

On-Boarding as a New UMC Leader

A NEW APPOINTMENT INVOLVES INHERITING NEW PEOPLE

In some cases, it involves mostly new lay leadership and part-time or volunteer staff, but in other cases, it involves a staff team as well. This explanation flyer explains both situations. When inviting in the On-Boarding process, all churches will conduct a Lay Leadership Dinner session, and those churches with a staff team will also include a staff version.

Allow them, as a team, to get to know you by hearing the same message.

Engage them at the onset with a structured and inclusive process that enhances the transition for you and them. Eliminate the need to guess what they want to know about you.



TYPICAL NEW LEADER BEGINNINGS

When a new Lead Pastor, or any critical-level church appointment, is announced, people want to immediately schedule one-on-one time with the new leader; and within days the new leader's calendar is full for weeks. This can result in an uneven launch as each person shares his or her view of the church and lobbies for needs that favor a specific bias. This type of entrance typically generates more questions than clarity, leaving more uncertainty than resolve.

Manage The Risks Through On-Boarding

The emotional experience between being appointed and assuming the pulpit is typically extraordinary. As news spreads throughout the receiving congregation, speculation begins about the wants, style, and preferences the new pastor may represent. On-boarding intercepts assumptions and provides a proven process for the new pastor to evaluate and respond to structured questions.





WHAT ON-BOARDING OFFERS

A new leader's on-boarding experience can radically transform feelings of anxiety to excitement and clarity. This powerful experience is well-established and time-tested in organizations where a great premium is placed on starting well. It's a one full day's approach that relies on the expertise of a trained facilitator to help teams proactively share information in both directions: staff team to new pastor and new pastor to staff team.

All On-boardings begin with a one-hour phone conversation between the facilitator and the new pastor. This is to build trust and to explain the process and the advantages for the church, participants, and new pastor. If a pastor is inheriting a staff team, the On-Boarding Day begins in the morning with the church staff team and the facilitator. (If the pastor is inheriting volunteer staff or a few part time staff, only the Lay Leadership version outlined below is conducted.)

This morning session requires 2 hours to gather critical data from the staff team. Between the morning and afternoon sessions, the new pastor has a 1.5 hour one-on-one coaching session with the facilitator to prepare the new pastor to lead the afternoon session.

Staff On-Boarding Step One:

2 Hours

Facilitator with staff team

The new pastor does a 3-minute welcome to the On-Boarding session and then leaves so that the facilitator can ask the staff 12 questions that have been pre-approved by the pastor. The facilitator records data without names to keep the respondents' anonymity.

Staff On-Boarding Step Two:

1.5 Hours

Coaching Session with the Facilitator and the New Pastor

The staff members leave the room, and the pastor returns to examine their responses. In this private session, the facilitator prepares the new pastor to lead the afternoon session.

Examples of Common Questions:

1. What do we already know about our new pastor?
2. What do we wish we knew about our new pastor?
3. How would we describe the DNA of our congregation?
4. What are our hopes and dreams for our church?
5. What can we offer our new senior pastor?



Staff On-Boarding Step Three:

2 Hours

New Pastor Leads the Meeting

The pastor thanks the staff for their input and leads the afternoon meeting, responding line-by-line, thought-by-thought, to the list of questions and responses created that morning. Healthy dialogue emerges as the new pastor responds to questions and feedback to promote group clarity and understanding. As the pastor leads the meeting, the trained facilitator observes from afar and takes notes about decisions made, items for follow-up, and questions that remain unanswered. When necessary, the facilitator keeps the meeting moving forward.

The best timing for On-Boarding can be prior to arriving for the appointment as well as in their first six weeks of the start date. The early sessions relieve anxiety in advance and the later sessions allow the new pastor to get some early feedback.



ON-BOARDING WITH LAY LEADERSHIP

(Conducted in all churches regardless of size)

Lay Leadership On-Boarding is typically a dinner conducted from 5:30 - 8:30 p.m. with the meal ready at 5:00 - 5:15. The size of participants can vary from 15-100 but always includes the full committees of SPRC, Trustees, Finance, delegates, etc. The new pastor greets everyone, welcomes them, and leaves so the data is anonymous. The facilitator introduces the process during the time the attendees are eating. The pastor returns for the last 1.5 hours, responds to the data while allowing the laity to get a deeper dive knowledge of who he/she is as a pastor, leader, and human being. This is a shorter version of what a staff experiences and may be the only session done with churches where there is not a substantial number of staff. Where a church has a few part-time or volunteer staff they come to this session.

A PRICELESS VALUE

New Leader On-Boarding can jump-start transitions and spare months of hearsay and assumptions. With the help of a trained facilitator, this launching process can start building mutual trust and help participants discover shared values and shared hopes for the future of the church.

