

TRANSITIONAL DOCUMENT REVIEW

Report Form

This Report completed by: _____

Area: _____

Congregation: _____

Date: _____

For Synod Records:

1.	How many people serve on your Congregational Council? _____	
2.	How many Congregational Council members are present at this meeting? _____	
3.	Has your congregation and/or Congregational Council signed the Covenant Concerning the Life and Ministry of the Eastern Synod, ELCIC?	() yes () no
4.	If not, why? _____	

Pastoral Records: Are the following records up-to-date?

- 1. Records of membership, baptisms, confirmations, marriages, births, funerals, transfers, and communions; () yes () no
- 2. Parochial Reports () yes () no
- 3. Congregational Annual Reports and Council minutes; () yes () no
- 4. Prospective members list; () yes () no
- 5. Sick and shut-in's list, and other pastoral situations needing special attention; and () yes () no
- 6. Congregational mailing/address list. () yes () no
- 7. Are your records stored electronically? () yes () no
- 8. If yes, who is able to access them? _____
- 9. Who has access/passwords for church e-mail? _____
- 10. Who has access/passwords for website, social media, etc.? _____

By the time the Assistant to the Bishop meets with the Call Committee, to identify a list of perspective candidates, all of these documents should be up-to-date.

Financial Records:

1. Where is the title for the church property? _____
2. Where are your governing documents ie. Constitution, bylaws, etc.? _____
3. Are the records of the church treasurer and the financial secretary up-to-date? () yes () no
4. Has the church filed its registered charity information return (T3010) with CRA? () yes () no
5. Who is responsible to file with CRA? _____
6. Were your most recent annual financial statements audited or reviewed? () yes () no
7. Does the church have investments? () yes () no
8. What financial institution holds the investments and where is the documentation stored?

9. Who has responsibility for oversight of the investments? _____
10. Where is the church insurance policy? _____
11. Who sees that it is current? _____
12. Do you retain your Congregational Council minutes and Congregational Meeting minutes in perpetuity?
13. Who has keys to the church? _____
14. Is there a safe? () yes () no
15. If so, who has the combination? _____

(pastor)

(Council Chairperson)

(Dean of the Ministry Area)

The Dean of the Ministry Area is asked to forward this report form to the

Eastern Synod of the Evangelical Lutheran Church in Canada

74 Weber Street West

Kitchener, Ontario N2H 3Z3