

# Action Plan

## For Transitioning Clergy

### 30-60 Days Prior to the Move: Laying the Groundwork for a Smooth Transition

As soon as your new appointment is made, your transition has begun! There are many items to attend to as you prepare—here are a few expectations from your District Superintendent:

- Review the resources on the conference web site related to Clergy Moves. Both the clergy and the P/SPR should review these resources.
- Prepare the items listed on your “On Saying Goodbye” Checklist. You should receive this checklist by email with your move packet from the Center for Leadership Formation. If you need another copy, email Ana Robles at [arobles@txcumc.org](mailto:arobles@txcumc.org)

# The 90-Day Action Plan

Develop and prepare a written 90-Day plan divided into 30-day increments. You may use the following example as a guide, but be sure to make it your own plan. Send your plan to your District Superintendent. Your DS will respond either to approve the plan as is or to make suggestions for changes. Submit a copy of the plan to the leadership of the church, keeping in mind that there may be some parts of the plan that are so personal that you will want to revise the plan that you give them. Discuss your progress on fulfilling the plan with your lay leadership on a monthly basis. Once the 90 Day period is ended the pastor and SPR will submit a final report to the DS. This report will form the basis of your assessment for that year.

# First 30 Days: Learning and Building Personal Credibility

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## First 30 Days Priorities

To build your plan, determine your top 5 priorities for this time period. You may use the blanks provided to rank those provided, and you are encouraged to add your own. List your priorities at the top of your plan. Beneath each priority, describe the specific steps you will take to address the priority. The steps should be measurable goals. For help on developing SMART goals, see [SMART Goals: Definition and Examples | Indeed.com](#). Again, feel free to adapt the suggestions here or develop your own priorities and steps to fit your context.

\_\_\_ Getting settled into your office and setting your routine workweek

\_\_\_ Attending to your family's transition needs

\_\_\_ Having the "Church and Community" Conversation with the Pastor/Parish Relations Committee, Lay Leader, Chairperson of Ad Board/Council, Finance Chairperson, and the Natural Church Development Church Health Team Chairperson. You may find using information from Mission Insite to be helpful to this conversation. For more information on Mission Insite, go to the Planning and Information Page at the end of this document.

\_\_\_ Talk with leaders about the State of the Church. Historical information may be helpful to that conversation. Ezra is a website that offers such data. Information about Ezra can be found on the Planning and Information Page at the end of this document.

\_\_\_ Building high-priority relationships with leaders, influencers, those with immediate pastoral care needs, and those in the community

\_\_\_ Having the Expectations Conversation with the Pastor/Parish Relations Committee

\_\_\_ Discovering and understanding the church's stated and unstated vision for ministry

\_\_\_ Assessing the style of leadership you need to bring to the congregation

\_\_\_ Assessing the congregation's awareness of and receptivity to the Conference Vision, the Conference's Three Focus Areas, and the mission and ministry of the United Methodist Church through connectional giving.

\_\_\_ Determining projects that will need advance planning and support, such as the annual stewardship campaign or a church wide event

\_\_\_ Any other priority you think is important for your first 30 days:

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### **Early Success Desired**

In addition to specific goals, there may be some things that you see you could do that would constitute "Early Wins." By successfully resolving these issues, you are cementing your role as a leader. List any of those Early Successes you hope to achieve here.

1. \_\_\_\_\_

2. \_\_\_\_\_

## **Second 30 Days: Seeking Some Early Wins**

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Repeat the same process for the Second 30 days: Determine your top priorities for that time period. List them, along with specific goals that will help you address those priorities, the measurement you will use to determine that you have addressed it, and by what date you expect to have completed each step. Again, for guidance on developing SMART goals see [SMART Goals: Definition and Examples | Indeed.com](#) .

### **Second 30 Days Priorities**

\_\_\_ Assessing your first 30-Days. Discuss your progress with the key lay leadership.

\_\_\_ Assessing your team (Lay leadership and staff) and determining how you will lead them.

\_\_\_ Analyzing your early judgments about the congregation for accuracy and adjusting your leadership style to your emerging understanding of the situation.

\_\_\_ Identify an important issue that you can address that will require few resources but that can have a tremendous impact on the congregation and their perception of your leadership if you deal appropriately with it.

\_\_\_ Help the congregational leadership find ways to interact with the Conference Vision and the Three Focus Areas.

\_\_\_ Work on ways to communicate the vision of the church to keep it before the congregation.

\_\_\_ Any other priority you think is important for your second 30 days.

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### **Early Success Desired**

In addition to specific goals, there may be some things that you see you could do that would constitute “Early Wins.” By successfully resolving these issues, you are cementing your role as a leader. List any of those Early Successes you hope to achieve here.

1. \_\_\_\_\_

2. \_\_\_\_\_

# Third 30 Days: Refine, Identify, Develop, and Assess

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## Third 30 Days Priorities

Repeat the same process for the Third 30 days: Determine your top priorities for that time period. List them, along with specific goals that will help you address those priorities, the measurement you will use to determine that you have addressed it, and by what date you expect to have completed each step. Again, for guidance on developing SMART goals see [SMART Goals: Definition and Examples | Indeed.com](#) .

\_\_\_ Assessing your first 60 days. Discuss your progress with your lay leadership.

\_\_\_ Having a conversation with the Pastor/Parish Relations Chairperson, Finance Chairperson, Trustee Chairperson, and the Administrative Board/Council Chairperson about finances.

\_\_\_ Identify financial challenges

\_\_\_ Developing a strategy for finance, budgeting, connectional giving, nominations, structure, and staffing.

\_\_\_ Refining mid-term goals that include specific ways the church will address the Conference Priorities.

\_\_\_ Having a conversation with the Pastor/Parish Relations Committee about your growth plan as a pastor

\_\_\_ Assess the alignment of the church's resources toward the church's stated vision and continue to communicate the vision.

\_\_\_ Have the "SWOT" conversation with key leaders. Information on developing a SWOT matrix can be found on the Planning and Information Page at the end of this document.

\_\_\_ Any other priority you think is important for your third 30 days.

### **Early Success Desired**

In addition to specific goals, there may be some things that you see you could do that would constitute “Early Wins.” By successfully resolving these issues, you are cementing your role as a leader. List any of those Early Successes you hope to achieve here.

1. \_\_\_\_\_

2. \_\_\_\_\_

## Planning and Information Tools

MissionInsite is a powerful online tool for learning important demographic information about your mission field. You may log in to Mission Insite at [www.missioninsite.com](http://www.missioninsite.com). If you need help logging in or knowing how to use Mission Insite, contact your district office.

Ezra is an online tool that offers statistical history of our churches based on year end reports. You may log in to Ezra at: [ezra.gcfa.org](http://ezra.gcfa.org) For log in information contact your district office.

SWOT Analysis (YouTube Presentation) <http://www.youtube.com/watch?v=GNXYI10Po6A>



## 90 Day Action Plan Final Report

The following questions should be answered separately by the SPR and the pastor. Please check with your District Superintendent to learn by what dates he or she would like to receive the answers. The pastor and SPR are encouraged to discuss their respective responses with one another.

To be answered by the pastor:

How well are you adjusting to this new ministry setting?

What did you learn about the church during the first 90 Days?

What strengths and opportunities for ministry have you observed?

What growth areas and challenges for ministry have you observed?

What are your short term and long term leadership priorities?

To be answered by the SPR:

How well is the church adjusting to your new pastor?

What did you learn about the pastor during the first 90 Days?

What strengths for ministry have you observed in your new pastor?

What growth areas in ministry have you observed in your new pastor?

How can you best support your pastor both in the short term and long term?