



APPENDIX A

LEGACY AND CHURCH COMPLETION CHECKLIST

With appreciation for material from:

- **LEAVING A LEGACY OF MISSION AND MINISTRY**, a resource for the closing of a congregation, Evangelical Lutheran Church of America
- **CHURCH CLOSURE RESOURCES**, Living Waters Association, UCC Heartland Conference
- **MINISTRY COMPLETION & LEGACY PROCESS**, Building a Legacy and Completing a Ministry webpage, UCC Southern New England Conference

GETTING STARTED

- ☐ **START YOUR CONVERSATIONS EARLY** as you consider church completion and legacy building. Ministry completion and legacy planning take time, leadership, energy, and money. Do not wait until there are just a handful of folks left with little energy or capacity to do so. *See Chapter 2, Is It Time?*
- ☐ **GATHER AND STUDY NECESSARY DOCUMENTS** including your church constitution & bylaws, mortgages, loans or liens on property and information on any burial options that your congregation provides (cemetery, columbaria, memorial gardens).
- ☐ **ENFOLD YOUR CONVERSATIONS** and process in prayer and spiritual reflection. *See Appendix C, Bible Studies, and the Worship Section in Appendix B, Resources and Bibliography.*
- ☐ **LISTEN TO ALL VOICES.** Prepare for grief and anger. Steer clear of blame and guilt. Remember the loudest voices are often not speaking for everyone.
- ☐ **SCHEDULE A CONSULTATION** between the congregation and judicatory leaders (conference or association) to develop a written plan for the dissolution process.
- ☐ **SEEK LEGAL COUNSEL**, a lawyer with experience and knowledge of local and state laws concerning church corporation dissolution, real estate transactions, and burial regulations. *See Chapter 7, Legal Issues.*
- ☐ **CONSIDER ANY ADDITIONAL MATTERS** related to special circumstances in the dissolution of your congregation; a multi-point parish, ecumenical partnership, shared ecumenical property, and community stakeholders.
- ☐ **AFTER MAKING DECISION** to move ahead with church completion and legacy building designate a leadership group to plan the process.

MEMBERSHIP AND LEADERSHIP CARE

- ☐ **COMMUNICATE DISCUSSIONS AND DECISIONS** with all members and participants in transparent and timely ways. Members will process these conversations in differing ways and times.
- ☐ **PASTORS AND LEADERS** often experience stress due to grief and failed expectations. Respectful and supportive relationships can deter the formation of stress.
- ☐ **BE SURE TO CLARIFY LEADERSHIP ROLES.** Congregational leaders are responsible for the process and decisions. It is the pastor's role to encourage conversation and process. *See Chapter 4, The Role of the Pastor.*
- ☐ **CONSIDER PROVIDING** a severance package to clergy and church staff. Consult with legal council on doing so before church completion.
- ☐ **PROVIDE PASTORAL CARE** to members for the transfer of their membership to other congregations. Members may choose another congregation to join or let members choose their own congregations. *See Chapter 3, Legacy Inherited, Legacy Futured.*
- ☐ **SEEK A PASTOR OR CONGREGATION** that can provide future pastoral care for older and homebound members who may not be able to participate in another congregation.

CHURCH RECORDS, HISTORIC MATERIAL AND ARCHIVES

- ☐ **COLLECT AND ORGANIZE** your church records and archival materials. Check out recommendations on sorting, organizing and donating records. *See Chapter 3, Legacy Inherited, Legacy Futured, and the archive section of Appendix B, Resources and Bibliography.*
- ☐ **CONSIDER AND CONTACT OPTIONS** for distributing church archival materials: UCC Related Archives, and/or Local Historical Society, Seminary, College or Public Library.
- ☐ **CHECK THE THE GUIDELINES** for material donation at the archives. Be sure that you have worked with them to sign and save any documents related to gift agreements, copyright, and donations. Each institution has its own rules and procedures.
- ☐ **CONSIDER MAKING** a financial operational support or restricted fund to an archives to ensure that current and future generations may access your church's records for family history, community commemorations, and historical research.
- ☐ **INVITE AND RECOGNIZE** the archival center receiving of your church historic materials in a worship service.
- ☐ **INFORM THE CONFERENCE/ASSOCIATION** as to where your archives and vital records have been deposited.

LEGACY PLANNING AND CONVERSATIONS

- ☐ **START YOUR CONVERSATIONS EARLY.** Don't wait until the end of the closure process. Discuss your church's core values and ministries. Look at the whole history of your

church's mission priorities through the years including its founding. *See Chapter 3, Legacy Inherited, Legacy Futured.*

- ☐ **REVIEW YOUR CHURCH'S CONSTITUTION** and by-laws to see what is required to process legacy decisions as well as how church property and assets can be distributed.
- ☐ **CONTACT YOUR CONFERENCE**, national ministries and other organizations that can support and advise your financial and property decision-making. *See the section on organizations that support congregations in Appendix B, Resources and Bibliography.*
- ☐ **SPEAK WITH COMMUNITY** and missional allies to consider the impact your building and financial legacy could make.
- ☐ **A HELPFUL WAY** for a congregation to clarify its legacy is to write and approve a legacy Statement or Covenant.

FINANCIAL ASSETS LEGACY

- ☐ **DETERMINE WHAT WILL BE DONE** with the assets of the congregation (including the building or proceeds from its sale) after payment of debts and liabilities: *Upon dissolution, any remaining assets of the congregation can only be transferred to 501(c)(3) religious, educational, or charitable organizations, or governmental entities. The assets cannot be given to individuals or non-charitable organizations. See Chapter 7, Legal Issues and Chapter 6, Financial Legacy.*
- ☐ **IN DETERMINING DISPOSITION** of congregation's finances, take note of any restricted gifts or assets. Some financial assets may need to be repurposed. Consultation with legal counsel as well donors may be necessary.
- ☐ **CONSIDER HOW TO CREATE** your church's financial legacy for a long-term mission life. A church's financial legacy should last as long as it took to create and build the legacy asset.
- ☐ **WHERE WILL YOUR LEGACY** make the greatest financial impact?
- ☐ **CONSIDER BOTH** wider church and national/global contributions as well as community missions.
- ☐ **INVITE RECIPIENTS** of your financial legacy to be recognized in a service of worship.

PROPERTY AND BUILDING LEGACY

- ☐ **CONSIDER WHAT LEGACY** you can create with your church property? How does what you do with your property impact your community? How does what you do with your property reflect your congregation's priorities for community concerns, housing, education, justice, and new or other churches?
- ☐ **SPEAK WITH YOUR WIDER CHURCH**, community and non-profit allies as to what impact your property could make for future missional use.

☐ **DETERMINE THE FUTURE** of your building(s): There are several possibilities that a church may consider. *See Chapter 5, Not a Building (But Church Building Matters).*

☐ **DETERMINE YOUR CHOICE:** Will the building be sold, transferred or repurposed?

- **ENSURE THAT THE BUILDING** and insurance coverage (fire, windstorm, theft, vandalism) will be maintained until disposition of the property, and identify who will maintain it.
- **IF SELLING**, who is responsible for selling it?
- **IF THE BUILDING** is to be destroyed or moved, identify a specific date by which the building will be destroyed or moved, and identify who will pay for doing it.
- **WHAT WILL BE DONE** with the building's furnishings and other congregation personal property? Disposition of all church property, including equipment, worship and office material, and furniture should be established by church leadership.

CEMETERIES, COLUMBARIA, MEMORIAL GARDENS LEGACY

☐ **IF THE CHURCH OWNS** a cemetery, provide for the care and upkeep of the cemetery, including determination of clear title of land involved, completion of any corporate details, selection of directors, and disposition of any excess land. *See Chapter 2, Is It Time? and the cemetery section in Appendix B, Resources and Bibliography.*

☐ **COMMUNICATE DIRECTLY** with all families and stakeholders of your cemetery, columbaria, and/or memorial gardens.

COMPLETION SERVICE AND/OR SEASON

☐ **PLAN SPECIAL SERVICE** or season of celebration and thanksgiving for the years of ministry of the congregation. Invite the wider church, neighboring congregations, mission partners and legacy recipients to participate.

☐ **CHECK OUT WORSHIP SERVICES.** Ask judicatories or national ministries for worship resources. *See the worship section in Appendix B, Resources and Bibliography.*

☐ **IF ENDING AN AUTHORIZED MINISTRY** is part of the church completion, include the liturgy for *Ending an Authorized Ministry in the Book of Worship, United Church of Christ, p. 252.*

CONGREGATIONAL MEETING

☐ **CONSULT WITH LEGAL COUNSEL** to ensure that the proper steps are followed and that the resolution of dissolution contains the necessary requirements in accordance with state law and the congregation's constitution. *See Chapter 7, Legal Issues.*

☐ **CONVENE A MEETING** of the congregation, properly called according to the requirements of the congregation's constitution and of the state corporation statute, for the purpose of dissolving the congregation.

☐ **ADOPT A RESOLUTION** to dissolve, which shall be approved by the required majority of voting members present at the meeting of the congregation called for that purpose. Make sure that a quorum is present under the congregation's constitution. And Consult state law as to what should be included in the resolution and the appropriate vote required to dissolve, e.g., simple majority, two-thirds, etc.

☐ **TAKE CLEAR MINUTES** of the meeting.

FOLLOWING THE MEETING

☐ **MAKE SURE TO HAVE** a small authorized group in place, who:

- **CAN MAKE DECISIONS** following the filing of necessary documents for questions or concerns that might arise from government agencies, or
- **ADDRESS ANY ONGOING CONCERNS** about the property sale or the settlement of legacy assets during the dissolution or following closure. *See Chapter 7, Legal Issues.*

☐ **CARRY OUT PROMPTLY**, before dissolution of the congregation, the payment of all debts and liabilities of the congregation. **Note:** this includes addressing any outstanding service contracts or leases.

☐ **CARRY OUT PROMPTLY** before dissolution of the congregation:

- **TRANSFER OF TITLE** to real estate to the appropriate successor in title
- **TRANSFER OF FURNISHINGS** and other personal property of the congregation
- **TRANSFER OR CLOSURE** (as appropriate) of all bank accounts, trusts, endowments, or other assets to the appropriate recipients.

☐ **CHANGE MAILING ADDRESS** and give neighbors and police information on a contact name if building is still owned but not occupied. Check out Insurance Board brochure on securing a closed building. *See the books section in Appendix B, Resources and Bibliography.*

☐ **UPON COMPLETION** of the above tasks, file the necessary documents with government authorities to dissolve the corporate status of the congregation.

☐ **FORMALLY NOTIFY** the Conference/Association that all these steps have been properly completed and provide documentation of such.

☐ **THE ASSOCIATION OFFICE** officially notifies the national offices of the United Church of Christ.