

Staff Onboarding — the workflow your church has never had

Most churches have never onboarded anyone. A new administrative assistant shows up, someone finds a key, the email gets created three weeks later, and Safe Gatherings comes up in month four when a volunteer asks. Larger churches have proper systems; everyone else has a shrug. This is the checklist that turns the shrug into a process — for any paid hire, and adaptable for key volunteers.

Before you start

Don't schedule a first day until these exist:

- ☐ **A written job description**, developed with the pastor and approved per your staff policy (§258.2g.12). If there isn't one, write it first — the job-description templates exist so this takes an hour, not a month.
- ☐ **A named owner for this checklist**. One person — usually the office administrator or the pastor — owns getting every box checked. A checklist owned by “the church” is owned by no one.
- ☐ **The employment basics arranged**: pay rate and schedule confirmed with the treasurer, and the required federal/state employment paperwork identified. We deliberately don't summarize tax or eligibility forms here — use the IRS and USCIS official pages (see Elsewhere) and your payroll provider's checklist.

The workflow

Before day one

- ☐ Offer letter or simple employment agreement signed; start date set.
- ☐ Payroll set up with the treasurer/bookkeeper (rate, schedule, time-tracking method if non-exempt — check classification, don't guess; see Elsewhere).
- ☐ Church email address created. **Record it — and every account this person will hold — in your account registry**, whatever form that takes: who owns it, who can reset it, where two-factor codes land. Recovery must never point at a personal cell alone.
- ☐ Key or door code arranged; alarm code if applicable. Write down *that* they hold it (never the code itself) on the key log.
- ☐ Safe Gatherings (or your conference's equivalent certification) application started — it takes days to weeks, so it starts before day one, not after.
- ☐ Workspace ready: desk, computer login, phone extension, copier code.
- ☐ Tell the congregation. A new staff member introduced in worship and the newsletter starts known instead of mysterious.

Day one

- ☐ Welcome by the pastor — not handed off cold to whoever's in the office.
- ☐ Building tour: exits, breakers, thermostat, supply closets, where the Christmas decorations hide, which door sticks.

- ☐ Keys/codes handed over; key log signed.
- ☐ Personnel policy and job description reviewed together; both acknowledged in writing (a dated signature on a copy is enough).
- ☐ Remaining employment paperwork completed and filed.
- ☐ The introductions map (below) — day one includes meeting or at least emailing the SPRC chair.

First week

- ☐ Walk the weekly rhythm together once: bulletin deadline, when the pastor is unreachable, how facility requests come in, what Sunday morning needs.
- ☐ All accounts live and tested — email sending, calendar access, giving or management software as the role requires; each one in the registry.
- ☐ Safe Gatherings progress checked.
- ☐ A standing check-in on the calendar with their supervisor — 15 minutes weekly beats an open door nobody walks through.

First 90 days

- ☐ 30-day conversation with supervisor: what's unclear, what's missing, what surprised them. Adjust the job description if reality already disagrees with it.
- ☐ Safe Gatherings certification confirmed complete; expiration date recorded wherever you track certifications.
- ☐ 90-day review with the supervisor and an SPRC representative — against the job description, in writing, no surprises. This also sets the pattern for the annual evaluation (§258.2g.5).
- ☐ Checklist owner closes this list out and files it. That file is the start of the personnel record.

Who does what

Role	Owns
Pastor	Welcome, expectations, weekly-rhythm walk-through
Checklist owner (usually office admin)	The list itself — every box, chased to done
SPRC chair	Job description, policy acknowledgment, 90-day review (§258.2g)
Treasurer/bookkeeper	Payroll, employment paperwork filing

One person can wear three of these hats in a small church. The hats still exist.

Variations

- **Volunteers in key roles** (nursery coordinator, counters, youth helpers): skip payroll; keep the job description (one page), Safe Gatherings, the key log, the registry entry, and the introductions. Certification tracking matters *more* for volunteers — there are more of them and nobody’s watching expiration dates.
- **Part-time and shared staff**: the whole list applies; the failure mode is assuming someone at 10 hours/week will “pick things up.” They have fewer hours to pick anything up — the checklist is how they survive.
- **Single-board churches**: replace “SPRC chair” with whoever holds the staff-relations function on your board; the closed-session and confidentiality rules still apply to those conversations (see the governance-model pages).
- **A new pastor** is a different, bigger workflow — appointments, parsonage, handoff of accounts and records. See the pastoral-transition checklists.

Elsewhere

- **IRS — employer forms and first-hire requirements** — the official source for federal employment paperwork; don’t take a summary’s word for it, including ours. (irs.gov)
- **U.S. Department of Labor — FLSA topics** — for the exempt/non-exempt question you should ask about any salaried role. (dol.gov)
- **Safe Gatherings** — the abuse-prevention certification program many UMC conferences require; application, training, and background check in one flow. (safegatherings.com)
- **GCFA / UMC Support** — legal and HR resources for local churches, including employment topics. (gcfa.org)
- **Your payroll provider’s new-hire checklist** — Gusto, QuickBooks, and the rest each publish one; it complements this list on the tax-and-forms side.

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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