

Template Roadmap for Onboarding a New Rector

| Activity | Time Period | Objective | Activities | Deliverables |
|---------------------------------------|--------------|--|--|---|
| Orient | 0 – 2 Months | Become familiar with staff, facilities, worship structure, leadership | <ul style="list-style-type: none"> - Conduct one-on-one meetings with staff - Conduct one-on-one meetings with other key organizational players (e.g. school chaplains or heads, if applicable) - Conduct one-on-one meetings with parish lay leadership – both designated and politically opportune - Conduct weekly meetings with staff - Arrange with Canon Paula Clark for a meet and greet with Bishop’s staff at Church House | none |
| Develop Relationships | 0 – 9 Months | Cement relationship with parishioners and others in the diocesan community | <ul style="list-style-type: none"> - Host/attend foyer groups with all parishioners - Conduct individual “listening” meals/meetings with key players in the parish - Perform pastoral visitations to all on the sick or shut-in list - Attend the EDOW Genesis training program for clergy in new cures - Meet with regional clergy colleagues (official or unofficial, depending on region) - Conduct twice monthly meeting with Transition Committee for support and intel | none |
| Ground Staff and Governance Structure | 3 – 9 Months | Intentionally assess, and if necessary, modify | <ul style="list-style-type: none"> - Establish annual goals for direct reports (by 3 month mark) - Ensure daily interaction with direct reports - Ensure weekly team meetings with direct reports - Review parish by-laws and vestry roles - Ensure well-functioning vestry meetings - Ensure bi-monthly meetings with extended staff and volunteers | <ul style="list-style-type: none"> - Performance review templates - Healthy staff norms - Healthy vestry meeting norms and movement towards a vestry that functions appropriate to parish size/mission |



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| Review Finances and Operations | 3 – 9 months | Intentionally assess and lay groundwork to modify, if necessary | <ul style="list-style-type: none"> - Review budgets and balance sheets - Meet with book-keepers, accountants, treasurers, and other financial partners to ensure deep understanding of finances - Consider financial giving patterns relative to best practices (are we doing what we’re doing well enough?) - Consider financial giving patterns relative to thoroughness (are we doing enough of annual giving, planned giving, and capital giving?) - Consider financial giving patters relative to ECUSA norms, EDOW norms, and the gospel imperative to be sacrificial | <ul style="list-style-type: none"> - A healthy budget - A plan for renewed financial health in the following year - Strategies for above |
| Lead Liturgy and Worship | 3 – 9 months | Establish strong presence in the pulpit and help create joyful, energetic tone in worship | <ul style="list-style-type: none"> - Set clear expectations for collaborative, creative worship planning among all on worship/music team - Explore parish tolerance for new styles of worship, guest preachers, lay preachers, alternative music, etc. | <ul style="list-style-type: none"> - Strong, well delivered sermons - Joyful, well executed worship |
| Expand Supporters | 9 months + | Engage and involve new stakeholders in the work of the parish | As priorities come into focus, begin to strategically reach out to new individuals, regional parishes, and other partners to bring funding, expertise and other resources | none |
| Establish Strategic Priorities | 9 – 18 Months | Focus programmatic and funding priorities to advance mission | Work with Wardens and other key leaders to set a vision for the parish, articulate its mission, and detail strategic priorities to support the same | <ul style="list-style-type: none"> - A compelling vision - Annual and three-year goals |
| Operationalize Priorities | ongoing | Establish annual operational and budget goals and milestones to ensure implementation of strategic plans | <ul style="list-style-type: none"> - Establish annual goals for the parish overall, for the rector personally and for each member of the staff - Ensure budgeting process for next fiscal year reflects the goals and priorities of the institution | |