____

Relocation and ministry-expense arrangements: _____

Candidate travel or interview expenses: _____

Position-profile approval/date: _____

Confirm applicable tax, employment, and denominational rules with qualified advisors. Do not use family status, age, health, or other unrelated personal characteristics as informal substitutes for job-related requirements.

Part 2: Public Opportunity Announcement Template

SENIOR / LEAD PASTOR | [CHURCH NAME] | [CITY, STATE]

About our church: [A concise, accurate description of mission, doctrinal identity, congregation, and community.]

Our current season: [Why the position is open and the opportunities and challenges the next pastor will enter. Do not disclose private personnel matters.]

The position: [Essential responsibilities, accountability relationships, and expectations.]

Essential qualifications: [Biblical and doctrinal requirements and role-related competencies.]

Compensation: [Approved range or clear explanation of the process.]

To apply: [Application link or instructions; résumé, ministry testimony, doctrinal responses, preaching samples, and other genuinely necessary materials.]

Search contact: [Approved candidate communication contact]

Application review timing: [Honest estimate if one exists, not a guarantee]

Approval and Publication Check

- ☐ Matches the approved internal role profile
- ☐ Compensation parameters are approved
- ☐ Governance and responsibilities are accurate
- ☐ Confidential church or candidate information is excluded
- ☐ Search leader and authorized church leadership have approved publication

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.

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.

Initial Candidate Screening Worksheet

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

Purpose: Decide who meets the preliminary criteria and warrants deeper assessment. This is not a final character investigation or theological examination.

Candidate ID: _____ Reviewer: _____

Date: _____ Position-profile version: _____

Part 1: Essential Initial Requirements

Mark each Meets / Unresolved / Does Not Meet based on the evidence available.

Initial criterion	Result	Evidence / follow-up
Essential doctrinal compatibility	_____	_____
Stated pastoral eligibility criteria	_____	_____
Required credentials, if applicable	_____	_____
Relevant preaching / teaching background	_____	_____
Basic readiness for this position	_____	_____
Mutual interest in exploring	_____	_____

Part 2: Brief Screening Conversation

Ask a common set of core questions while allowing relevant follow-up.

1. What is prompting you to explore a pastoral transition now?

Notes: _____

2. How would you describe your calling to pastoral ministry?

Notes: _____

3. What does faithful preaching and shepherding look like in your current ministry?

Notes: _____

4. Which experiences prepare you to serve our congregation's present needs?

Notes: _____

5. What attracts you to this opportunity, and what concerns do you have?

Notes: _____

Part 3: Preliminary Evidence and Disposition

Supported qualifications: _____

Candidate-reported claims to verify later: _____

Unanswered questions: _____

- ☐ Advance to structured interview
- ☐ Obtain further initial information
- ☐ Retain for appropriate future consideration
- ☐ Decline under documented criteria

Rationale based on approved position requirements: _____

Decision authorized by: _____ Date: _____

Candidate update owner and due date: _____

Do not treat a candidate's statement about his character or achievements as verification. Follow applicable, job-related, lawful criteria; seek qualified advice concerning religious-employer requirements.

Structured Pastoral Interview Guide

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

Purpose: Evaluate pastoral qualifications through consistent questions, careful listening, and evidence. Every interviewer should complete an independent assessment before group discussion.

Candidate ID: _____ Interview date: _____

Round / duration: _____ Facilitator: _____

Interviewers and assigned areas: _____

Before the Interview

- ☐ Confirm the current approved position profile and unresolved questions.
- ☐ Use the same essential questions for candidates at the same stage.
- ☐ Assign the facilitator, question areas, note taker, and timekeeper.
- ☐ Reserve meaningful time for candidate questions.
- ☐ Explain confidentiality and what information may be shared.

1. Biblical Character and Spiritual Maturity

1. How do you cultivate your own spiritual life while caring for others?
2. Describe a time when someone corrected you. What was your response, and what changed?
3. How do you maintain appropriate accountability, integrity, and relationships in ministry?

Evidence and follow-up: _____

2. Doctrine and Biblical Teaching

4. How would you explain the gospel and the nature of the local church?
5. Walk us through how you prepared a recent sermon and interpreted its biblical passage.
6. Which of our church's doctrinal convictions have you studied most carefully, and why?

Evidence and follow-up: _____

3. Pastoral Shepherding and Leadership

7. Describe a pastoral care situation, protecting the identities of those involved, that required patience and wisdom.
8. Tell us about a disagreement with another church leader. What did you do, and what did you learn?
9. Give one concrete example of developing another person for ministry leadership.

Evidence and follow-up: _____

4. Congregational Readiness

10. What opportunities and challenges do you see in our church's current circumstances?
11. What would you prioritize during an initial listening and learning season?

12. What support and governance clarity would you need to serve here faithfully?

Evidence and follow-up: _____

Candidate Questions

What did the candidate ask? _____

What did our team commit to send or clarify? _____

Independent Interviewer Assessment

Specific evidence of biblical and spiritual maturity: _____

Specific evidence of ministry competency: _____

Potential contextual strengths and limits: _____

Questions requiring references or additional evaluation: _____

Interviewer recommendation: Advance / Hold / Gather Information / Decline

Reason: _____

Interviewer signature/date: _____

Interview Method Example (Hypothetical)

Question: 'Tell us about developing another ministry leader.'

Weak evidence: 'I love mentoring people.'

Promising but unverified report: 'I trained two volunteers who now lead groups.'

Corroborated evidence: Candidate provides specific roles, actions, and outcomes, and authorized references independently confirm the account.

Reference Checks, Verification, and Safeguarding

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

Purpose: Corroborate essential information through authorized reference conversations, lawful verification, and appropriate safeguarding procedures.

Candidate ID: _____ Verification coordinator: _____

Start date: _____ Status: _____

Authorization and Scope

- ☐ The candidate received an explanation of the checks planned.
- ☐ Required authorizations and disclosures were obtained.
- ☐ The candidate identified any current-church confidentiality restrictions.
- ☐ No contact with current leadership will occur without explicit permission.
- ☐ We determined what third-party screening rules and adverse-action procedures apply.
- ☐ Required safeguarding and reporting procedures have been reviewed with qualified people.

Reference Plan

Role or relationship	Permitted contact	Date / status
Former supervisor / elder	_____	_____
Ministry colleague	_____	_____
Person supervised	_____	_____
Other appropriate reference	_____	_____

Reference Questions

1. How and how long have you known or worked with this candidate?
2. What have you personally observed of his integrity, humility, and conduct?
3. Tell me about his response to correction or a serious disagreement.
4. What examples demonstrate faithful shepherding and care for people?
5. Whom has he equipped or developed for ministry?
6. What are his most significant strengths and growth areas?
7. Would you willingly serve with or under his leadership again? What informs your answer?
8. Is there a conduct or safeguarding concern requiring appropriate follow-up?

Reference summary and firsthand basis of knowledge:

Information reported but not verified: _____

Follow-up and owner: _____

Verification Checklist

- ☐ Employment and ministry history reviewed
- ☐ Degrees / education confirmed where required
- ☐ Denominational or ordination standing confirmed, if required
- ☐ Required background screening performed lawfully
- ☐ References conducted according to consent and confidentiality commitments
- ☐ Material discrepancies or significant gaps addressed
- ☐ Safeguarding concerns referred appropriately rather than handled informally
- ☐ Final disposition documented by the authorized decision-maker

Material Concern Record (Restricted)

Concern and source: _____

Is this allegation, candidate statement, direct observation, or verified fact? _____

Next appropriate verification or referral: _____

Who is responsible: _____ Due: _____

Disposition and rationale (restricted): _____

IMPORTANT: Allegations are not established facts, but credible concerns must not be dismissed. Prioritize safety and applicable mandatory reporting. Seek independent professional or authority involvement where needed. Do not ask a search team to investigate abuse allegations informally. Third-party background reports may involve special legal notice, authorization, and adverse-action rules. Consult qualified counsel or screening professionals. Where a third-party consumer-reporting agency supplies an employment background report, determine whether the Fair Credit Reporting Act applies, including any separate disclosure, written authorization, pre-adverse-action, and adverse-action notice requirements. Consult qualified counsel rather than treating this worksheet as a legal compliance procedure.

Candidate Comparison and Prayerful Discernment

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

Purpose: Compare evidence consistently while keeping biblical eligibility separate from ministry competency and contextual readiness. Complete independent assessments before group discussion.

Church: _____ Deliberation date: _____

Current position-profile version: _____

Candidates: A _____ B _____ C _____

Step 1: Essential Qualification Gate

Use Meets / Unresolved / Does Not Meet. Do not average essential qualifications with other ratings.

Requirement	A	B	C
Biblical character requirements	—	—	—
Essential doctrinal agreement	—	—	—
Other approved pastoral eligibility	—	—	—
Required verification completed	—	—	—

Unresolved essential questions by candidate: _____

Step 2: Ministry Competency Evidence

Use Evidenced Strength / Adequate Evidence / Development Needed / Unknown. Ratings are prompts for discussion, not a final numerical ranking.

Competency	A	B	C
Preaching and teaching	—	—	—
Shepherding and pastoral care	—	—	—
Discipleship and equipping	—	—	—
Leadership and conflict judgment	—	—	—
Governance and community readiness	—	—	—

For each candidate, cite examples, interviews, sermons, and authorized references supporting the assessment.

Candidate A evidence / unanswered questions: _____

Candidate B evidence / unanswered questions: _____

Candidate C evidence / unanswered questions: _____

Step 3: Deliberation Questions

- ☐ Have we distinguished qualifications from our personal preferences?
- ☐ Have all members assessed the evidence independently first?
- ☐ What is the strongest evidence supporting our preferred candidate?
- ☐ What credible information challenges that preference?
- ☐ Are doctrinal, integrity, or safeguarding concerns truly resolved?
- ☐ Have we followed our agreed decision procedure and church's authority structure?
- ☐ Would we be willing to continue searching if the evidence is insufficient?

Step 4: Recorded Decision

Action selected: Advance / Verify Further / Continue Search / Recommend

Candidate ID (if applicable): _____

Evidence supporting action: _____

Material questions still open: _____

Minority concerns and how addressed: _____

Authorized decision-maker and vote/process: _____

Decision date: _____ Next owner: _____

A persuasive sermon, high interview rating, or personal familiarity cannot erase an unresolved essential qualification. No score should substitute for responsible biblical and pastoral judgment.

Final Candidate Recommendation Packet

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

Purpose: Present a supported, balanced recommendation to the people authorized to act on it. A recommendation is not an employment offer, authorized pastoral call, or candidate acceptance.

Formal Recommendation Letter

To: [Authorized church leadership or body]

From: [Pastor Search Team]

Date: [Date]

Subject: Recommendation of [Candidate] for Senior / Lead Pastor

Dear Church Leaders,

After prayerful consideration and evaluation under our church's approved criteria, the Pastor Search Team recommends that [Candidate Name] advance for consideration as our next Senior / Lead Pastor.

Biblical and doctrinal qualifications: [Summarize evidence and affirm the essential criteria addressed.]

Relevant ministry competencies: [Describe demonstrated preaching, shepherding, teaching, discipleship, and leadership capabilities.]

Congregational readiness: [Explain how the candidate's strengths and growth areas relate to the church's actual needs.]

References and required verification: [Confirm completion status, without publicly distributing restricted reports or personal details.]

Remaining material questions, if any: [Describe matters that must be resolved by the appropriate authorized reviewers before the next step.]

Team deliberation and rationale: [State how the decision was reached under the charter and why the recommendation is warranted.]

We submit this recommendation for action under the church's governing documents. We recognize that only the authorized church body may extend a pastoral call and that the candidate must separately accept it.

Respectfully,

[Team Leader, on behalf of the Pastor Search Team]

Restricted Supporting Document Index

- ☐ Approved position profile
- ☐ Candidate biography and ministry résumé
- ☐ Biblical and doctrinal assessment
- ☐ Preaching and ministry competency assessment
- ☐ Reference and verification completion summary
- ☐ Restricted confidential materials made available only to authorized reviewers

- ☐ Team decision record, including material minority concerns
- ☐ Proposed authorized call terms and compensation
- ☐ Governing-document approval and communication plan

Approval and Call Sequence

1. Team recommendation submitted on: _____
2. Required governing review completed on: _____
3. Congregational or denominational action, if required: _____
4. Formal call authorized by: _____ Date: _____
5. Formal call communicated by: _____ Date: _____
6. Candidate acceptance or declination received: _____ Date: _____
7. Public announcement authorized for: _____

Do not mark 4, 5, or 6 complete merely because the search team recommends the candidate.

Candidate Communication Templates

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

Purpose: Send accurate, timely, dignified messages that reflect actual status. Assign one communication coordinator and adapt wording to your church's process.

1. Application Acknowledgment

Subject: Senior Pastor Application Received | [Church Name]

Dear [Name],

Thank you for your interest in serving as Senior Pastor at [Church Name]. We have received your [complete application / listed materials] and appreciate the time you have invested in sharing your ministry background. Our search team is reviewing applications under the position's approved requirements. We expect to provide an update by [date], or sooner if we need more information.

Thank you for your interest and ministry service.

[Name], Candidate Communication Coordinator

2. Initial Interview Invitation

Subject: Invitation to a Conversation | [Church Name]

Dear [Name],

After reviewing your submitted materials, our team would like to invite you to an initial conversation about the Senior Pastor opening. We hope to learn more about your calling, ministry background, and questions about our congregation.

Proposed date/time and time zone: [Details]

Format and duration: [Details]

Please let us know whether this works for you. This conversation is part of the evaluation process and does not imply a final decision.

[Name], Pastor Search Team

3. Search Status Update

Subject: Update on Our Pastoral Search | [Church Name]

Dear [Name],

I wanted to let you know that our team is continuing its review and has not yet reached a decision about the next stage. We appreciate your patience and recognize that considering a pastoral transition involves serious commitments. Our next planned update is [date]. If your circumstances change, please feel free to contact me.

[Name], Pastor Search Team

4. Reference Permission Request

Subject: Reference Authorization | [Church Name]

Dear [Name],

As part of the next stage, we would like your permission to speak with the following references: [names and relationships]. We also want to understand any confidentiality concerns, particularly involving your current church. We will not contact current church leaders without your explicit authorization. Please review the proposed contacts and required authorization forms before we proceed.

[Name], Pastor Search Team

5. Respectful Decline

Subject: Update on Your Senior Pastor Candidacy | [Church Name]

Dear [Name],

Thank you for your interest in [Church Name] and the time you invested in our process. After consideration under the position's established requirements, our team has decided not to advance your candidacy for this particular opening. We appreciate your service to Christ and His church and wish you well in your continuing ministry.

[Name], Pastor Search Team

6. Finalist Process Invitation

Subject: Next Stage of Our Pastoral Search | [Church Name]

Dear [Name],

Our team would like to invite you to the final stage of consideration for the Senior Pastor position. The proposed next steps are [specific meetings, evaluations, or authorized congregational introduction]. We will agree with you in advance on confidentiality and any public communication. This invitation is not a formal pastoral call, which remains subject to the church's governing approval process and your acceptance.

[Name], Pastor Search Team

7. Candidate Withdrawal Acknowledgment

Subject: Thank You for Letting Us Know | [Church Name]

Dear [Name],

Thank you for informing us that you are withdrawing from consideration for our Senior Pastor opening. We respect your decision and appreciate the conversations and time you shared with us. We will update our search records accordingly and handle your materials under our applicable confidentiality and retention policy. We pray for God's wisdom and grace as you continue in ministry.

[Name], Pastor Search Team

Message Release Checklist

- ☐ The candidate's status has been verified in the tracker.
- ☐ The sender is authorized to communicate this decision.
- ☐ The message accurately states the next step and any date promised.
- ☐ Confidential details about other candidates or references are excluded.
- ☐ Actual send date, sender, and next follow-up are recorded in Appendix E.

Pastoral Transition and First 90 Days Plan

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

Purpose: Prepare the church and incoming pastor for a healthy beginning, then transfer responsibility from the search team to established church leadership. Begin only after the call is properly authorized and accepted.

Church: _____ Incoming pastor: _____

Call accepted: _____ Start date: _____

Transition coordinator: _____

Accountable church leadership contact: _____

Before Arrival

- ☐ Accepted call and written terms confirmed.
- ☐ Compensation, benefits, and start date confirmed by authorized leaders.
- ☐ Governance and reporting relationships reviewed with pastor.
- ☐ Outgoing pastor's ongoing role or departure terms clarified, if applicable.
- ☐ Relevant ministry, financial, personnel, and governing documents prepared.
- ☐ Relocation, housing, and community help offered as welcomed by family.
- ☐ Congregational communication coordinated with pastor and current church.
- ☐ Pastor's spouse and children are not assigned unrequested ministry duties.

Open questions and owner: _____

Days 1–30: Listen and Learn

Suggested activities: Meet church leaders and staff; learn congregational history; review care needs, facilities, finances, and ministries; spend time listening before making nonurgent changes.

What the pastor is learning: _____

Support requested: _____

30-day leadership conversation date: _____

Days 31–60: Assess and Clarify

Suggested activities: Discuss observations, confirm boundaries of authority, identify ministries needing attention, and distinguish urgent issues from matters requiring patience.

Emerging needs and strengths: _____

Decisions and resources needed: _____

60-day leadership conversation date: _____

Days 61–90: Agree on Initial Priorities

Use priorities suited to this congregation, not a fixed numerical growth target.

Priority	Responsible leader(s)	Support / review date
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

90-day conversation date: _____

First-Year Support

Leadership check-in schedule: _____

Primary topics: family adjustment, workload, shepherding needs, trust, collaboration, training, priorities, financial support, and areas of disagreement.

Escalation and accountability process under church governance: _____

Search Team Closeout

- ☐ All candidate communications completed.
- ☐ Documents transferred to the authorized custodian.
- ☐ Candidate records retained or deleted under approved policy.
- ☐ Lessons learned documented without unnecessary sensitive details.
- ☐ Transition responsibilities assigned to authorized church leaders.
- ☐ Search team's assignment formally closed.

What worked well in this search? _____

What should be improved next time? _____

Who owns the pastor's first-year support? _____

Team leader signature/date: _____

Church leadership confirmation/date: _____