

## **APPENDIX B**

### **Call Process Checklist**

**STEP 1: NOTIFY THE DISTRICT PRESIDENT, THE REGIONAL VICE-PRESIDENT, AND THE CIRCUIT VISITOR AS SOON AS A PASTORAL VACANCY OCCURS**

Should be:

- In writing
  - As soon as you become aware of the vacancy
  - From the chairperson of the congregation or Board of Elders
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**STEP 2: MANAGE THE DETAILS OF CLOSING THE PASTORAL-CONGREGATIONAL RELATIONSHIP: EXIT INTERVIEW, FUTURE RELATIONSHIP, FINANCIAL ISSUES, APPROPRIATE FAREWELL**

You should:

- Conduct an exit interview with the pastor
  - Clearly establish the departing pastor's future relationship with your congregation
  - Resolve any financial issues and ensure a smooth transition and generous care for the pastor
  - Plan an appropriate farewell
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**STEP 3: SELECT AN INTENTIONAL INTERIM MINISTER, VACANCY PASTOR OR PULPIT SUPPLY PASTOR, DEFINE YOUR EXPECTATIONS OF HIS WORK AND NEGOTIATE HIS COMPENSATION PACKAGE**

Work with the District President, Circuit Visitor and or Regional Vice-President to:

- Arrange a meeting with your congregation's governing board or council
  - Determine how pastoral services, procedures and compensation will be handled during the vacancy:
    - Intentional Interim Minister (Divine Call)
    - Vacancy Pastor
    - Pulpit Supply Pastor
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**STEP 4: ESTABLISH A CONGREGATIONAL CALLING PROCESS (UNLESS THE PROCESS IS ALREADY SPECIFIED IN YOUR CONSTITUTION) AND A CALL COMMITTEE**

- Determine if your constitution includes a prescribed calling process and, if so, follow it.
  - If no calling process is prescribed, determine whether a special call committee, the Board of Elders or church council will serve as the call committee.
  - Assemble your call committee, taking care to provide broad representation from the congregation but limiting to no more than 9 or 10 people.
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**STEP 5: COMPLETE A SELF-STUDY OF YOUR CONGREGATION'S LIFE, MINISTRY & MISSION, AND A PASTORAL PROFILE**

- Resist the temptation to rush in calling a new pastor and take the time to do a thorough self-study

- Ensure your study includes:
    - Your Context – Analyze your neighborhood, community and demographics. Use LCEF’s MissionInSite for powerful tools to gather this information.
    - Your Congregation – Through surveys, focus groups, interviews and whatever other means you can determine, gather feedback from your members, staff and community about your strengths, challenges, opportunities and needed attributes of the next pastor. Ensure your congregation is heard!
    - Pastoral Profile – As you collect congregational feedback on the attributes needed in your next pastor, determine the themes that arise that describe the type of pastor your congregation needs, and that will guide the nomination process and aid the District in finding appropriate candidates.
  - At a minimum, complete the “Self-Study Tool for Congregations”, [Appendix E](#).
  - Consider the special circumstances related to an assistant or associate pastor who wants to be considered for a lead/senior pastor role. See [Appendix G](#).
  - Consult your Circuit Visitor for advice and assistance with your congregational self-study.
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## ☐ STEP 6: RECEIVE CONGREGATIONAL NOMINATIONS FOR THE OFFICE OF PASTOR

- See [Appendix H](#) for a nominations form sample.
  - Instruct the congregation to only submit nominees that are in good standing on the Clergy Roster of the LCMS, and that fit your Congregational and Pastoral Profile.
  - Normally only communicant members may submit nominations – refer to your constitution.
  - Establish a deadline for the congregation to submit nominations – a two-week period is recommended.
  - Provide a letter to nominators acknowledging receipt of nominees after the nomination period ends.
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## ☐ STEP 7: FORWARD ALL NOMINEE NAMES RECEIVED TO THE DISTRICT PRESIDENT'S OFFICE

- Once your nominating period ends, send the list of nominees to the District President’s office as soon as possible.
  - The District President will perform a search to add additional qualified candidates to the call list, evaluate nominees and compile comprehensive information on them to provide to the call committee for evaluation.
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## ☐ STEP 8: RECEIVE YOUR CALL PACKET FROM THE DISTRICT

- The process for the District to compile a call list for your consideration takes 4-6 weeks.
- The comprehensive candidate information compiled by the District will be delivered to the call committee by the Circuit Visitor. This information is confidential and for the committee’s use ONLY, and is to be duplicated (except for the call committee) or distributed electronically. Once the call process is completed, the PIF and SET forms that comprise this information are to be destroyed.
- If a name is not included on the call list, it is **only** because the District President feels there are good and sufficient reasons. He will be happy to communicate such matters to the call committee.
- It is not acceptable to place Pulpit Supply, Vacancy or Intentional Interim Ministers on the call list.

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## ☐ STEP 9: PRAYERFULLY EVALUATE CANDIDATES AND KEEP YOUR CONGREGATION INFORMED

- Request the congregation pray for the call committee as they begin evaluating candidates.
- Conduct evaluation as follows:
  - Complete an initial evaluation based on the information provided, and determine which candidates you would like to consider.
  - Send a letter and some brief information on your congregation to the list of candidates you selected from the initial evaluation, asking for their availability and willingness to engage with you in the call process. Emailing this information in addition to the printed matter is also acceptable.
  - For those wanting to engage, send detailed information including the report from your self-study, congregational history, vision/mission/values, governance board description, community information, etc.
  - Schedule phone/video interviews. Debrief as soon as possible after the interviews.
  - Determine your “short list” of candidates to bring to your church for in-person interviews.
  - Schedule these visits to include meeting opportunities with leadership and church/school staff, community tours, and congregational meet-and-greet and Q&A forums.
  - After the visits, convene your call committee and discuss which candidate(s) to recommend to the congregation for vote.
- In all of these matters, earnestly strive to be led by the Holy Spirit. Calls are always extended in the context of prayer for God’s guidance.

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## ☐ STEP 10: ESTABLISHMENT OF COMPENSATION AND CALL DOCUMENT PREPARATION

- The appropriate board or committee should establish the compensation package prior to the call meeting, laying out the basic parameters of compensation. Individual adjustments may need to be made based on the situation.
- Elements of the compensation package include salary, vacation, benefits, etc., and should be influenced by education, experience, special skills and expectations, ministry role, etc.
- See [www.psd-lcms.org](http://www.psd-lcms.org) for salary guidelines.
- Call documents should be completed prior to the call meeting (other than the called pastor’s information), and reviewed by the Circuit Visitor.

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## ☐ STEP 11: ESTABLISH THE DATE AND PROCEDURE FOR THE CALL MEETING

- Establish a date for the call meeting and publish to the congregation, along with recommended names and their biographical information.
- Follow any procedures outlined in your constitution related to the candidates to bring before the voters or the communication and conduct of the Call Meeting.
- The Call Meeting is very meaningful in the context of worship as a Call Service. See [Appendix L](#) for a sample format.
- Use written ballots. Voting by proxy is strongly discouraged, and absentee ballots should not be permitted.
- Balloting is complete when one candidate has a majority. Multiple ballots may be needed to arrive at a majority.

- At the conclusion of balloting, it is recommended that a resolution be requested to make the selection unanimous. This is a sign of unity and commitment to a common cause, and for the called pastor to know the congregation is united in calling him.
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**☐ STEP 12: IMMEDIATELY NOTIFY THE PASTOR-ELECT OF HIS SELECTION AND SEND THE PROPER CALL DOCUMENTS**

- Notify the pastor-elect immediately of his election by phone while the meeting is still in session (usually done by the congregational president or Circuit Visitor).
  - Invite the pastor-elect and family for a post-call visit, and be prepared to do all within your power to assist him in his decision. Your District is here to do the same.
  - Call documents should be immediately sent to the pastor-elect, with a copy to the District office.
  - Notify the individual(s) who were under consideration but not called thanking them for their patience, openness and willingness to participate.
  - Be open and prepared to engage in discussions and negotiations with the pastor-elect.
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**☐ STEP 13: NOTIFY THE DISTRICT PRESIDENT THAT THE CALL HAS BEEN SENT**

- Phone or email the news to the District President's office.
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**☐ STEP 14: THE CALL IS ACCEPTED OR DECLINED**

- If the call is accepted, plan for the pastor's arrival, installation and ongoing mutual ministry.
    - Work with the pastor to plan the Installation Service.
    - Be flexible and supportive as you begin and through the transition. Building a good relationship is critical.
  - If the call is declined, consult with the Circuit Visitor and District President to form a recommendation about continuing with the current list of candidates or pausing the process to add names to the list. You may wish to ask the declining pastor the reasons he declined.
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**☐ STEP 15: EXPRESS THANKS AND APPRECIATION**

- Remember to plan some way to express thanks and appreciation to the Circuit Visitor and/or the Regional Vice-President for his ministry in your midst during the time of your pastoral vacancy.