

Best Practices for Worker Transitions

This is a working document designed to outline suggested best practices in cross-cultural worker transitions. It details the responsibilities of the sending church, agency, and worker in various transition situations.

Summary Guidelines and Values	page 2
Policy Development	page 3
Pre-Return Action Steps (regardless of reason for return)	page 4
Return for Retirement	page 6
Return for Discipline/Restoration	page 7
Return for Physical/Mental Health Crisis or Other Traumatic Crisis	page 9
Return for Job Change or Relocation with Same Agency	page 10
Return for Agency Change	page 11
Return for Change of Career	page 12

Note: Prayer is not listed as a separate action step in this document, but it is essential that each step be covered by prayer.

These guidelines were developed by

- **John Bernard**, executive director, [United World Mission](#)
- **Dave Hall**, missions pastor, [Emmanuel Faith Community Church](#), Escondido, CA
- **Ellen Livingood**, president, [Catalyst Services](#)
- **Kelly McClelland**, certified career coach, [Transition Time Coach](#)

Best Practice Guidelines for Worker Transitions

Summary Guidelines & Values

Foundational to the best practices presented in this document is a relatively simple set of values and guidelines that should inform sending churches, agencies, and workers prior to and during transitions.

1. **Church responsibility.** Local churches have primary spiritual and familial responsibility for the cross-cultural workers they send. Churches partner with agencies to deploy workers but are committed to their own continued role and responsibilities.
2. **Agency collaboration.** Agencies serve the church in providing leadership, administrative services, and member care to workers. Agencies do not replace the local church in its primary sending role, but are committed to collaborate and communicate appropriately.
3. **Dual accountability.** Workers have a direct reporting relationship to their agency leadership, but an ultimate accountability to their sending church. Workers must honor both relationships with integrity and communicate appropriately with both.
4. **Mutual respect.** Transitions require communication and collaboration among workers, agencies, and sending churches. Each party must honor the appropriate roles of the others, recognizing that this maintains unity in the body of Christ and the trust required for doing mission together.
5. **Worker initiative.** Workers are responsible to initiate discussion regarding transitions with their agency leadership and their sending-church leadership in an order appropriate to the situation.
6. **Inclusion of sending church.** Agencies will not initiate or approve major transitions in a worker's ministry without ensuring that sending-church leadership is included in a timely and appropriate way.
7. **Inclusion of agency.** Sending churches will consult with agency leadership if a transition is initiated by the worker without the agency's knowledge, in a timeframe appropriate to the situation.
8. **Transfer of sending responsibilities.** Some or all of the sending-church functions may, especially over time, transition or need to transition from the initial sending church to a different local congregation. The worker, church leaders, and agency leaders will need to clarify the role and responsibility of any local church taking some leadership role in a transition.
9. **Inclusion of other voices.** In situations where an on-field partner (church or other national entity) may be significantly impacted by a transition, they should be invited into discussions of related decisions.
10. **Building of church capacity.** If the sending church does have the vision or skills for their role/responsibilities in transitions, the worker and agency should make an effort to help them expand their capacity before assuming that the church's involvement will be limited.
11. **Commitment to Kingdom-driven, healthy transitions.** Lifetime missionary assignment is never guaranteed. If the highest benefit for Kingdom ministry requires a difficult transition for a worker and/or their family, the agency and sending church must make an effort to assist the worker to transition to a place and in a way that maximizes God's best for the worker and family.

Best Practice Guidelines for Worker Transitions

Throughout this document, if text is dropped down from the top of the box, it indicates a difference in order—an action which begins later and/or in response to the action steps by other parties which appear higher in their boxes in that particular column.

POLICY DEVELOPMENT				
#	Task/Concern	Sending Church	Agency	Worker
	<p>Establish written transition policies including for:</p> <ul style="list-style-type: none"> • Home assignment • Retirement • Emergency returns • Discipline situations • Assignment or location changes • Agency changes 	<p>Establishes objective transition policies well before any situations arise with an individual worker. Documents should clearly outline what transition decisions the church wants to be <u>involved</u> in and what situations they only need to be <u>informed</u> about. Clarifies confidentiality protocols, especially in discipline situations. Includes guidelines for how other stakeholders will be informed.</p> <p>Takes responsibility to stay abreast of related policies of agencies of all workers for whom they serve as the sending church.</p> <p>Considers including a requirement that workers develop a Barnabas/ Advocate (B/A) Team. This team can walk alongside workers throughout ministry but are particularly key in handling logistics during transitions and being sensitive to needs and issues.</p>	<p>Establishes and publishes clear policies that apply to all member transitions. Policies should cover timeframes, accountability, and finances. New appointees and their sending churches should be informed about these policies. Clarifies confidentiality protocols, stipulating that all pertinent information will be shared with sending church.</p> <p>Communicates major policy changes to workers and sending churches as soon as adopted. Resends these guidelines to both workers and their sending churches when agency becomes aware of a pending transition. In the case of retirement, policies should be recirculated 5 years in advance and again 1 year prior to the worker's anticipated retirement.</p> <p>Produces a FAQ sheet for churches addressing common questions. Invites questions and interaction.</p>	<p>Tries to stay informed of transition policies of their agency, and of their sending and supporting churches.</p>
	<p>Emergency returns policies should cover:</p> <ul style="list-style-type: none"> • serious accidents • physical or mental illnesses • death of immediate family member (on field or at home) • natural disasters • violence to individual or larger political trauma • any other personal or family crisis 	<p>Establish clear crisis-management protocols including guidelines for how information will be disseminated to family members, the congregation, the media, and other stakeholders.</p> <p>Communicates these policies to all workers from beginning of relationship. Any exceptions should be agreed to in writing by worker, church, and agency prior to beginning of service. Review protocols regularly internally and with workers.</p> <p>Knows the policies and insurance coverages provided by agency. If deemed inadequate, purchases coverage and/or establishes an emergency fund for such crises.</p>	<p>Establishes clear crisis management protocols including clarification regarding funding available to cover unusual expenses associated with crisis situations.</p> <p>Communicates these policies clearly to all workers and their sending churches from beginning of relationship. Recirculates every 2-3 years.</p>	<p>Takes responsibility to know crisis-management policies of both sending church and agency.</p> <p>If worker's field also has additional crisis-management policies, these should be shared with sending church.</p> <p>If possible, build an emergency fund to cover crisis-related, unplanned expenses.</p>

A. PRE-RETURN ACTION STEPS (regardless of reason for return)

#	Task/Concern	Sending Church	Agency	Worker
A-1	Clarify reason for return and anticipated length of stay, where applicable	If informed by the worker or the agency that a transition is being made or considered, but no three-way discussion is requested, the church should initiate that conversation.	<p>Reminds the worker that their sending church should be involved from the beginning in a transparent discussion of transition issues.</p> <p>Immediately after the worker contacts the church, the agency follows up with a letter or phone call confirming the desire for a three-way dialog.</p> <p>If worker is reluctant to bring the church into the dialog or the church is unresponsive, the agency pursues 3-way communication, as possible.</p>	Unless this is a routine home assignment, the worker initiates a conversation with their agency and their sending church very early in the process of considering a transition. Initial information may be communicated verbally or in writing. Follows this first contact with a request for a 3-way dialog that includes worker, agency, and church. Involves other important stakeholders as appropriate. Discusses purpose, timing, finances, and other implications.
A-2	Clarify expectations for transition time	Initiates discussion if worker or agency does not do so, especially if there are concerns.	Initiates additional conversation with sending church if there are concerns. Responds to such concerns by initiating 3-way discussion.	Works with agency to clarify expectations and accountability for the transition time. Communicates these to sending church in writing, copied to agency. Asks sending church for any additional expectations. If there are significant requirements to be fulfilled, this letter details a reporting schedule.
A-3	Determine financial arrangements of transition time	Initiates discussion with worker and also with the agency if there is insufficient information provided and/or there are concerns.	<p>Makes sure that sending church is fully aware of agency financial policies applicable in this situation. Responds to any sending-church concerns by initiating 3-way discussion.</p> <p>Makes sure that the worker has communicated clearly with all stakeholders. Follows up with a letter of their own to confirm financial arrangements and deadlines.</p>	<p>Communicates with sending church about finances, copied to agency.</p> <p>After it is confirmed that worker, agency, and sending church agree on timeframe and finances, then worker and agency coordinate communication to all donors and other stakeholders. While verbal communication is helpful, a letter should be sent explaining the transition and clarifying financial arrangements, especially if donations will no longer be accepted after a certain date.</p>
A-4	Determine housing	Initiates discussion with worker. Task may be delegated to the Barnabas/Advocate (B/A) team. Church clarifies how much it can do and finance.	Advises worker as needed, especially if sending church does not engage.	Uses personal network and church resources to find solutions. Keeps sending church and agency informed of situation.

#	Task/Concern	Sending Church	Agency	Worker
A-5	Determine other needs such as car, short-term employment, schooling for children	Same as A-4		Same as A-4
A-6	Determine counseling needed (type, potential duration, source, funding)	Initiates discussion if they identify need and the worker and/or agency have not raised the issue. Openly discuss how cost will be funded. Some or all may need to be borne by church.	In response to the worker's request or by their own initiation, begins a 3-way conversation of these needs and clarifies financial aspects.	Feels freedom without any stigma attached to inform agency and sending church of their need for counseling . Asks for referrals to appropriate providers, as needed. Clarifies how costs will be covered.
A-7	Determine what will be announced to congregation	Initiates discussion with worker , then follows through with appropriate dissemination of information to church body.		Agrees to wording and timing of announcement. This generally occurs after informing donors.
A-8	Role of Barnabas/ Advocate team	Missions pastor/team helps the worker's B/A team know and fulfill their role throughout transition process. Continues to monitor the effectiveness of the B/A team and celebrate the team's service when they are finished.		Discusses with the B/A or missions team other types of help needed personally or by family . In situations of extended or permanent stay, works the B/A team to clarify when their role will end.

B. RETURN FOR RETIREMENT

See guidelines under first section in document, "Pre-Return Action Steps for All Transitions."

#	Task/Concern	Sending Church	Agency	Worker
B-1	Clarification of retirement timing, location, and financial needs	<p>Five-ten years prior to normal retirement age for each worker, initiates discussion and requests worker meets with financial planner. Underwrites cost for this counsel, if necessary.</p> <p>Continues to follow up with worker as retirement age nears.</p> <p>Makes sure that worker has communicated clearly with all stakeholders.</p>	<p>Reminds workers well in advance of agency policies related to retirement.</p> <p>If sending church doesn't provide a financial-planning advisor, recommends one to workers well in advance of their anticipated retirement date.</p> <p>Makes sure that worker has communicated clearly with all stakeholders.</p>	<p>Begins to research retirement options and clarify financial issues 5-10 years prior to anticipated retirement date.</p> <p>If worker plans to delay retirement past the typical retirement age in their sending country, seeks approval of their agency and sending church, then clarifies to all donors.</p> <p>If sending church does not initiate a conversation, the worker does.</p> <p>At least 2 years prior to anticipated retirement, initiates in-depth conversations with agency and all supporting churches, and, as appropriate individual donors.</p>
B-2	Determine if there will be ongoing service opportunities	<p>If initiated by worker, discusses potential ongoing service opportunities. Related financial implications are clarified among worker, agency, and church. Makes sure that all stakeholders are informed.</p>	<p>If requested by worker, clarifies possibility of any ongoing service with agency and the financial implications. Discusses these options with sending church to gain approval.</p> <p>Collaborates with retiring workers to communicate decisions to all donors.</p>	<p>If worker wants to continue some type of service, initiates conversation with appropriate leaders. Makes sure that all donors are aware of the ongoing service plans and the financial implications.</p>

C. RETURN FOR DISCIPLINE / RESTORATION

See guidelines under first section in document, "Pre-Return Action Steps for All Transitions."

#	Task/Concern	Sending Church	Agency	Worker
C-1	Open discussion of issues	If church is first aware of the issue, establishes a deadline by which the worker will inform their agency of the situation with the understanding that the church will follow up with the agency shortly after that date, regardless of whether or not the worker has made any contact. Depending on the severity of the situation, this deadline may be mere hours.	If the agency is first aware of the issue, establishes a deadline by which the worker will inform the sending church of the situation with the understanding that the agency will follow up with the church shortly after that date, regardless of whether or not the worker has communicated with their church. Depending on the severity of the situation, this deadline may be mere hours. Initiates a discussion of confidentiality issues with the sending church.	Follows up within specified time to communicate the concerns with agency and sending church.
C-2	Agreement or review of confidentiality issues	If agency does not initiate conversation, church does.	Agency initiates 3-way clarification.	Is reminded and reaffirms that there will be full disclosure between agency and sending church.
C-3	Information to additional church leaders and to other supporters of the worker	In situations where there is a need to inform elders or other internal leaders, the church missions leader and pastor discuss with worker the information to be shared , eliciting worker's approval, if at all possible. Confidentiality issues clarified with all involved.	Makes sure that worker and church are in communication about these issues. Informs church of their commitment to work together wherever it is beneficial to the process.	Works with sending church to communicate issue to those who need to be involved in the church's discipline process.
C-4	Information to other supporters of the worker	If the agency does not take the lead in this dialog, the church initiates.	If other supporters need to be informed, the agency takes the lead in a dialog with the worker and the sending church as to what will be communicated and how. If possible, all three sign off on the written communication.	Works with agency and church on these communications.
C-5	Financial arrangements	Church clarifies with worker and agency their financial involvement and timeframe for such.	Agency clarifies with worker and church their applicable financial policies.	Makes sure they and their stakeholders understand financial arrangements.
C-6	Assessment of counseling needs of worker and family	Church initiates 3-way discussion if agency fails to.	Agency initiates 3-way discussion of counseling needs. Special attention is given to addressing the needs of other family members.	Agrees to counseling as deemed necessary by agency and church.

#	Task/Concern	Sending Church	Agency	Worker
C-7	Clarification of updates to congregation	Church initiates an open discussion with worker as to what will be communicated to the general congregation and/or smaller groups with whom the worker is interfacing. Church follows up to make sure that the situation is as comfortable for worker as possible.		Keeps agency advised of communication policy initiated by the sending church.
C-8	Establishing regular progress reviews	If agency does not initiate this dialog, church does.	Agency initiates a 3-way discussion to come to agreement on when/how the restoration process will be evaluated, who will be involved, and what the criteria will be.	Understands and accepts the requirements of agency and church for transparency during this process. Willingly sacrifices privacy for the sake of the restoration process.
C-9	Process to determine if worker is ready to return to ministry.	Signs off on this process if/when they are comfortable. Initiates dialog if agency does not. Has veto power if not comfortable that worker is ready to return to assignment.	If worker requests to be considered for reassignment to the field, agency initiates a worker/church/agency discussion to clarify criteria for return. When stipulations are finalized, the agency makes sure that a written document is circulated to worker and sending church. Takes the lead in considering when/whether conditions and requirements have been met. Before a return is approved, agency and sending church must be fully in agreement that the worker is ready.	If so chooses, initiates discussion about possible return to the field. Understands criteria and agrees to abide by this process. Agrees to abide by the decision of agency and sending church.

D. RETURN FOR PHYSICAL/MENTAL HEALTH CRISIS OR OTHER TRAUMATIC CRISIS

See guidelines under first section in document, "Pre-Return Action Steps for All Transitions."

#	Task/Concern	Sending Church	Agency	Worker
D-1	Financial provision for emergency evacuations	Makes sure that they understand the agency's policies regarding emergency evacuation and their provision for underwriting such costs. If the church deems agency's plan inadequate, takes steps to either procure insurance or determine how these often-considerable costs could be covered under very short notice.	At time of appointment, clarifies for workers and sending churches their policies and potential for underwriting emergency evacuations.	Understands agency financial policies for emergency evacuation and makes sure that sending church is aware of them as well as the potential costs should such be needed.
D-2	Financial provision for on-field, emergency assistance	Establishes an emergency fund for sending appropriate person to field to assist with crisis and workers' transfer home. Determines in advance who would be best equipped for such a role. Provide additional training as needed.	Establishes a crisis care team that is ready to deploy immediately in case of major field crisis. (This is in addition to a crisis management team that would be mobilized in the case of a kidnapping or other international crisis.)	Understands resources that are available prior to crisis and plans accordingly.
D-3	Financial provision for sudden returns that are not emergency evacuations	Consults with worker/agency to determine if funds are available in their account. If necessary, taps contingency funds in the church's missions budget.	If needed, advocates with the worker's sending church to come up with funds for crisis-related return.	Works with agency and sending church to determine how a sudden return will be funded.
D-4	Financial provision for crisis housing, counseling, etc.	As needed, taps contingency funds to cover these unanticipated expenses.	Clarifies agency funds available for crisis counseling.	
D-5	Evaluation of worker, family, and situation	If agency fails to take lead or to provide these professional assessments, the church initiates it.	Takes the lead in determining how to best assess the spiritual, mental, emotional, and physical needs of the worker and family.	Is willing to be transparent with trauma counselors and others to allow for best assessment of individual needs and needs of family.
D-6	Ongoing support and care for worker and family	Either the B/A team or another team assembled by the church specifically for this situation takes responsibility to walk alongside the worker and family as they deal with the crisis trauma.	Someone from the agency is appointed to be the liaison with the church in this period of trauma recovery.	Is transparent with church leaders and those assigned to help them through crisis.
D-7	Assessment of readiness for return	Has veto approval if not comfortable that worker is ready to return to assignment.	If/when worker requests to return to the field, agency takes the lead in considering whether conditions and requirements have been met. Before a return is approved, agency and sending church must be fully in agreement that the worker is ready.	If chooses, initiates request for approval to return to the field. Agrees to abide by the decision of agency and sending church.

E. RETURN FOR JOB CHANGE OR RELOCATION WITH SAME AGENCY

See guidelines under first section in document, "Pre-Return Action Steps for All Transitions."

#	Task/Concern	Sending Church	Agency	Worker
E-1	3-way discussion of potential change	If worker or agency does not initiate a discussion, church does.	Makes sure worker initiates a 3-way discussion of the change and its impacts. If agency has requested the reassignment, shares rationale with sending church.	Initiates early-on conversation with church when agency requests a major assignment change. If worker asks for a reassignment, seeks church counsel simultaneously with consulting with the agency. Articulates the impact on present ministry, particularly if church has high ownership.
E-2	Assessment of job skills and fit	If agency does not provide an assessment, church asks for and/or arranges such.	Provides professional assessment of the worker's fit for the new role.	Communicates clearly with church evidence of fit for new role. Shares evaluations of others close to situation regarding match with proposed new role.
E-3	Approval of change	Invests time needed to understand rationale for change. Using predetermined criteria, makes decision to approve or not approve.	Requires the full approval of sending church before official offer of new position or approval of change.	Recognizes that both church and agency must be fully on board with decision before it is finalized. Once change is approved, works with church and agency on how and when to communicate change to support team and others.
E-4	Financial arrangements during transition	Responds to special financial needs as able.		Communicates financial plan for transition period.
E-5	Additional training	Helps to fund additional training as needed and they are able.	Agency proposes or requires any necessary additional training for the role.	Communicates any additional training needs for new role.

F. RETURN FOR AGENCY CHANGE

See guidelines under first section in document, “Pre-Return Action Steps for All Transitions.”

#	Task/Concern	Sending Church	Agency	Worker
F-1	Discussion of potential change	Once aware of a potential change, opens dialog with agency if it is not initiated by worker or agency. If conflict is the genesis of the change, church decides whether to initiate a reconciliation effort for present relationship or if/how to assist with a transition.	If the worker does not initiate a 3-way conversation, the agency makes sure that there is at least a brief dialog with the sending church. Openly shares factors leading to the change and any related concerns.	As soon as an agency change is considered, initiates a conversation with sending church , including the agency in the discussion if possible. Respects the right of sending church, supporting churches, and individual donors to reassess whether they want to continue support.
F-2	Closure discussion with all 3 partners	Initiates discussion if worker fails to--ideally involving all three entities together.	If worker and church do not include agency in discussion, the agency initiates dialog— ideally involving all three entities, but at least between agency and church to clarify exit procedures.	Initiates discussion of specific exit plans with sending church. At a minimum keeps agency informed; a 3-way dialog is preferred.
F-3	Process for appointment for service with new agency	If reapplication or extensive research of the new relationship is needed, the plan for such is clarified with the worker.		Understands and accepts the sending church’s process and requirements.
F-4	Financial provision across transition and into new agency	Collaborates with worker to make sure all financial arrangements across the transition are transparent. Implications for family are carefully considered.		Provides church with complete information about the financial implications for the transition period.
F-5	Consideration of new agency	Collaborates with worker to exercise due diligence in studying the potential new agency, new field leadership, and new role for worker.		Worker is proactive in gathering and providing required information on new agency for their church’s consideration.

G. RETURN FOR CHANGE OF CAREER

See guidelines under first section in document, “Pre-Return Action Steps for All Transitions.”

#	Task/Concern	Sending Church	Agency	Worker
G-1	Consideration of skills assessment and counseling	Considers with worker the need for assessment and professional counseling. In the case of a couple, makes sure that both spouses are carefully debriefed and considered in the transition process. Has a list of professionals that provide coaching in this area. Assists in covering cost if needed.	Communicates with workers about the transferable nature of their skills from field role to possible new careers—via conference workshops or written materials. Illustrations of successful changes are helpful, as is a list of recommended coaches.	Requests assistance from church if desired.
G-2	Consideration of job training	Works with agency (where feasible) and with the worker to determine the need for job training or retooling for new job. Assists worker to determine how that will be financed.	Works with the sending church and the worker as feasible.	Requests assistance from church if desired.



This document is provided to you by [Catalyst Services' Leaders Toolbox](#). © 2018 Catalyst would be happy to help your church or agency consider how to adapt and/or implement these types of best practices. Permission is granted to edit the document for use in your church or agency context. Contact us for an easy-to-edit version. Direct all questions to info@CatalystServices.org.