**Executive Summary**

In his book, “The First 90 Days: Critical Success Strategies for New Leaders at All Level”, Harvard Business School professor, Michael Watkins makes the case that creating and executing a plan of action in the first 90 days in a new position is critical because *“small differences in your actions can have a huge impact on long-term results. Leaders at all levels are very vulnerable in their first few months in a new role because they lack in-depth knowledge of the challenges they’ll face and what it will take to succeed with their new call. Failure to create momentum in the first 90 days virtually guarantees an uphill battle for the rest of one’s tenure. Creating and executing a plan in the first 90 days will get you up to speed faster and achieve more sooner. A plan will help you diagnose your situation and understand its challenges and opportunities. You’ll also learn how to assess your own strengths and weaknesses, how to quickly establish priorities, and how to develop key relationships that will help you succeed.” (Watkins, 2003).* This template has been developed to assist stipendiary rectors and vicars, new to a congregation, jointly create a 90-day transition plan with their senior warden or bishop’s warden.

While the template offers many actions, it is intended that you **customize** a plan to fit your specific needs, the needs of the congregation and community. **Not every area indicated will necessarily be a priority right away**. Other actions, not included in this template, may need to be added to address an objective or purpose, as appropriate.

By creating and executing a 90-day transition plan, you will:

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| * Identify and establish key relationships within the congregation | * Lay the ground work for building trusting relationships |
| * Expedite becoming known to members | * Be introduced and connect with key community leaders and organizations |
| * Learn about the history of your new congregation | * Establish or continue the presence of the church in the community |
| * Understand the church finances | * Build supportive relationships with other clergy in the area and in diocesan convocation |
| * Learn about the culture of your new congregation (how they do things) | * Establish a relationship with the Mission Amplification team and others for ongoing support |
| * Identify and address early opportunities for success |  |

**Key Points in Customizing Your Plan:**

The plan is to be created jointly with the senior warden or bishop’s warden, and hit is important to actively seek his or her input and support. Creating a joint plan will help to build working relationships early with lay leadership and encourage a lay/clergy collaborative partnership. As indicated in the letter of agreement, the plan should be created within the first 30 days of starting at your new church, although you may want to work together to create the plan prior to your first day. It is intended to be customized in conversation together. The agreed upon plan is then signed by you and your warden. Once signed, a copy is sent to Kathryn Herman at kherman@epicenter.org. For questions or clarifications, contact the Rev. Canon Joann Saylors, Canon for Mission Amplification at [jsaylors@epicenter.org](mailto:jsaylors@epicenter.org). A member of the Mission Amplification team will reach out around the 90-day mark to check in, see what you were able to complete, think with you about priorities for the next three to six months, and discuss resources that may be available to help you in your context.

It is highly recommended that the plan be reviewed on at least bi-weekly with the senior warden to promote frequent ongoing communications early in the relationship and head off as many

surprises as possible and track actions against the plan, adjusting, as appropriate.

**Name of Clergy:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Name of Senior Warden:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Church:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **ASA:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Total Revenue**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**90-Day Transition Plan Start Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **End Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Purpose** | **Internal Relationship Building and Gaining Historical Knowledge** | **Actions Taken/Date Accomplished** | **Notes** |
| Introduction the new rector/vicar to the congregation within a week or two after arrival. | Work with vestry/bishop’s committee to plan and hold a celebration to introduce the new Rector/Vicar and spouse (if applicable) to the rest of the congregation.  Rector/vicar must be prepared to address the congregation. |  |  |
| Establish regular communications, build trust with senior warden and stay informed on key issues and items requiring decisions. | Meet weekly with senior/bishop’s warden to assess progress against goals and stay informed of key issues. (See Attachment A) |  |  |
| A transition committee helps to ensure a smooth entry for the new rector.  Expand the base of support for the new Rector/Vicar and speeds up learning about church history, hot topics, undiscussables, and sacred cows that impact the church ad its relationships. | Appointed by the vestry/bishop’s committee to serve as a committee of welcome, to introduce the new rector and his or her family to the community, to help in relocation, and to assist in the beginning of the new ministry throughout the new rector’s first year. The committee includes the members of the recent search committee because of their familiarity with the new rector. This may be the vestry/bishop’s committee depending upon the size of the congregation. |  |  |
| Assess strengths and vulnerabilities in the congregation’s lay leadership. | Though observation and conversation, determine who are the lay leaders and who might be leaders, given an opportunity to serve. Is there a need to conduct a gifts discernment program? Are people eager to serve but not sure how. |  |  |
| Establish relationships with individual members of the Vestry and others of influence in the church. | Meet one-on-one with all vestry/bishop’s committee members and other identified lay leaders. Get individual perspectives about the church and areas of importance. (See Attachment B) |  |  |
| Learn how current ministries are functioning, hear leaders’ concerns, and set expectations for the first year. | Identify and visit key ministry leaders in the parish to elicit their hopes, willingness and ability to support new initiatives. Explore and set realistic expectations for the first year. |  |  |
| Be Present | Attend youth events  Attend special church/ministry sponsored events. |  |  |
| Understand the current pastoral care needs to include how the needs are being met and determine how best to proceed in the next 90 to 180 days. | Meet with those providing pastoral care to understand and conduct pastoral visits or calls if necessary to those not able to attend church. Work with pastoral care givers to create a plan for the next 180 days. |  |  |
| Learn about the items most important to the current congregation. | Review the Holy Cow Congregational Assessment Tool report (or other survey) to identify priority concerns and begin future planning. A member of the Mission Amp team is available to help you understand the report. |  |  |
| Build foundation for productive relationships with the Vestry. | Plan and conduct a mini-Vestry retreat to get to know you and each other. Set realistic expectations for year one. |  |  |

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| **Purpose** | **Day School Relationships (if applicable)** | **Actions Taken/Date Accomplished** | **Notes** |
| Create positive and collaborative relationships with the Head of School and School Board | Meet with Head of School and School Board President/Chair to set up recurring regular ongoing meetings. Seek clarity of the church and school relationship and your role within the school. |  |  |
|  | Attend the School Board meetings, being sure to introduce yourself |  |  |
|  | Review the most recent accreditation documents. Follow up with Head of School to seek clarification of questions. |  |  |
|  | Schedule a Meeting for the Rector and Head of School with the Rev. David Dearman from the Diocesan Commission in Schools ([dcdearman@gmail.com](mailto:dcdearman@gmail.com)) |  |  |
|  | Review school bylaws for understanding and conformity. |  |  |
| **Purpose** | **Administrative/Financial Tasks** | **Actions Taken/Date Accomplished** | **Notes** |
| Safe Church Compliance | Review all safe church records. Identify and meet with the SRA.  Create plan to close compliance gaps, if any exists.  Contact Safe Church Office for information and assistance, as needed. |  |  |
| Learn how Church records are updated, maintained and who does it | Review parish registers.  Review membership records and contacts.  Understand how records are kept up to date.  Review last five years Parochial reports. |  |  |
| Know the financial reality and history before taking making changes or taking actions | Review prior year audit reports, financial statements and bank statements for all accounts in Church’s name.  Attend Finance committee meetings. |  |  |
| Learn how reports are created and the key report elements | Meet with Treasurer and outside accountant, if applicable to understand the budget process, invoice processing, etc. |  |  |
| Know your insurance | Review insurance policies. |  |  |
| Understand key topics important to the vestry/bishop’s committee | Review minutes from last 2-3 years of vestry meetings.  Look for recurring themes, topics. |  |  |
| Know your donors. | Review parishioners’ giving history. (Respecting and maintaining confidentiality). |  |  |
| Learn the physical plant | Complete facilities walk through with Jr. Warden to identify what is working and what needs attention. |  |  |
| Establish Rector/Vicar’s role as leader | Work with Senior Warden to set meeting agenda and assume facilitation of Vestry meetings within the first 30 days. |  |  |
| Model Financial Stewardship | Make a personal pledge |  |  |
| **Purpose** | **Building Community Relationships** | **Actions Taken/Date Accomplished** | **Notes** |
| Establish community relationships | Meet with local officials: Mayor, City Council rep, Sheriff, Hospital CEO, School principals |  |  |
|  | Identify key local non-profit agencies. Set up introductory meeting with CEO |  |  |
|  | Meet with clergy from other denominations in the area. |  |  |
|  | Ask vestry members to identify and arrange an introduction of 3 non-members in the community who would be important to know. |  |  |
| **Purpose** | **Liturgical** | **Actions Taken/Date Accomplished** | **Notes** |
| Understand how worship services and other programs are planned and executed. | Meet with Organist/Choirmaster to establish regular communication and to discuss your mutual needs and expectations. |  |  |
|  | Meet with Altar Guild Chair to establish communication and review your needs and expectations.  Listen for any concerns that might be raised. |  |  |
|  | Review worship bulletins and newsletters from prior years. |  |  |
|  | Set up time with to listen to leaders about what makes worship services at the church special. |  |  |
|  | Preach! |  |  |
|  | Plan for upcoming liturgical season |  |  |
| **Purpose** | **Communications** | **Actions Taken/Date Accomplished** | **Notes** |
| Know what is being communicated by whom  Establish your role as the approver of communications | Review the website, Facebook page, newsletters, other church social media accounts, internal email distribution lists.  Learn who oversees each one.  Learn how and when information is posted and by whom.  Meet with each responsible party to set expectations. |  |  |
|  | Consider frequency of and media for updates from the rector. |  |  |
|  | Ensure the website information and photos are updated. |  |  |
|  | Contact Diocesan Communications team for assistance, if needed. |  |  |
| **Purpose** | **Diocesan Relationships** | **Actions Taken/Date Accomplished** | **Notes** |
| Maintain communications with Diocese and obtain the support needed for a smooth transition. | Schedule meeting with your Regional Bishop.  Contact Convocational Dean and participate in monthly Clericus meetings. |  |  |
|  | Communicate with the diocesan Finance team as needed to understand the assessment, insurance, audit requirements and other budget or finance related items, including any balances in the diocesan Participating Fund. |  |  |
|  | Contact Diocese to plan and schedule Celebration of New Ministry Worship Service  Review the Diocesan *Clergy Manual*  Review the Diocesan *Constitutions and Canons*  Become familiar with *the Manual of Business Methods in Church Affairs.* |  |  |
| Calendar Diocesan Events | Diocesan Council, Clergy conference, Convocational clericus meetings |  |  |
| **Purpose** | **Church/congregation unique issues** | **Actions Taken/Date Accomplished** | **Notes** |
| Add items specific to this congregation not covered above |  |  |  |
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**Recommended Resources:**

*The First 90 Days: Critical Success Strategies for New Leaders at All Levels*, by Michael Watkins, Harvard Business School Publishing, Cambridge, MA. 2003.

*How to Hit the Ground Running: A Quick-Start Guide for Congregations with New Leadership* by Neal. O. Michell. Church Publishing, New York. 2005

Episcopal Church Foundation (ECF). Vital Practices <http://www.ecfvp.org/>

**Summary of 90 Day Plan, Actions and Learnings**

**Clergy:**

Signed/Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Senior Warden:**

Signed/Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Canon for Mission Amplification**:

Signed/Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Canon to the Ordinary:**

Signed/Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COMPLETED 90-DAY WILL BE PLACED IN THE DIOCESAN FILES

ATTACHMENT A:

**Weekly Meeting with Senior Warden - Template**

* **Opening Prayer** (Alternate who opens with prayer)
* **Personal Update/Check in**
  + Personal and professional news?
  + Any stories to share?
* **(First meeting) Review Letter of Call and Letter of Agreement**
  + Ensure common understanding of the agreement
  + Ask clarifying questions,
  + Identify areas not covered but need discussion and/or agreement
* **Set regular date, time and location for weekly meeting**
* **Update on Congregation/Staff**:
  + Any members in need?
  + Success stories?
  + Congratulations?
* **Update on/Staff**:
  + How is it going?
  + Any concerns?
  + Success stories?
  + Suggested recognition?
* **Reflections since last meeting:** 
  + Any new learnings?
  + Issues resolved?
  + Items still needing attention.
  + Concerns from the Flock?
* **This meeting: Review the work for the next seven days?** 
  + What’s hot?
  + Who needs a visit?
* **Review 90-Day Plan**
  + Capture actions and activities already taken
  + Share lessons learned
  + Prioritize areas of focus for the week

ATTACHMENT B

**One on One Meeting with Individual Vestry Members/Lay Leaders**

* **Opening Prayer** (Alternate who opens with prayer)
* **Getting to Know Each Other** (A dialogue to get to know each other; NOT an interview)
  + **Personal Background** 
    - Tell me about your family?
    - Where did you grow up?
    - Family members? Here? Elsewhere?
    - What do you do when not here at the church?
    - What do you prefer to do when not at the church?
    - How long in the Episcopal church? This church?
    - Tell me about your ministry in the church. When they meet, who attends, who is reached, etc.?
    - What ministries bring you the greatest satisfaction?
  + What do you love about this church?
  + What keeps you coming back?
  + What concerns do you have?
  + What advise do you have for me (the new clergy person)?
  + **Clergy Personal Background**

**Clergy person now answers the above question and others, as appropriate.**

* **Thank the person for their time and the conversation.**
* **How best to reach you?**
* **Your sabbath day off**
* **Any parting comments?**
* **Closing Prayer**