

Welcoming a new pastor

Receiving a pastor is not hiring, and treating it like hiring is how churches get the first six months wrong. The pastor is **appointed by the bishop** under the itinerant system (§338); the church did not choose them and cannot dismiss them, and the SPRC's role is consultation, not selection (§428). What the church *does* own is everything that makes the appointment work: the house, the keys, the accounts, the introductions, and an honest account of how this place actually runs. This page is that checklist — including how it changes for a provisional elder, a deacon, a licensed local pastor, or a retired pastor under appointment, which is the part almost nobody writes down. For hiring lay staff — which really is hiring — see staff onboarding.

Before you start

Who owns this checklist. The SPRC chair, working with the trustees chair and the outgoing pastor. Name one person accountable for it, in writing, at the first meeting after the appointment is announced. In practice this fails when everyone assumes the outgoing pastor is handling it and the outgoing pastor assumes the committee is.

What you should already have. A current account register, a key log, and a document register — see the key log template. If you don't have them, building them *is* the first task, and building them in June is worse than building them in March.

What is not yours to decide. The appointment itself, the pastor's conference relationship, and the terms of their itineracy. Compensation is set by the **charge conference in consultation with the district superintendent** (§247.13), not by SPRC alone.

A thing worth saying out loud to your committee: clergy are members of the annual conference, not of your local church. They do not appear on your membership rolls, and they are not your employee in the way the office administrator is. Some of the friction in a first year comes from a congregation quietly expecting otherwise.

The workflow

Phase 1 — When the appointment is announced (spring)

- ☐ SPRC chair contacts the incoming pastor within a week. Not to discuss business — to say welcome and give them a name and a phone number.
- ☐ Confirm the **moving date** and who is paying for the move [usually conference or church policy — ask your district office].
- ☐ Trustees, SPRC chair, and the **outgoing** pastor conduct the annual parsonage review (§2533.4). Do it now, not in June: repairs need lead time, and this is the review the Discipline already requires anyway.
- ☐ Ask the incoming pastor directly about **household needs** — family composition, accessibility, pets, allergies, school timing. Ask; do not assume and do not guess from a photo.
- ☐ Begin the Day One packet — the written account of how the church runs. Assign sections to people who actually know the answers.

Phase 2 — Before moving day

- ☐ **Parsonage ready:** repairs done, professionally cleaned, utilities transferred or confirmed, working appliances, and a written inventory of what belongs to the church.
- ☐ Decide and write down **who pays which utility**. This is the single most common source of first-year parsonage friction.
- ☐ Keys and codes: cut them, log them in the key log, and schedule the alarm-code change for the day of transition — not a week after.
- ☐ **Accounts:** create the new pastor's church email; identify every account where the outgoing pastor is the owner, recovery address, or two-factor destination, and plan the handover for each. Do not wait until they've left the state.
- ☐ Bank: confirm which **lay financial officers** — treasurer, financial secretary, or a trustee — will be signers. Sound internal control keeps the pastor off the bank account entirely; adding them as a signer is not a step in this checklist, it's the thing this checklist avoids. Prepare the resolution for whichever lay officers are changing. Signature cards usually require an in-person visit and a charge conference or trustee action — start early. **Record the signers against the bank account in your account register**, the same as any other account holder — a signer list that only exists on a signature card at the bank is exactly the kind of fact this whole page is trying to get out of one person's head.
- ☐ Confirm **compensation** is properly recorded — set by charge conference in consultation with the DS (§247.13) — and that payroll knows the start date.
- ☐ Confirm **benefits and pension** enrollment through the conference and Wespath. This is conference machinery, not church machinery, but somebody has to check it happened.
- ☐ Stock the parsonage kitchen for the first two days, and put a note on the counter with the wifi password, the trash day, and one phone number.

Phase 3 — The first two weeks

- ☐ **Walk the building** with the trustees chair and whoever actually maintains it. Boiler, breaker box, water shutoff, the door that sticks.
- ☐ Hand over the **Day One packet** in person and talk through it. The document is not the handoff; the conversation is.
- ☐ Complete account transfers: ownership, two-factor destinations, recovery emails. Verify each one by signing in, not by assuming.
- ☐ Complete any **screening and boundaries training** the conference requires, and the church's own safe gatherings policy acknowledgment.
- ☐ Introduce to: the office administrator, the custodian, the treasurer and financial secretary, the lay leader, the SPRC chair, the trustees chair, and the organist or music director. Individually, not as a receiving line.
- ☐ Introduce to the **community**: the funeral home, the neighboring churches, the school principal, the food pantry, whoever the church partners with. Nobody hands a new pastor this list and it takes two years to rebuild.

Phase 4 – The first ninety days

- ☐ SPRC meets with the pastor to set **mutual expectations** in writing: office rhythms, day off, vacation and continuing education already scheduled, how communication works, what “full-time” means here (§338.1 makes that the DS’s call in consultation – write down what it means in practice).
- ☐ Review the pastor’s **responsibilities** together (§340) – not to police them, but so the committee and the pastor share one list rather than two.
- ☐ Confirm **continuing education** time and money are budgeted; §258.2 directs SPRC to arrange for it, and it is the first thing dropped in a busy year.
- ☐ Ask, at ninety days: *what did we not tell you that you had to find out the hard way?* Write the answer into the Day One packet for next time.

Who does what

Task	Owner
Appointment itself, consultation	Bishop, cabinet, DS (§338, 428)
Compensation	Charge conference, in consultation with DS (§247.13)
Parsonage condition, keys, insurance	Trustees (§2533)
Parsonage annual review	Trustees chair + SPRC chair + pastor (§2533.4)
Welcome, expectations, care, evaluation	SPRC (§258.2)
Account and record handover	Outgoing pastor + office administrator
Benefits and pension enrolment	Conference / Wespath, confirmed by treasurer
Payroll setup	Treasurer

Variations

By clergy relationship

Everything above holds. What changes is who initiates the appointment, what the pastor is authorized to do, and how much of the church's job is *formation* rather than welcome. Churches routinely treat all of these identically and then are puzzled by the parts that don't fit.

Elder in full connection. The baseline this page assumes. Appointed by the bishop under itineracy, and required to accept the appointment (§338); full-time service is the norm (§338.1). Sacramental authority comes with ordination and is not tied to your charge.

Provisional elder. Appointed by the bishop, and serving a provisional period of at least two years, during which the Board of Ordained Ministry provides a **residency curriculum** with covenant groups and mentoring; their service is evaluated by the district superintendent and the Board (§326). Critically, they serve under a **license** from the bishop authorizing pastoral duties including the sacraments **within and while appointed to that charge** — and it is renewed annually (§317.1–.2).

What this changes for the church:

- **The SPRC is part of a formation process, not just a personnel committee.** §258.2 already directs SPRC to interpret the preparation for ordained ministry to the congregation (§258.2g.6) and to interview, evaluate, and recommend candidates for licensed and ordained ministry (§258.2g.9). With a provisional pastor in the pulpit, that stops being abstract: what your committee says feeds a process that determines whether this person is ordained.
- **Protect the residency time.** Covenant groups, mentoring, and required events are not optional continuing education to be squeezed around the church calendar. Put the dates in the church calendar before the church calendar fills.
- **Evaluate honestly and early.** A committee that says only encouraging things for three years and then raises a concern in year four has failed the pastor, not served them.

Provisional deacon. Commissioned, and serving in ministries of Word, Service, Compassion, and Justice, in the local church or an approved appointment beyond it (§326.1), with the same residency and evaluation structure. If the appointment is part-time or shared with another setting, agree in writing which hours belong to you — this is where provisional deacons get quietly overcommitted.

Deacon in full connection. Appointed by the bishop in the conference where they hold membership, but — and this is the difference churches miss — **the appointment may be initiated by the deacon themselves**, or by the agency seeking their service, as well as by the bishop or DS (§430). Deacons are not itinerant in the way elders are. Practically:

- A deacon may well have found *you*, or be serving your church alongside another appointment. Ask what the whole picture is.
- A deacon's ministry is Word, Service, Compassion, and Justice (§328) — it is not a junior version of an elder's. Writing their role as “associate pastor who also does missions” misdescribes the order.

- Sacramental expectations differ. Do not assume; ask, and put the answer in writing so nobody is surprised at a funeral.

Local pastor (licensed). Licensed rather than ordained, and the license is **awarded only upon appointment to a pastoral charge** (§318). Authority to perform pastoral duties including the sacraments exists **within and while appointed to that charge**, and is renewed annually (§317.1–.2). Categories are full-time, part-time, and student, each with its own education and compensation requirements (§318).

What this changes:

- **Course of Study is a real, continuing obligation.** Build it into the schedule and the budget from the first month rather than discovering it in year two.
- **The license is annual.** Someone at the church should know when it renews.
- **Part-time means part-time.** §318's categories are tied to compensation levels; a church paying at the part-time level and expecting full-time presence is not having a misunderstanding, it is having a disagreement.

Retired clergy under appointment. Retired clergy may serve under appointment, and retired clergy *not* appointed to a charge hold their seat in the charge conference where they elect membership (§358.5a). Compensation, pension, and Social Security interact in ways that are genuinely specific — confirm the arrangement with your conference benefits officer **before** the first payroll, not after.

Associate pastors. §258.2g(7) directs SPRC to develop and approve written job descriptions for associate pastors in cooperation with the senior pastor, and the Discipline notes “associate pastor” is a general term for any pastoral appointment other than the pastor in charge (§339). Write the job description. The most common associate-pastor failure is not conflict; it is never having agreed what the job was.

By situation

No parsonage (housing allowance instead). Phase 2's parsonage tasks fall away, but the church still owes clarity: what the allowance is, when it is set, and that it was properly designated in advance by official action — a housing allowance designated after the fact generally doesn't work for tax purposes. Flag it to your treasurer and conference; don't improvise it.

Part-time or less-than-full-time appointment (§338.2). Everything above still happens, but the expectations conversation in Phase 4 becomes the most important item on this page rather than one of several. Write down what a quarter-, half-, or three-quarter-time appointment means in hours and in duties, and revisit it at six months, because it is the thing that quietly expands.

Multi-point charge. Every church on the charge does Phase 3's introductions, and the expectations conversation happens with all the SPRCs together at least once. Note that clergy appointed to multiple-staff settings have direct access to the bishop, cabinet, and SPRC as well as to the pastor in charge (§338).

A first appointment out of seminary. Add a mentor, and be more explicit than feels necessary about local practice — how funerals are handled here, who gets called first when someone is hospitalized, what the church expects at Christmas Eve. None of that is in anyone’s job description.

An interim or supply arrangement. Compress phases 1–2 and do them anyway. The temptation is to skip the account and key work because the arrangement is short — which is exactly how an account ends up owned by someone who left in 2019.

Elsewhere

- **Wespath** — the denomination’s benefits agency; pension and health enrollment for clergy runs through here, via your conference.
- **GCFA — Legal Services** — clergy tax and compensation guidance, including the housing allowance rules this page deliberately doesn’t summarize.
- **Lewis Center for Church Leadership** — research and short practical pieces on clergy transitions and first years.
- ***Guidelines: Pastor-Parish Relations 2025–2028*** — the official UMPH booklet for the committee that owns most of this page.
- **Your annual conference’s parsonage standards and moving policy.** Almost every conference publishes both, they are more specific than the Discipline, and they settle most of the arguments in Phase 2. Ask your district office first.

This is a starting point, not legal advice. Employment law varies by state, and your annual conference may have policies that go beyond the Discipline. Before you rely on anything here for a hiring, firing, or compensation decision, run it past your conference office or chancellor.

Paragraph references are to the 2020/2024 Book of Discipline. This document paraphrases; for the binding text, see the Discipline itself.

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