

SETTLEMENT HANDBOOK

for Ministers and Congregations

Ministerial Transitions Office

Unitarian Universalist Association

October, 2008

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<http://www.uua.org/transitions>

2008 Preface

New times teach new duties. Over the past several years, three phenomena have made the search for ministerial leadership more challenging for member congregations of the Unitarian Universalist Association:

- Many new ministers are more oriented toward ministry in the community beyond the parish than to ministry with and to a congregation. Although new ministers continue to enter our fellowship at a high rate, it is not always easy for a congregation to find even one ministerial prospect, much less several.
- As more Unitarian Universalist congregations operate year round, new needs for ministry are less likely to occur by the school-year calendar.
- The rising number of growth-oriented congregations brings with it a more opportunistic attitude toward ministry. The hope that “we’d like a minister with these attributes, to help us to take advantage of these particular opportunities,” is heard with increasing frequency.

Thus the UUA’s Transitions Office seeks to move more nimbly in order to better assist congregations in their needs for ministry—various kinds of ministry—at any time of year.

Nimbleness, yes; haste, no. Once upon a time ministerial transition was thought of as the absence between two ministries. Whatever the reason for the predecessor’s departure—retirement, death, resignation in favor of a new opportunity, or negotiation or termination as a result of deteriorating effectiveness, a deteriorating relationship, or misconduct—the successor was to be selected as soon as possible.

It has now become clear that the absence is in fact a presence, offering unique opportunities for what William Bridges calls “the way through”: “an inner process through which people come to terms with change, as they let go of the way things used to be and reorient themselves to the way things are now.” And, one might add, the way things are becoming.

Following this Preface is a Checklist is “for a minister to be called by the congregation.” The extension of a ministerial call by the entire congregation is the nearly last act in a lengthy and deliberate process that began with the first indications of ministerial departure and concludes with the installation of the settled successor.

Checklists for the relatively brief process of securing “a minister to serve on contract”—an interim or a consulting minister—can be found in the *Interim and Consulting Ministries Handbook*, also online. Interim ministers are transition specialists, whose mission is to guide pastoral-size, mid-size, and larger congregations through a complete transition experience. A congregation hiring an interim minister does so with the understanding that it will go into search for a settled minister in the next year or two. Consulting ministers generally serve smaller, often growth-oriented, congregations. A congregation may also hire a consulting minister immediately following a brief, conflict-free predecessor ministry. Consulting ministers generally serve from year to year, and may later be called. But if you are planning to call a minister soon, this *Settlement Handbook* is your guide.

Checklist—search for a called minister

	<i>Advised Date</i>	<i>Actual Date</i>
Direction-Finding		
1. Board arrange for visits of District Executive (DE), Ministerial Settlement Representative (MSR), and District Compensation Consultant; provide requested information to MSR	Mar-Jun	_____
2. Board plan search committee selection process	Mar-Jun	_____
3. Board adopt search committee budget	Mar-Jun	_____
4. Board conduct congregation's election of search committee	Mar-Jun	_____
Self-Study		
5. Search committee (SC) provide requested information to and meet with MSR (second consultation)	Jun-Sept	_____
6. SC familiarize itself with the Transitions Office website and the Ministerial Settlement System	Jun-Sept	_____
7. SC print out copies of the <i>Settlement Handbook</i> and the <i>Resource Guide</i> for every member	Jun-Sept	_____
8. SC go on facilitated overnight retreat	Jun-Sept	_____
9. SC select chair (and Transitions Office contact), allocate tasks, establish time-line	Jun-Sept	_____
10. Board select negotiating team to recommend ministerial compensation package and draft agreement	Jun-Sept	_____
11. SC gather information by cottage meetings, survey, interviews, etc.	Jun-Sept	_____
12. SC schedule Beyond Categorical Thinking workshop for congregation	Jun-Sept	_____
13. SC compose Congregational Record (CR)	Jun-Sept	_____
14. SC begin compilation of informational packet for exchange with interested ministers	Jun-Sept	_____
15. Negotiating team present recommended compensation package and draft agreement to board	Jun-Sept	_____
Framing the Search		
16. SC set up neutral pulpit arrangements with nearby congregations	Sept-Oct	_____
17. SC create, distribute, and analyze results of congregational survey and other information-gathering	Sept-Oct	_____
18. Board tender approved compensation package and draft agreement to search committee (if a vote by the Congregation is required on the package, allow time for it)	Sept-Oct	_____
19. SC complete online Application for Minister by	Oct. 31	_____
20. SC complete online CR by	Oct. 31	_____
21. SC request MSR to give go-ahead for Transitions to unveil CR; follow up to make sure the unveiling occurs by	Oct. 31	_____
22. SC prepare informational packet, including draft agreement and survey results, and make copies for potential candidates; send copy to MSR for review	Sept-Oct	_____
Open for Business		
23. SC meet with MSR for third consultancy (often by conference call) ideally <i>no later than</i>	Nov. 30	_____

24. SC can request access to Ministerial Records when the following are in order, ideally <i>no later than</i>	Nov. 30	_____
• Survey results, draft agreement, and compensation package reviewed by the Transitions Director		
• Informational packet reviewed by the MSR		
• MSR's third consultancy is imminent		
25. SC call interested ministers, exchange packets with those whose interest it reciprocates	Nov-Jan	_____
26. SC sponsor Beyond Categorical Thinking workshop	Nov-Jan	_____
27. SC receive, circulate, and evaluate ministers' packets, conduct group phone interviews, interview named references	Nov-Jan	_____
28. Transitions make available MRs of additional interested ministers as manifested	Nov-Jan	_____
29. SC select and schedule three or four pre-candidates for pre-candidating weekends including neutral pulpits	Jan 30	_____
30. SC request interpretive file summaries from Transitions	Jan-Feb	_____
31. SC, with the pre-candidates' acknowledgement, interview developed references in congregations in which the pre-candidates have previously served and with previous employers and named references in current congregation	Jan-Feb	_____
Pre-Candidating Weekends		
32. Pre-candidating weekends!	Feb-Mar	_____
Selection		
33. SC decide on proposed candidate and make offer contingent on satisfactory criminal record background check and interviews of developed references in current congregation/employment <i>no earlier than</i>	March 15	_____
34. SC, with the proposed candidate's acknowledgement, interview developed references in current congregation or employment	Mar-Apr	_____
35. SC conduct criminal record background check on proposed candidate	Mar-Apr	_____
36. Negotiating team conclude ministry agreement with candidate, including compensation matters, subject if necessary to contingencies in step 33	Mar-Apr	_____
37. SC conclude background check and reference interviews	Mar-Apr	_____
38. Board and candidate execute ministry agreement subject to extension of call by congregation and acceptance by candidate	Mar-Apr	_____
39. Board announces candidacy	Mar-Apr	_____
Candidating Week		
40. Congregation extends call and minister accepts	Apr-May	_____
41. SC submits Notice of Call to Transitions	Apr-May	_____

Introduction—the ministerial call

No choice is more important to the future of a Unitarian Universalist congregation than its call of a minister. A thorough, uncorrupted, and mutually respectful search process is the essential first step in the hoped-for partnership of lay and ordained leaders. For both minister and congregation, the process is strenuous, exciting, and informative. It can also be frustrating and discouraging. But generations of lay leaders and ministers testify that such a process, followed well, richly repays the time and effort it requires.

Crucial to the quality of the outcome is the quality of the ministerial search committee. Selection is all!—or almost all. This group must invest hundreds of hours in getting to know each other, the congregation, and their ministerial prospects well, so they can make the best choice not for themselves as individuals but for all. No wonder search committee members often become lifelong friends!

Search committees do not simply choose among ministers; they engage with ministers in thoughtful, mutual exploration. For ministry to be effective, both the congregation and the minister must sense a “call,” a felt conviction that this match is right for both. Ministers and search committees are ideally not adversaries in this quest, but partners.

A third partner is the Unitarian Universalist Association. Knowing the importance of effective ministry for the health of our congregations, the UUA supports the search process through the Transitions Office in Ministry and Professional Leadership. The Office serves both ministers and congregations by providing information, counsel, structure, and resources. Its goal is to promote excellence in ministry by helping ministers and search committees to function at their best as they choose one another.

This *Handbook* outlines the procedures recommended by the Transitions Office. These procedures reflect the experience of ministers and search committees over many years, and they also incorporate new ways of gathering and distributing information. One of the two major goals is to provide committees and ministers alike with the greatest possible flexibility and range of choice, and with access to as much useful information as possible.

The second goal, receiving new emphasis in this edition, is to provide congregations with the resources they need to assure themselves, to the greatest extent possible, that the ministers they call are the persons they say they are. Congregational safety, alas, is a topic of contemporary importance.

The third goal is to encourage procedures that are fair, thorough, nondiscriminatory, and efficient. Well used, these procedures provide the search committee with a full range of potential candidates, and with full information about each minister’s experience and qualifications. They provide ministers with notice of opportunities for ministry and extensive information about congregations seeking ministers. And they protect ministers from violating the Code of Professional Practice of the UU Ministers Association, and committees from committing inadvertent slights that may result in losing a potential candidate. Finally, these procedures lay the foundation for a happy, fruitful, and trustworthy partnership between a united congregation and its chosen minister.

Going On Line

Getting Started—using the Settlement System for the first time

- Go to <http://www2.uua.org/password.asp>
Search committees please note—Only the committee member responsible for communicating with the Transitions Office should register the committee. And only one registration per committee, please!
- On the registration screen, register as a congregation or as a minister. Complete the registration information and create your own username and password: no more than eight letters and/or numbers each, and only one username and password per committee or minister. Save them! You can't re-enter without them.
- You should now have arrived at the menu screen. Explore!
Search committees—Share your username and password with all members of your committee and, when you have completed your Application for Minister and Congregational Record, with your Ministerial Settlement Representative (MSR) for review. Your MSR will let the Transitions Office know when your CR is ready for ministerial access (“unveiling”).
Ministers—If you are not ready to go into search, but merely wish to browse among the CRs, feel free. It is wise, however, to keep your Ministerial Record up to date.
- **Note:** If, after you complete the registration screen, the screen merely reappears, the likelihood is that either your username or your password is already in use. Please re-register, avoiding double u's, and select a new username and password. Again—save them!

Re-entering

Go to the Settlement System portal on the UU web page— <http://www2.uua.org/>

- Enter your username and password
- You should now arrive at the menu screen.

Important!

When completing your Record . . .

- Compose your responses to the various CR or MR questions on your word processing software, then cut-and-paste to the appropriate sections of the CR or MR.
- Cut-and-paste just one or two sections at a time, going down to the bottom of the entry page and clicking “submit” before entering more material.
- Every time you log in, you have the opportunity to revise your responses. After submitting changes, go back in to make sure they "stuck."

*If you suspect that an earlier Congregational or Ministerial Record is registered in the name of your congregation or in your name as minister, contact the Transitions Office for assistance in locating it.

Recommended procedures for congregations

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If the new called ministry is to be successful, plenty of time must be allocated both to the congregation's transition and to the search process. After a minister's departure, some congregations may indeed be ready to move right into the search for a new minister, able, with the guidance of an effective interim minister, to make the turn from the previous relationship to a new one within one year. Other congregations, however, may have faced a variety of challenges, requiring a mature consideration of the identity and direction of the congregation, and making it advisable to extend the interim period before going into search. An extended period of transition is often advisable. Congregations planning an interim period of longer than a year should defer selecting a search committee until eighteen months or so before expecting the minister's arrival.

Ministerial succession

According to the Unitarian Universalist Ministers Association Guidelines,

“The minister can (and often should) serve as a consultant to the Board in preparation for vacancy in the ministry, helping members to understand candidating and settlement procedures. However—and we say this in the strongest terms possible—once a move is announced, the minister must take no leadership role in the planning and development of program or policy for the period after his or her departure.

“It is unethical for a minister to suggest any one or several candidates to the society to serve as successor or interim.”

Departing ministers and their spouse or partner are strongly advised to play no part in congregational life during an interim ministry. Thereafter, the relations among departed minister, congregation, and called successor deserve the lay leadership's most careful attention. See the Transitions Office publication, *Succession Following Meritorious Ministry*.

Whether the issue is filling a ministerial vacancy or offering a new ministerial position, a congregation and its governing board should first seek the counsel of the UUA District Executive and the Transitions Office. Most congregations in the search process are replacing a minister who has resigned, retired, or died. Others are seeking a minister for the first time, or adding a second or third minister to the staff. Each situation is unique, and a wise governing board¹ will seek the advice of the District Executive² as early as possible in its planning. The DE is an experienced consultant who knows how to secure the benefits of UUA services for congregations. Soon after a minister's departure is announced, the DE or the district transition team will wish to conduct a transition interview with the lay leadership. The resulting interview report assists the DE and the Transitions Office in delivering needed services.

The services of the Transitions Office are most useful to a congregation once the decision to search for a minister has been made. This *Settlement Handbook* will answer a great many questions, and should be consulted early and often. However, the Transitions Director welcomes inquiries at all stages of the process.

A congregation will need to adjust its search to the position to be filled, often a function of its size.

¹ Variously called Board of Trustees, Board of Directors, Standing Committee, Parish Committee, and other names.

² Known also as District Staff, Consultant, or Facilitator. In some districts, aspects of the DE's work are shared with teams of trained volunteers.

Larger congregation ministry

In view of the critical importance of a well-functioning, mutually cordial ministry team, the search for a new minister in larger congregations offers special complexities, depending on the position to be filled and the accountability relationships anticipated among the ministers. An assistant minister is generally supervised by a more senior minister and hired by the board rather than called by the congregation. Thus wide congregational involvement in the search—surveys, group meetings, and candidating week—is inconsistent with the relationships to come. This minister is best sought by a search committee made up of board members, chairs of committees responsible for areas in which the minister will concentrate, and the supervising minister. Congregations searching for an assistant minister are referred to “Search for Assistant Minister: Time and Task Checklist,” in the *Resource Guide for Ministerial Search Committees*.

Ministers of Religious Education and associate ministers are generally called by the congregation. Generally in such searches, the parish minister is in close consultation with the search committee, with full access to Ministerial Records and packets and limited presence in sensitive committee deliberations, and is granted a veto over ministerial pre-candidates.

A parish, senior, or lead minister in a multi-staff setting generally carries the major worship duties, works in partnership with the board in guiding the development of the institutional church, and functions as chief of staff. The duties of chief of staff, and thus of the accountability relationships of other ministers on staff, vary. During the search for a parish minister, an associate minister or MRE on staff should have a closely consultative role with the search committee. An assistant minister, religious educator, administrator, and church musician, where those positions are professional, should also be consulted. Committees should interview these ministers and staff members before beginning the search, provide them with ample meeting time with the ministerial pre-candidates during pre-candidating weekends (which may need to be extended for this purpose), and interview them afterwards. Pre-candidates’ Ministerial Records and packets are generally not to be shared until the candidate has been selected. However, pre-candidates and ministers on staff may wish to engage in an MR- and packet exchange of their own. No minister or staff member should be made privy to doubts or concerns search committee members may have about a minister who may subsequently become the parish minister. Time for team-building during candidating week is a must!

Small congregation ministry

A congregation seeking to fill a called ministerial position less than full-time should be clear that it is searching for a minister who will serve part-time (at least for the foreseeable future), and not for a “part-time minister.” The call is to the congregation’s ministry, not to its part-time ministry. As the congregation grows and its stewardship improves, and it is able to fund full-time ministry, the minister will assume wider responsibilities as a matter of course. One caveat: A ministry of less than full-time should feature a less-than-full preaching schedule, lest the ministry become merely pulpit supply.

Co-ministry

Co-ministers, usually but not always spouses or partners, may occupy any one or more than one of the ministry positions described above. In a co-ministry agreement the resignation or termination of one of the co-ministers necessitates the departure of the other. Search committees can anticipate receiving MRs from co-ministry teams both to share a parish ministry position and to serve together in more than one position.

Ministers not in fellowship

Member congregations of the Unitarian Universalist Association are of course free to call and to ordain to their ministry any person they choose, including persons not in fellowship with the UUA. The UUA does not withhold services or otherwise discriminate against congregations that do so. The Transitions Office is not, however, in a position to assist congregations in determining the fitness for ministry of such persons. Congregations considering this most unusual step should plan to consider the following questions at some length:

- To what degree is the person under consideration familiar with liberal religion, its history, its theologies, and its polity?
- Will the person under consideration be capable of holding high the standard of liberal religion in interfaith circles and in the public square?
- To what degree is the person under consideration committed to pursuing UU fellowship, independent of the present position?
- To what extent is it about money—obtaining ministry services at a discount for the congregation, and getting paid for what looks like enjoyable work for the person under consideration?

The Transitions Office’s Ministerial Settlement Representative (MSR) then makes a personal visit as the first of three consultations, meeting both with the congregation for the purpose of describing the recommended search process and the qualities of an effective search committee, and with the board to outline its responsibilities in the search process. Once the congregation has decided to seek a minister and the DE has completed the transition interview, the congregation is ready to be in touch with the Ministerial Settlement Representative (MSR). Jointly nominated by the District board and the Ministers Association chapter, and appointed and trained by the Transitions Director, the MSR represents the Transitions Office to the congregation, assists the congregation in understanding the recommended search process, and guides the search committee toward maximum effectiveness. The MSR does not recommend or comment on prospective candidates. A congregation needing further assistance or unsatisfied with the counsel the MSR is offering should contact the Transitions Director.

In this first consultation, some MSRs prefer to address the congregation in an “open forum,” others in the “sermon slot” on a Sunday morning. Minister-MSRs who fill the pulpit should be offered an honorarium.

Selecting the search committee

The congregation's bylaws may specify how to select a ministerial search committee. If not, one good way is to have a nominating committee (regular or special) propose a single slate of seven to be elected by the congregation. A single slate ensures a representative committee.

However chosen, all members of the search committee should be:

- Known and respected by others in the congregation
- More strongly committed to the congregation as a whole than to any subgroup
- Well informed about the demands and time requirements of search committee membership. Members should promise to attend every meeting, and to give about 250-400 hours over the coming year
- Balanced by sex, age, interests, and tenure of membership to reflect the diversity of the congregation. Major areas of church life such as religious education, social action, property management, finance, and music should be represented by participants, not partisans

- Balanced by attributes: organizational ability, broad theological awareness, computer skills
- Not paid members of the church staff, except for a senior minister who will be supervising the minister to be called
- Pledged to conduct a search that is fair and nondiscriminatory with respect to race, color, disability, sex, sexual orientation, age, and national origin
- Committed to maintain confidentiality and to seek consensus
- Capable of both self-assertion and compromise
- Not prone to extreme reactions to ministers. The previous ministers' strongest supporters or opponents are rarely the best choice
- Well suited to teamwork: a search committee is no place for Lone Rangers!

It is easier to achieve these goals by active recruiting than by passively accepting volunteers. A seat on the committee is not the way to get a newcomer more involved, or to appease a chronic malcontent. Alternate and ex-officio membership are discouraged; each search committee member should participate fully. If one or two members must resign after the committee has begun it is usually best not to replace them. During the search, members should be released from other major duties in the congregation. One member (normally the chair) should be assigned as a board liaison, but should not be a board member.

While the search committee is generally charged by the congregation with carrying out a search and recommending a candidate, it is up to the board to make adequate provisions for the committee to do its work. The board's responsibilities include: arranging for the empanelling of the search committee, budgeting for the committee's work and the expenses of the transition, and related financial matters.

Search committee budget

The search committee needs a budget to work effectively. The congregation will not want to limit the selection of ministers or to assess them superficially to save a little money. The recommended budget for a search committee is \$8,000 or 20 percent of the projected salary (plus housing), whichever is greater. The cost of clerical support, which fortunate committees find invaluable, is extra. If the next minister stays with the congregation for seven years, this amounts to just over 2 percent of its direct investment that period.

The search committee's budget should cover the following:

- A facilitator and site for the search committee retreat
- Printing and materials for the informational packet
- Committee members' expenses, including telephone, mileage to pre-candidating sites, meals, and lodging as required
- Postage and stationery for correspondence and packet mailing
- Pre-candidates' expenses, including travel, meals, and lodging (typically there are three or four pre-candidates). Increasingly, search committees invite the candidate's spouse or partner for the pre-candidating weekend
- Candidate's expenses, including travel, meals, and lodging during candidating week
- One visit for the candidate's immediate family, either for candidating week or at some other time

Transition expenses

The board also needs to plan for several other expenses of the transition, including compensation and moving expenses for an interim minister. In addition, it needs to plan for:

- Moving expenses for the successor settled minister. It is the congregation's responsibility to cover the cost of a professional move for the minister's immediate family and household goods. Additional costs, such as packing, temporary housing, short-term loans, house-hunting trips, and mortgage assistance, are also sometimes negotiated. Fourteen percent of salary (plus housing) is a good benchmark for budgeting.
- The installation of the new minister, which normally includes speakers from out of town, special music, and a reception. This normally happens during the first year after settlement. The cost might be \$500 for a small church up to \$2,500 or more for a large one.

Bookkeeping

The congregation's treasurer should give preliminary consideration to setting up the search committee's books so that the identities of ministerial pre-candidates are screened from all but the search committee itself. Some congregations establish a committee checking account into which the committee's allowance is deposited, with all receipts conserved for a post-search audit by the congregation's treasurer. Others add a two-signature requirement. Still other committees make all payments by personal credit card, with reimbursement authorized by the congregation's treasurer on the basis of receipts from which, as in the case of airline tickets, ministerial pre-candidates' names have been removed.

The District Compensation Consultant visits to assist the board and other leadership in reviewing the compensation plan for the minister(s) and church staff, and in adopting a financial package for the position to be filled.

The financial package the board provides for the new minister will have a direct bearing on the pool of ministers who may wish to be considered by the search committee. It will bear no less directly on the resources available for the compensation of other church staff. Detailed and up-to-date recommendations about compensation are to be found online on the UUA website. The Compensation Calculator on the Transitions webpage gives comprehensive guidance to a congregation wishing to offer UUA-recommended compensation.

Given the importance Unitarian Universalists place on acting justly in our congregations and in the world, the UUA and each district provide the Compensation Consultant program. The Compensation Consultant is equipped to assist the board, search committee, and personnel committee if desired in considering the compensation not only of the minister but of all church staff. Governing boards are strongly encouraged to consult with the Compensation Consultant before authorizing an Application for Minister to the Transitions Office. The Compensation Consultant can point out a number of additional resources published by the UUA Church Staff Finances Office.

Another resource is information about comparable positions in the local community. Ministers and rabbis in congregations of similar size and economic status, school principals and teachers, college faculty, and trade association executives usually will provide data on salary and benefits. A further consideration is the congregation members' own economic position. In our culture, money talks. If the congregation wants its minister to be respected as a leader, it will want to pay what most of the members would expect to be paid at a comparable career stage. It is worth doing some research to set a salary with which the congregation and the minister will both feel comfortable.

The congregation meets to elect the search committee. As with any other employment situation, the higher the compensation offered, the wider the field of candidates from which to choose.

As it takes the measure of ministers indicating interest in being considered, the search committee may become a strong advocate for an increase in the congregation's offer.

Self-Study

The second MSR consultation is with the newly empanelled search committee for the purpose of organization and start-up. Although the committee may have many concrete tasks to complete, there is no task more important than getting well acquainted and building a strong team. Every year a committee or two “crashes” as conflicts surface in the course of interviewing candidates. Often, in such cases, committee members had been vaguely uneasy about early signs of conflict, but decided to skip the team-building phase. When conflict surfaces, this skipped step is paid for sevenfold.

The search committee begins its team-building by going on retreat. Search committees take on a responsibility nothing less than awesome. If the committee is going to perform its task—the recommendation and presentation to the congregation of the best minister for the congregation's future—successfully, the committee must strive to become a seven-person reproduction-in-miniature of the entire congregation. To begin this process, a one- or two-day retreat away from home and church is not merely desirable: it is necessary. The committee's budget should enable it to engage an effective retreat facilitator from outside the congregation. The MSR or the DE may be able to recommend one. The facilitator should be charged, first, with helping the group become deeply acquainted and, second, with creating a safe place in which candid talk about attitudes, values, and biases can take place. It is crucial that the group get to the feeling level during a good portion of the retreat. If a committee culture of mere task-orientation is allowed to form now, the committee will be ill-equipped to face the taxing decisions that lie ahead.

The committee analyzes and allocates responsibility for all that must be accomplished, decides upon its procedures to safeguard the identities of ministers it will consider, develops decision-making guidelines, and begins its work.

Roles to fill

The committee should assign specific jobs to each member. This is not a task to be done in haste; these decisions are hard to undo, and all of them can wait until the second day of a retreat. Here is a list of roles to adapt to each committee's needs and talents:

- **Chair:** The chair is responsible for the care and feeding of the committee, and for holding the vision. The chair needs to enjoy keeping a finger on the pulse of everything and to be easy to reach, not terrified by conflict, and able to use tough love if necessary. The chair convenes meetings and is the primary communicator with the board, the Transitions Office, the MSR, and the District Executive
- **Packet Editor and Distributor:** The editor needs to have an artistic flair, love compiling material, and be confident of creating a fair and attractive picture of the congregation. In distribution mode, the editor sends copies of the packet to prospective candidates, receives and renews returned ones, and receives candidates' packets and creates the means by which all committee members see them in a timely fashion.
- **Arranger:** The arranger sets up preaching dates in area churches for pre-candidates and sees that everyone has all the information they need. Flexibility and creativity are required, since the arrangements are for a minister unknown with a church not known whose administrator (also not known) wants to get the Sunday morning schedule squared away before the details can be known. The arranger also looks to the care and comfort of the pre-candidates (and later the candidate) from the moment they arrive until they leave. Who will meet them? Where will they stay? Where/when will they eat? Who will drive them where? What will a

tour include? No detail is too small to influence a candidate's first impression of the congregation.

- **Reference Checker:** The checker designs some type of instrument to chart the information the committee wants about each candidate and devises a way to communicate findings to the committee.
- **Secretary:** The secretary communicates with the prospective candidates, keeping them informed of the committee's process. The secretary is also the primary communicator to the congregation of the committee's progress, by a regular newsletter column, a well-designed and often-updated bulletin board, and other means. The secretary also keeps detailed notes and minutes of committee meetings. The amount of communication needed is inestimable; the secretary needs to like doing it.
- **Survey coordinator:** The surveyor needs to have a passion for learning who the congregation is and what their wants/needs/hopes/desires are, and a vision of how to do it. The surveyor will create the survey instrument and survey events capable of eliciting thoughtful, reflective, and copious response in a form that will effectively communicate that response to the prospective candidates.
- **Treasurer:** The treasurer creates the budget, keeps expenses on track, and makes sure committee members account for expenses and are reimbursed in a timely fashion. The treasurer reports to the Finance Committee, but in such a way that the identities of the ministers under consideration are not revealed. The treasurer often heads up the negotiating team.

Confidentiality

Confidentiality is not secrecy. The committee must publicize the process it is following and how far along it is at every point. At the same time, the committee must keep confidential both the names and the locations of the ministers under consideration and the details of committee business. There are several reasons for the rule of confidentiality:

- * Ministers settled in a congregation may not have told their present parishioners that they are contemplating a move. These parishioners are entitled to hear the news from their own minister at the appropriate time. To "leak" a minister's name can undermine his or her ability to serve the present congregation, and will almost certainly damage a committee's chances of attracting that potential candidate.
- * When the identities of unsuccessful applicants are known, it heightens the competitive aspect of the search process. This hurts collegial feeling among ministers and (when neighboring congregations compete for the same minister) also can create hard feelings among congregations.
- * It is harder to resolve differences among the members of a search committee when factions of the congregation are looking over its shoulders. It is better to resolve differences in private.

The congregation usually takes the search committee's lead on confidentiality. If committee members take their obligations seriously and are consistent in keeping confidential matters to themselves, others will not pry. The retreat is the time to set the tone on confidentiality, and to agree on how to deal with committee spouses, neutral pulpit sites, and congregation members who ask questions.

When the committee begins exchanging packets and other paraphernalia of the search process, it will discover that keeping confidences is not merely a personal, but also a logistical

challenge. A locked room in the church to which only search committee members have keys can be a great help.

Deciding how to decide

At the retreat or early meetings, the committee should think ahead to some of the decisions that will have to be made. Consensus is the goal, but what if one member feels strongly that the majority of the committee has made the wrong choice? If two do? How many members will it take to reject a minister on the basis of the packet? To put a minister "on hold" while considering others? To invite a minister for a pre-candidating interview? To reject a minister? Some committees give each member an effective veto at every point; until pre-candidating weekend a majority is probably the better course. Each committee needs to make its own ground rules and can do so most easily before it begins considering actual ministers.

At early meetings, the committee needs to make definite plans for circulating ministers' packets, conducting pre-candidating interviews, and scheduling neutral pulpits. It is not too soon to start contacting nearby congregations for neutral pulpit sites, because schedules fill up early.

The governing board appoints a negotiating team to prepare a draft of the ministry agreement into which the congregation and minister will eventually enter. Shortly after the search committee is selected, the board should appoint a negotiating team, consisting of no more than three persons, including at least one search committee member and one board member. The team's purpose is to develop for board approval a draft ministry agreement that reflects the relationship the congregation hopes to have with the minister it calls, and then to negotiate it with the ministerial candidate. The team should meet with the board several times to achieve a clear understanding on the limits of the salary and housing amount set by the board and the plan for negotiating a final agreement.

Subsequent to the second consultation, the MSR may wish to meet briefly with the negotiating team. To maintain the integrity of the search committee's process, negotiating team members who are not also on the search committee should not attend the MSR's consultation with the committee.

The draft agreement may be detailed or highly general, a multi-page, contract-like document or a two-page letter. A detailed discussion and examples can be found in *Joint Recommendations on Agreements between Ministers and Congregations*. The board, for its part, should be prepared to support any ministry agreement negotiated within its understanding with the negotiating team. The draft agreement should be included in the informational packet prepared by the search committee and discussed with each pre-candidate, with notes made of the response of each. It is not necessary at this point to resolve any differences, only to acknowledge that they exist and will need to be resolved if this person is chosen as the candidate. Members of the negotiating team who are not on the search committee should not meet with the pre-candidates.

The search committee conducts cottage meetings, focus groups, and a survey of the congregation to ascertain its makeup, needs, and wishes. The purpose of the congregational survey is to offer every member of the congregation the chance to express needs and wishes for the congregation's future ministry. Survey data also lend themselves to quantitative analysis and can give a factual basis to support or correct vague impressions of the congregation's make-up or direction. Helpful guidance can be found in the on-line document, "Conducting an Effective Ministerial Search Survey," by Dr. Paul Riedesel, a member of First Universalist Church of Minneapolis. A sample survey can be found in the *Resource Guide for Ministerial Search Committees*. Many committees are finding the on-line survey engine, Survey Monkey, to make this formidable job more productive and more fun..

At the same time, it is important to keep in mind the limitations of a survey. Although search committee surveys often get a good response, it is rare that more than two-thirds of the surveys are returned, especially in larger congregations. (If the return rate falls below 60 percent, there is cause for

concern: At best, communications may need improvement; at worst, the congregation is not invested in the search.) It is important to check against the directory how well the responses represent the total congregation in age, sex, interests, and length of membership.

Another limitation of the survey is the degree to which it often reflects the congregation's feelings about the previous minister. People who liked the last minister sometimes want his or her twin. Other people's first wish is for the next minister to be strong where the last was weak, while taking the last minister's strengths for granted. This rear-view outlook is normal, but it is the search committee's job to move beyond the past to think about the congregation's future.

But a head-count only tells part of the story. A ministry can be destroyed by a small but passionate group. On the other hand, successful ministers often differ from large groups in the congregation in theology, political persuasion, or preferred worship style. Much depends on the interpersonal skills on both sides.

Perhaps the most critical dimension of a survey is the context in which the instrument is completed. A survey received in the mail and completed alone is likely to record the response of an "ionic individual": an unconnected person thinking of his or her needs and preferences without reference to those of others. A survey completed as a part of a small group meeting following spirited and reflective interchange is likely to record the responses of "embedduals": people who are aware that the needs and preferences of others are no less important than their own. Thus the committee would do well to give members of the congregation the opportunity to voice opinions on the ministerial search in company with others, in committee meetings, neighborhood potlucks, randomly selected "focus groups," and groups gathered on the basis of common interests.

One committee found that in its cottage meetings, only three questions were necessary: "How would you describe this congregation to its prospective ministers? To prospective members? To a close, non-member friend?" Another committee used only two: "Looking back, after our minister has been with us a year, what will be your measures of success? What achievements will make you say you're glad the minister is among you?" Still a third committee found that an additional round of group meetings after the committee had published its congregational and ministerial profiles provided them with an invaluable mid-course correction.

For all its limitations, the survey is a basic source of information on the present composition of the congregation and its preferences. It is up to the committee to interpret the bearing of this information on the most effective kind of minister for the congregation in the future.

As it proceeds, the committee engages in dialogue with the congregation, reaching out for additional insight and sharing its own developing perspective, all the while keeping the congregation fully apprised of its progress. By the time the search committee interviews pre-candidates, its members will have come to know a great deal about their congregation. The knowledge they earn will be most helpful in discerning the best congregation-minister match, and will make committee members more effective members of the congregation in the future.

Strategic interviews

Early in the self-study process members of the search committee should be assigned to interview key persons and report on what they learn. Lay leaders who were not selected for the search committee will be reassured if they are interviewed. This includes those leaders in every congregation who may not hold office at the moment but whose counsel is sought and respected when major decisions are made.

Paid staff members, especially those who will continue with the new minister, should also be interviewed. Occasionally strong feelings will be voiced. The committee will likely not be

able to accommodate all of their wishes, but one of its goals should be to create an effective and harmonious staff team. It is important to ask how ongoing staff expect to relate to the new minister in terms of supervision, communication, and support, and to clarify any discrepancies between their expectations and the board's.

A committee can learn a surprising amount about the congregation by asking key outsiders for their observations. The District Executive is one obvious example. Others might be local clergy and other leaders who can tell how the congregation is viewed in the community. It may have a better reputation than assumed!

“Beyond Categorical Thinking” program

The search process is necessarily refined, necessitating discriminations both deliberate and delicate. Inadvertently unjust discrimination is always possible. A minister's age, physical ability, race, gender, and sexual orientation indicate little about the minister's capacities or leadership style, and little about the probability of a good minister-congregation match. A search committee does well to consider the risks of discrimination faced by the congregation they represent. A discrimination-free search not only reflects the commitment of UU congregations to justice and diversity; it also assures the widest possible field of ministers from which to choose.

“Beyond Categorical Thinking” is a weekend program designed to promote inclusive thinking and to help prevent unintended discrimination in the ministerial search process. The weekend includes a Sunday morning worship service and a three-hour workshop. The workshop is designed to help participants come to terms with their own, often involuntary “categorical thinking.” The program is conducted by a team of two trained Beyond Categorical Thinking leaders who themselves represent some of the diversity for which UU congregations advocate. These individuals (ministers, seminary students, lay persons, and UUA staff) have examined their own fears and prejudices, and have learned effective methods to address these fears in themselves and in our Unitarian Universalist congregations.

Travel costs for the team are paid by the UUA; each congregation contributes \$250 towards the honoraria paid to team members. Contact the UUA's Identity-Based Ministry Staff Group for additional information and to schedule the program.

Communications

The rule of confidentiality does not prevent a committee from keeping the congregation posted on its progress. Far from it. The congregation is entitled to understand the search process and to know how the committee is coming along. In the *Resource Guide* are some sample newsletter columns, Sunday announcements, and ideas for a poster to help the committee keep the congregation informed.

The committee will want to explain the search process and the rationale behind it. Materials from this handbook, from the visits of the MSR, and from the Transitions Director's annual “search committee luncheon” at General Assembly may be good sources for newsletter columns. Some congregations wonder why the search committee presents only one recommended candidate. The committee should be clear that its task is to be both thorough and sensitive to the diverse wishes in the congregation, seeking consensus on one candidate whom the whole congregation can support.

While the committee will wish to publish the schedule it expects to follow, it should avoid committing itself so strongly to a deadline that it feels pressure to select a candidate with whom it is uncomfortable.

The role of the interim minister in the search process

The essence of the interim year is transition, and with transition comes change. It is crucial to the success of the next called ministry that the ministerial search committee represent the congregation as it is becoming rather than the congregation as it was. Thus the importance to the search committee of the interim minister's insight into the congregation, and of full and ongoing communication between the committee and the interim minister. Interim ministers will be eager to assist the search committee by:

- assisting the MSR in arranging an effective forum for presentation.
- bringing congregational concerns to the notice of the search committee.
- coaching the search committee on communications with the congregation.
- offering response to the committee's Congregational Record.
- writing a "Letter from the Interim Minister" for the committee's packet.
- participating in a mock interview with the search committee or acting as process observer in such an interview with a neighboring minister.
- witnessing for a realistic ministerial agreement and fair compensation.

Interim ministers will not review Ministerial Records, ministers' packets, or the committee's selection of pre-candidates, nor will they respond to committee questions about potential candidates.

It is of the essence of an interim minister's work that a congregation's vision of the possibilities of ministry be expanded, and its understanding of the minister-congregation relationship deepened. Even if the interim minister were never to bring up these topics explicitly—a most unlikely occurrence!—the interim's presence alone would bring them to the surface. Thus the interim minister will keep the ministerial pot stirring, more with the congregation as a whole than with the committee in particular.

As candidating week approaches, the interim minister will wish to preach on the nature and role of the ministry. And when that week arrives, the interim will withdraw, available to the congregation for pastoral emergencies but otherwise out of sight.

Framing the Search

On the basis of the information and insight it gathers, the committee completes the Application for Minister and Congregational Record (CR) and submits them on-line to the Transitions Office. Upon receiving notice from the MSR that the CR is complete, the Transitions Office "unveils" the CR for viewing by all UU ministers. The purpose of the Application (selection #3, "Apply for a called Minister," on the Settlement System menu) is to give official notice of the date the position is open and the compensation package offered. The purpose of the Congregational Record is threefold: to assist the search committee in becoming expert interpreters of the congregation, to encourage sensitive yet candid disclosure of congregational strengths, challenges, and continuing issues, and to provide the opportunity for "marketing" the position offered. For easy review, the questions on the congregational record are also printed in the *Resource Guide for Ministerial Search Committees*.

Much of the basic information needed to complete the Congregational Record should be in the church office's file cabinets and in the archives. Unfortunately, too many congregations' records are scattered in the homes of former officers and other leaders. The committee can perform a great service for the congregation simply by collecting these in a safe place before they are lost. The committee should also feel free to ask the church historian, long-time members, and past and present church treasurers for their assistance. Information it seeks may be also included in an "Active Society Report,"

available on request from the UUA Annual Program Fund, which maintains records of reports submitted by congregations over the years.

In completing the interpretive sections, however, the committee should do its work alone. No one is better situated than the committee to provide potential ministerial candidates with essential factual and interpretive information about the congregation. It has been found that a secondary benefit of the CR completion process is significant committee team-building.

In reconstructing the historical record of membership, attendance, pledging, operating budgets, capital expenditures, and borrowing in five-year intervals from 1980 at the latest, information will undoubtedly emerge that corrects some commonly held notions about the congregation's history and present strengths. Committees may wish to share these discoveries with the congregation through the newsletter.

The Congregational Record is a big job to complete. Most committees warm to the task, and find the process stimulating. Ministers find the information invaluable. Ministers may read CRs for a host of reasons: they may be interested in a particular congregation, they may be considering entering the search process, or they may simply be browsing. Whatever their motive, ministers visiting the CR will be looking both for factual information honestly presented, and for thoughtful interpretation rather than advertisement. They are looking for a congregation with which to do ministry, not for blue sky. The CR is the search committee's best opportunity to attract ministers' interest. It is largely on the basis of the CR that ministers will decide their degree of interest in the congregation.

Congregational and Ministerial Profiles

The conclusive result of the search committee's analytical work on the congregation's needs in its new minister is a pair of statements, one a profile of the congregation, the other a profile of the hoped-for minister, included in the CR. Of one or at most two pages each, the profiles draw on information the committee has gathered in its research, survey, meetings, and interviews, but they are more than summaries. They are statements of the conclusions the committee has drawn about the identity and needs of the congregation on the one hand, and the skills and qualities that are most important in the next minister on the other. The profiles should be published for comment by members of the congregation.

It would be easy, in the profile of the congregation, merely to summarize the demographics of the survey. But interpretation rather than repetition is called for. Who *are* these people? What is their church to them? What are their hopes for it, and for its role in their lives? What are the major tasks confronting it in the coming years? Does it need to heal after a division? Is it eager to grow? Are there hopes for a more spiritual Sunday service? Is there a building project in the works? A more effective and cohesive staff team? Different answers will appeal to different ministers. Examples of effective congregational profiles are to be found in the *Resource Guide*.

It is similarly tempting, in the profile of the hoped-for minister, simply to list all the virtues of a perfect minister and leave it at that. But the statement can only be helpful if it gives guidance about trade-offs. What if the congregation has to choose between a scholarly preacher who is a bit distant and a weak preacher who is an inviting counselor? To what extent does the congregation depend on the minister to hold the office operation together? Are there specific expectations as to lay participation in worship, the minister's involvement with children and youth, or home visitation? It is just as important to be clear about what the minister need not be or do as about what is required. See the *Resource Guide* for examples.

The ministerial profile is the place to state any additional requirements the committee may wish to impose, such as a certain amount or type of experience. Flexibility is called for; an exceptional minister who does not meet rigid criteria might still be a good match. The

Transitions Office will of course not collude with any committee's attempts to restrict its position by race, disability, sex, sexual orientation, age, or national origin.

Writing the profiles is a difficult assignment. A good job will probably require several drafts of each and several meetings. Because the profiles are the primary reference documents the search committee will use as it reviews MRs, ministers' packets, and pre-candidates, they are worth all the very considerable trouble it takes to get them right. If the committee cannot read them with a sense of "aha!", there is more work yet to do.

Unveiling

Once a search committee's Application and CR are complete, the committee should give its username and password to the MSR for a document review. The MSR will let the Transitions Office know when the CR is ready for ministerial access ("unveiling").

The search committee also prepares an informational packet, including the draft ministry agreement, to exchange with prospective candidates. The information packet a committee sends to prospective candidates is no doubt one of several they will receive, so the congregation must be presented well. The importance of a well-presented packet cannot be overemphasized. Prospective candidates will almost certainly receive more than one, and make irreversible judgments based on them. A skimpy packet suggests a lazy, low-energy congregation. An attractive packet speaks of skillful members who are proud of their church. A thorough, honest presentation of the facts lets ministers know that the congregation is willing to face and solve its problems as well as to boast of its strengths. A slick, artificial-looking packet conveys the impression that a congregation cares more about surface appearances than about spiritual depth. The MSR should review the packet before it is considered ready to be sent out.

If the packet is printed, five to ten packets are needed initially. A good plan is to make at least a dozen prints and photocopies, then buy expensive items like notebooks as needed. It is worth the time and cost to make sure each packet sent out is in "new" condition. An increasing number of congregations compose and distribute their packet either online or by DVD. In any case, the following items should be included:

- * An introductory letter from the search committee, with a photo and personal information about each member
- * Welcoming letters from the chair of the governing board, the District Executive, the interim minister, and the president of the UUMA chapter
- * The completed Congregational Record
- * Results of the congregational survey
- * The draft ministerial agreement prepared by the Negotiating Committee, including proposed ministerial compensation, highlighting any contract provisions that are either unusual or especially important to the congregation
- * Pictures of the church facility, including the worship space, minister's study, and parsonage if any
- * A history of the congregation, with dates. Ministers will pay particular attention to relations with past ministers
- * The current operating budget, plus the actual results of the most recently completed fiscal year
- * A report of any current capital spending
- * A current balance sheet showing all property, endowments, and debt
- * The bylaws

- * The most recent religious education prospectus
- * Recent newsletters
- * Orders of worship for both “regular” and special services, including some from *before* the interim minister arrived
- * The most recent annual report
- * Information about the community. Chambers of Commerce often supply materials from which to choose

A wise committee will recognize that the cost of an account with a continental express firm, for its own use and the use of ministers with whom it is exchanging packets, will repay itself in time and grief saved in “waiting for the mail.”

Open for Business

In the third and final MSR consultation, usually by phone, the MSR and the committee review procedures for the thorough consideration of potential candidates. The search committee is ready to considering actual flesh-and-blood ministers when

- the survey results, draft agreement, and compensation package have been reviewed by the Transitions Director
- the informational packet has been reviewed by the MSR
- the MSR's third consultancy is imminent

The MSR's third and final consultation occurs at this point. Once a date for this consultation is set, the MSR should so notify the Transitions Office. The Ministerial Record of every minister who has indicated interest in being considered by the committee will be made available on the congregation's settlement system site a few days beforehand.

As the Congregational Record encourages congregational self-disclosure, so the Ministerial Record encourages self-disclosure by the minister. In most cases ministers have invested a great deal of themselves in completing the MR and look upon their expression of interest as an offer of their ministry and themselves. Their sense of vulnerability is often high at this point. The wise committee will reach out to each minister immediately, treating this first contact as potentially its first with its next minister. The committee should also be ready to indicate its timetable for deciding on the ministers with whom it wishes to exchange informational packets. The information requested in the MR can be viewed in the *Resource Guide*.

As the year progresses, additional ministers may indicate interest, often spontaneously, and sometimes as a result of the search committee's recruiting or the Transitions Director's encouragement. An eye should be kept on the committee's “List of Interested Ministers” for new arrivals.

Newly graduating students normally will not receive Preliminary Fellowship until they graduate and complete other requirements. Their MRs are sent on the condition that they are granted Preliminary Fellowship.

The committee then considers the MRs of prospective ministers and exchanges informational packets with those in whom interest is mutual. The committee might view a minister's expression of interest as a hand extended in greeting. The committee's initial decision will be, whether to extend a hand, in the form of an invitation to exchange informational packets, in return. Committees are urged to recognize that the reading of a Ministerial Record is an imaginative rather than an abstract exercise. The question is not how accomplished or experienced is this minister, but rather, how might this minister fit with this congregation? As with any such exercise, be prepared for intriguing ideas!

As packets arrive from ministers with whom consideration is going forward, they should be systematically circulated among committee members. Packet reviewers should make notes—but not in

the packets themselves! Ministers whose packets are returned will wish to reuse them. In taking notes it is helpful to include seemingly trivial distinguishing characteristics. If only the profound points are noted, after a dozen packets the ministers will blend together.

The committee must take care to return promptly the packets of those it rejects. It is not fair to the ministers, most of whom have indicated interest in other congregations as well, to retain them for more than three weeks. If the committee decides to put a minister on hold, that decision should be communicated to the minister immediately and candidly. Many ministers now serving happily and effectively were not “first round draft picks.”

Ministers are expected to complete the Ministerial Record fully and honestly. The description of past ministries should not ignore or misrepresent problems that may have existed. If a committee finds, as it checks references, an MR that is misleading, it should report this to the Transitions Director.

A delay in the return of packets, the return of packets without comment, and the accompaniment of returned packets with inconsiderate and unrequested feedback are chiefly responsible for resentment among ministers in search.

Nominations

While it is best not to invite their doing so, members of the congregation may suggest ministers they know or have seen. A committee receiving such a nomination should accept the name and any accompanying information, thank the member, and explain that the committee will consider the name seriously but will not be able to report what, if anything, it has done about it. It is improper for ministers to “lobby” members of the congregation to submit their own or any other name. If this occurs, the details should be reported to the Transitions Director immediately.

Recruiting

Search committees are free to ask ministers and members of other congregations for referrals to ministers capable of serving their congregation well. Committees are likewise free to contact those ministers and others whom they may know and to recruit them to the committee’s consideration. Committees should insist, however, that a minister responsive to a recruiting effort submit her or his Ministerial Record through regular Transitions Office procedures. Doing so is an essential step in the committee’s “quality control.”

As it sifts and winnows its potential candidates down to a “short list” of ministerial pre-candidates, the committee develops the closest possible acquaintance with its prospects and engages in the most careful reference checking. The wise search committee will not winnow in haste. Many is the committee that in its zeal to retain “only the best” for further consideration, wound up with only one or two ministerial pre-candidates and desperate for more. While the committee is making its decisions, ministers are deciding, too!

As for the sifting part, a search committee that does not carefully interview the references of its pre-candidates before selecting them, and does not turn up and interview additional references and perform a criminal background check of its prospective candidate before naming her or him, cannot serve its congregation well. Wise congregations now do criminal background checks of volunteers who will be working with children, and bond staff and volunteers who will be handling money and caring for church assets. No one will be placed in situations requiring greater trustworthiness and prudence than the congregation’s minister.

Most ministers offer, either in the packet or on request, a number of persons whom the committee may call as references. If the minister has not supplied them, the committee should insist on references from each congregation or other setting in which the minister has served, and in arriving at its

list of pre-candidates the committee should call all of them. In addition, as the pre-candidates list narrows the committee may call the District Executive in any district where the minister has served. After exploring the minister's history, the committee should be able to answer the following questions for each position the minister has held in the last ten years:

- * What contributions did the minister make in this position?
- * What did the minister do especially well?
- * What were the most frequent criticisms of the minister? How did the minister respond to criticism?
- * Did the congregation or employing institution prosper during this ministry?
- * How and why did the ministry end?

When the prospect is a graduating student, these questions should be answered with respect to the internship and other ministry positions held while preparing for the ministry. If the internship supervisor is not listed, the committee should request the name and make this important call.

It is not necessarily the minister's fault if a church declines in size or budget or falls into a conflict. Even a dismissal or negotiated termination does not necessarily reflect poor ministry. It should be recognized that a minister who has difficulty in one situation may often do well in another. The committee's greatest challenge at this stage is to select as pre-candidates those imperfect, all-too-human ministers who will be the best possible "matches" with the imperfect, all-too-human congregation that the committee represents. It is thus entitled to know its prospects' past accomplishments and difficulties so it can explore further what they imply for its decision.

Group telephone interview

As the search committee zeroes in on its pre-candidates, it will want to develop its own, independent sense of the ministers in whom it is most interested. A prearranged group phone interview is often illuminating, offering the committee the opportunity to experience the interactive style of the minister, and the minister the chance to experience the dynamics of the group. This is the time to "get real." If not now, when?

Developed references and safety precautions

References named by the minister usually hold the minister in high esteem. Nonetheless, it usually is possible to get at least a hint of any problems. The wise committee develops additional potential references during its conversations with the references named by the minister.

In the event that the committee wishes to name a minister as one of its pre-candidates, it should with the minister's acknowledgement conduct interviews with developed references in *previous* congregations served and with named references in the current congregation. A committee that calls developed references without the minister's awareness violates the spirit of mutual respect that lies at the heart of the search process and that is crucial to the establishment of a new ministry. In the case of a settled minister, the ripple effects of such calls may well make continuation in the present congregation difficult or impossible. Furthermore, there is no need to investigate in secret. The committee is in a position to insist on talking with more references as a condition of the minister's remaining under consideration.

Interpretive file summaries

When the committee has selected its pre-candidates, it is encouraged to so inform the Transitions Director, including, as well, a brief statement of the committee's reasons for interest in the pre-candidate. The Transitions Director will survey the ministers' files at the UUA and prepare a written interpretive summary of each, describing reviewers' views about the each

minister's strengths and weaknesses, and giving notice of any matters meriting concern. Reports from physicians and psychotherapists will not be relayed. The Transitions Director will exert his best efforts to review the summary with the minister before sending it, and to send it within ten business days of receiving the request. If the committee's impressions seem one-sided or incomplete, the Transitions Director will suggest questions for it to pursue with the minister or with references.

Criminal records background check

In most cases, the minister's file consists largely of materials submitted by the minister or with the minister's approval. Some few files contain records of ethical violations that have led to previous suspension of Fellowship, or of track records so poor that the minister was once put on hold for settlement.

It is possible, however, for matters meriting serious concern to escape the notice of the UUA. Thus the committee must take upon itself the responsibility for a conclusive background check and a full picture of each pre-candidate's track record. For the most part, this background check is best accomplished by more and more extensive reference checking. Once a committee has tentatively identified its candidate, it is encouraged to perform a criminal records background check, with the minister's permission, of course. See the on-line publication, *Responsible Staffing*, for specific guidance on a congregational policy and implementation strategy.

Pre-candidating Weekends

Finally, the committee invites its pre-candidates to town for an extensive interview, a tour of the congregation's community and facilities, and a preaching engagement in the "neutral pulpit" of a neighboring congregation. Once the committee's selection of its pre-candidates is firm, the next step is to schedule each one for a pre-candidating weekend. Typically the minister arrives on Friday evening, tours the building and community Saturday morning (special attention to the housing market is always helpful), interviews with the committee much of the rest of the day, and dines with it that evening. On Sunday the pre-candidate appears in the "neutral pulpit" of a nearby UU church. After lunch with the committee, the minister departs.

For each pre-candidating weekend, a committee member will need to be responsible for each of the following:

- * Transportation
- * Housing
- * Meals
- * Tour of community
- * Moderating the interview
- * Neutral pulpit arrangements.

Sample pre-candidating weekend schedules are to be found in the *Resource Guide*.

Arrangements

The search committee is responsible for the pre-candidate's expenses, including auto mileage, air fare, lodging, and meals. Home hospitality should be used only as a last resort: a long interview, a pulpit appearance, and social meals are exhausting enough without the additional stress of being a guest in someone's home.

The minister's spouse or partner may wish to come along on the pre-candidating trip or to visit the community at another time. While only the pre-candidate's expenses must be covered, a growing number of search committees offer to cover a trip for the spouse or partner as well. Not

only is it a welcoming gesture, but considering that many ministerial partners or spouses command earnings in excess of the minister's, it may be the soundest investment a congregation can make. The committee will want to take care not to give the spouse or partner the impression that it expects him or her to be part of the ministry.

Interviewing

To prepare for the pre-candidating interview, a mock interview with an experienced minister is helpful. The congregation's interim minister will probably be glad to serve in this capacity, or often better, to serve as process observer of the committee's interview with a neighboring minister. One or more mock interviews prevent the embarrassment of using the first pre-candidate for "practice," and prepare the committee for the moment when the table turns and the interviewee turns interviewer!

One good plan is for each committee member to take a topic area—for instance worship, religious education, social action, self-care, administration, or finance—and to brainstorm a list of questions to be answered by each pre-candidate, bringing the checklists to the interview. The interview itself should be informal, with each committee member free to ask any question or to probe for further clarity. The chair can call on each committee member in the course of the day to make sure all the questions have been answered.

Before the interview begins, the committee should negotiate the day's schedule with the pre-candidate. This is a mutual discussion, and the minister expects some time to ask questions of the committee. If, in the course of the day, concerns or questions arise, it is best to voice these directly so the minister can respond. Plan for plenty of break time; a good match can be spoiled if people get worn out and testy.

A collection of questions used in pre-candidating and other interviews can be found in the *Resource Guide*.

Neutral pulpits

Planning for the neutral pulpit visits should begin several months in advance, before the selection of the pre-candidates, with calls to neighboring UU congregations to reserve three or four Sundays.

The committee will need to promise to supply a worship service even if it has no pre-candidate. Most congregations have laypersons highly capable of leading a service. Perhaps they will volunteer to be "in reserve" to fill the neutral pulpit or to fill the congregation's own while the interim minister fills the neutral pulpit. All this must be done discreetly, without violating confidentiality.

Once a minister accepts a pre-candidating date, the obligation to fill the pulpit on that date shifts from the search committee to the minister. No honorarium is necessary or expected; if one is offered, it may be retained by the minister. The minister's first obligation is to the people of the host congregation. It should count for and not against a minister that he or she accommodates their customary style of worship.

In the event a pre-candidating interview is canceled, whether by the minister or the search committee, the minister is still responsible for filling the pulpit, or for finding a substitute. The search committee is still responsible for the minister's travel expenses. Especially if the search committee canceled the interview, it should do all it can to help the minister in filling the pulpit, but the final obligation rests with the minister.

Neutral pulpit arrangements should be made directly with the host minister or, if there is no minister, with the program chair. As few people as possible should know the reason for the visit.

In selecting neutral pulpits, committees should avoid other congregations also in search, since a minister appearing in a congregation in which the minister has departed or has announced his or her departure is rendered ineligible for that vacancy. Ideally, the neutral pulpit congregation should be similar in size and style to the committee's own. Because this is not always possible, non-UU churches are sometimes used.

If the pre-candidate is serving a nearby congregation, it is all right for the committee to visit a service there so long as the minister approves. Unannounced visits, even by one member of the search committee, weaken trust and are strongly discouraged.

After the service

Where the ministerial position to be filled carries heavy preaching responsibilities, the pre-candidating sermon carries a lot of weight. Following the service the minister is likely to be in a state of advanced decompression, defenses down. The post-service lunch, usually the last event of the weekend, is thus liable to be a revelatory event.

Now is the time, if it hasn't been done before, for the committee to ascertain the conditions under which the pre-candidate may consent to become the candidate. Two questions must be asked:

- Are there any concerns or misgivings that you have about our congregation, any questions you haven't yet had the opportunity to ask? and
- What about our financial package? If, on reflection, you and we feel positive about each other, would you be able to come here with the amount of money we're offering?

Though not the time for negotiating, this is the time to unearth potential misgivings. The committee needs to know what issues it will have to deal with if it wants this minister to be its candidate.

Selection

Having met with all pre-candidates, the committee selects one minister or ministry team as its candidate for recommendation to the congregation. When all pre-candidates have been interviewed and heard, the search committee must reach a decision on a candidate. Sometimes the drift of the committee's feeling has been clear for weeks; going through the motions in these circumstances can be excruciating. Do it anyhow. Woe to the committee that creates in its congregation the suspicion that its love for one candidate blinded it to all others! It will prove useful to ask all search committee members to write and share their particular reasons for choosing its candidate. The reasons will be different — sometimes even mildly conflicting — and will suggest the diverse reactions the candidate will encounter in the congregation.

Most of the time, one candidate will not emerge as everyone's first choice. This need not prevent consensus on the best candidate for the whole congregation. The first step in this case is to hear and respectfully acknowledge each committee member's appraisal of each pre-candidate. It can be helpful for members to try to summarize the views of those who disagree with them, and ask for their understanding to be corrected.

Allow plenty of time. Pressure for an early decision can push strong feelings underground, where they may later erupt. It can also change honest differences into personal conflicts. Sometimes renewed discussion at a later meeting shows the matter in a different light. The MSR and the Transitions Director are ready to consult if need be. A committee may need to resort to its earlier decision about what to do if it cannot reach consensus. The concerns of dissenting search committee

members should be taken seriously, but no one individual should be allowed to hold the congregation hostage for reasons not likely to be broadly shared.

In order to allow the great majority of congregations and ministers to exercise due deliberation in their search, the Transitions Office requests that no candidacy be offered or accepted until March 15, unless both congregation and minister have completed all their pre-candidating weekends.

The minister and the negotiating team settle on a proposed ministry agreement for approval by the governing board, the board and minister execute the agreement subject to the extending of the call by the congregation and acceptance by the minister, and the committee announces its candidate to the congregation. Once a decision is made, the minister selected should be notified promptly. Hopefully the feeling is mutual! Both the committee's offer and the minister's acceptance—and thus the candidacy itself—should be contingent on

- the results of interviews conducted, with the minister's awareness, with developed references in the congregation presently served
- the results of a criminal record background check, and
- agreement on the major terms of the ministry agreement.

The ministry agreement must be addressed immediately. All issues to be negotiated must be identified up front, and discussed between the minister and the negotiating team. If the minister did not indicate that more money would be necessary when asked the question during the pre-candidating weekend, it is unseemly to do so now. Once all issues are settled, the minister and the president of the governing board sign the agreement, subject of course to the extension of the ministerial call by the congregation and its acceptance by the minister.

Then, and only then, may the candidacy be announced to the congregation. The committee should now notify all ministers remaining previously under consideration that they are so no longer, thus freeing them to pursue other opportunities. The Transitions Office also needs prompt notification.

Candidating Week

The candidate then visits the congregation for a two-Sunday candidating week. When the chosen candidate has accepted, the committee should schedule a mutually acceptable candidating week. This "week," which normally runs from Saturday evening through the following Sunday afternoon, is the climax of the ministerial search, and is thus to be carefully planned. A task force charged with working with the search committee to plan and execute the week can take a lot of pressure off the committee. Nevertheless, the week is the committee's final project, and one of its most important ones. Sample schedules of candidating week can be found in the *Resource Guide*.

The congregation traditionally invites the candidate's spouse or partner and children for candidating week. If, as often happens, this is not possible or desired, the congregation should offer to pay for a visit at another time.

The congregation should reimburse all the expenses of the candidate and family for all candidating week expenses, including auto mileage, air fare, lodging, and meals. The candidate should not be expected to accept home hospitality.

Candidating week is grueling for ministers and their families. Ample unscheduled time should be provided for house hunting, rest, and recreation. At least one search committee member should attend each of the candidating week events, *listening* for concerns or criticisms from members. The candidate, in consultation with the committee, will wish to respond immediately. It is a good idea for the committee to meet with the minister on Wednesday evening during candidating week to address any special concerns or the need for a mid-course correction.

At the end of the week the congregation votes on a motion by the search committee to call the minister on the terms proposed; if the call is sufficiently strong, and is accepted, the ministry begins as specified in the agreement. After meeting the committee's candidate in a variety of contexts, the congregation votes on whether or not to ratify the committee's work and extend a call. Generally this decision is made in a meeting called for the purpose, according to the congregation's by-laws. It is usually the search committee chair who makes the motion to call the minister according to the terms agreed upon, and the president who presides over the discussion. In order to avoid the bruised feelings caused by a premature calling of the question, the president may allow the discussion to proceed in a committee of the whole. The vote itself should be by secret (i.e. written) ballot, so that all feel free to vote their conscience. The result should be announced for all to hear, so that the amount of support of and opposition to the candidate is known by all. Although 49 out of 50 candidacies succeed, the congregation's support is not to be taken for granted. Most ministers hope for a vote of at least 95 percent; the Transitions Office normally discourages ministers from accepting a vote of less than 90 percent.

The minister should not be present for the congregational meeting, but will of course wish to learn of the meeting's outcome and the strength of the vote right away. The minister may have announced plans to be far away by the time the vote is taken, and to postpone acceptance of the call, if offered, until the next day, thus preventing any hesitation (based, for example, on the need to learn the reasons for a weak vote) from being misread as lack of enthusiasm for the congregation. It is best to prepare the congregation to expect a short delay as a normal part of the search process.

If the call is offered and accepted, the work of the search committee is almost over. In winding up, the Transitions Office and the MSR should be notified of the happy outcome. Leftover Ministerial Records, minutes of committee debates, or other records that may reveal confidential information should be destroyed. The Notice of Call form, available on line, should be returned with a copy of the ministry agreement. A celebration is in order: The ministry position is filled, and weekends are back!

For the congregation, the transition continues, and the committee may need to remind the leadership that there is much to do. The time is coming to bid the interim minister good-bye. The board must make sure it has budgeted enough for the minister's moving expenses and installation service. And the board should also contact the DE to schedule a Startup Weekend during the first months of the new ministry. This event provides the minister, staff, and lay leaders an opportunity to set goals, exchange expectations, and deepen the implicit contract between minister and congregation.

If all does not go well

After all this work, the committee may find itself among the small minority of search committees each year that do not settle a new minister.

- * It may have found that the ministers available at the salary offered are just not up to expectations. Either the salary or the expectations may need to change.
- * It may not have agreed on a candidate, in spite of its best efforts at consensus-building. Perhaps it is time for a new committee to try.
- * It may agree on a candidate who then turns the congregation down. A committee should not let pride alone stop it from calling its first runner-up. But it may have neither a realistic fallback candidate nor time to start with a fresh list.
- * Or the committee may go all the way through candidating week, only to face a vote that is too weak, and a candidate who declines the call.

Can any of these results be termed a failure? By no means! The only failure—the *only* failure—lies in calling a minister who is a poor match for the congregation. All other results are

preferable. Nevertheless, all of these results can be discouraging, to put it mildly. The committee will want to ask advice from the Transitions Director, the MSR, and the DE. If the problem stems from intractable personal or philosophical divisions in the committee, or between the committee and the rest of the congregation, resigning may be the best course. In any case, the congregation probably is looking at another year in search.

Start-up

Now it is time for search committee members to resume their role as “private citizens.” Search committee membership, rewarding as it is, is not without its hazards. Aside from the long hours, hard work, challenging issues, and emotional stress involved, search committee members can get disillusioned, sometimes with the congregation, sometimes with the very minister they had so large a part in choosing. It is not unusual for one or two members of a search committee to have left the congregation within two years of the new minister’s arrival.

In part, this is a side effect of the education that search committees get. By the time your work is done, you will know as much about your congregation as anyone. You will have a clear idea of its challenges, and some strong convictions about how it should meet them. And you will have grown accustomed, in your year of service, to holding a good piece of its future in your hands.

And then the search is over. You have called and welcomed the new minister. The minister may fulfill only imperfectly the potential you first perceived. Some of your best friends may be among the minister’s first critics. You feel obligated to defend the minister — after all, aren’t you responsible? If you think the criticisms have merit, you may approach the minister with suggestions. If these are not followed, it gets harder next time to offer a defense. You are in the “triangled position”: a third party trying to keep things fixed between the congregation and the minister. If you are on the board or Committee on Ministry, that position only intensifies the feeling that you ought to be able to do something.

Some advice: While you’re serving on the search committee, keep in touch with all the things that you find satisfying about being part of your congregation. You will not be able to carry major responsibilities, but continue to participate as you can. Sing in the choir. Help teach the second grade one Sunday *a month*. Spend time with friends. Attend a meditation group. Don’t allow yourself to become merely a “task” UU. Keep in touch with your family, spouse, or partner, too! The search is only a temporary phenomenon.

Then, when your work as a search committee ends, have a party. Don’t invite the new minister. Celebrate not the beginning of the great new era, but the end of your hard work as a committee. Give yourselves permission to become private citizens again. Remember, your responsibility has ended. It is not up to you to make sure your new minister is a success. You have no special obligation to defend or mediate or give advice. Your obligation to support your minister is no greater than any other member’s.

You have given much. Your congregation and the whole community of Unitarian Universalism owes you thanks and a hearty “welcome home” after your strenuous journey.

Recommended procedures for ministers

Special Topics

- Settlement rules
- Community ministry
- Searching while serving
- Ministers' files at the UUA
- Giving notice

Whether the time has come to serve, to leave, to find a situation that better suits one's developing capacities, or to make more money, ministers beginning to search for a new situation should consult this Settlement Handbook fully. Changing jobs or starting a first one is hard, involving the loss of familiar surroundings and routines, the stress of uncertainty, and the potential for family conflict. This guide to the Unitarian Universalist Association's ministerial settlement process will not eradicate the stress, but it does offer such security as comes from knowing customary procedures and professional requirements. It seeks to provide the tools ministers need to play an active role in finding a ministry that "fits." The Transitions Director is always pleased to listen, and to offer counsel, and to make suggestions.

The Code of Professional Practice of the UU Ministers Association states: "I will inform myself of the established candidating procedures of the UUA, and I will strictly observe them." When a minister accepts Ministerial Fellowship, he or she agrees to abide by the procedures established by UUA's Ministry and Professional Leadership staff group. This *Handbook* describes the procedures referred to. Ministers should be familiar with the sections both for congregations and for ministers, and follow the procedures closely.

Settlement rules

There are very few rules surrounding the search process. Ministers are free to recommend one another to search committees, free to respond positively (or with discouragement) to recruiting efforts by search committees, and of course free to be considered by search committees. Ministers should be cautioned that a potential ministry begins with each first search committee contact. Candor is required. Misrepresenting one's track record or concealing anything that a committee needs to know on behalf of its congregation is a serious offense. Ministers who agree, in response to a recruiting call, to be considered by a committee must proceed by completing the MR and "clicking" on the Congregational Record.

Ministers are free, too, to speak with their colleagues about congregations in search and their progress in search. Discretion about one's triumphs never goes amiss.

The independence of congregations and the special role of the search committee must of course be respected. The Rules and Policies of the Ministerial Fellowship Committee define several circumstances in which a minister may not accept a ministry position. The following summary reflects these rules and policies as applied by the Transitions Office:

Three-Year Rule: For three years after the completion of a student ministry, ministerial internship, or interim ministry, a minister may not accept any professional position in the same congregation. This rule also applies to ministers who have done student field work or ministry, or filled other ministerial positions in the congregation.

Professional Appearance Rule: A minister who has visited a congregation in any professional capacity after the past minister has announced his or her resignation to the congregation shall not be recommended for that position to that congregation for twelve months following the visit. For a new ministry position, this rule applies from the date the congregation or its board votes definitely to create the position. “Any professional capacity” includes a visit as an MSR, leading a class or workshop, or performing as a musician. It does not include an interview for an interim ministry. If in doubt, check with the Transitions Director for clarification *before* accepting the engagement.

Inside Candidate Rule: A minister who is a member or staff member of a congregation with a vacant position may permit him- or herself to be considered only as an “inside candidate.” As such, the minister may not accept a call after the Transitions Office has submitted a list to the search committee. Thus an inside candidate must apply to the search committee early in the process, and the search committee must make a yes-or-no decision before considering other candidates.

It is the responsibility of ministers in Fellowship to adhere to these rules and to be in touch with the Transitions Office *in advance* about any gray areas or exceptions. In most cases exceptions must be made by the Ministerial Fellowship Committee itself, so it is wise to allow plenty of time.

At first glance, this process may seem complicated and the rules intimidating. Actually, just as the volumes of statutes defining various kinds of theft could be summarized as “Thou shalt not steal,” the settlement process boils down to “Thou shalt treat congregations with respect, and colleagues likewise.” Most of the rules and customs of the settlement process are the result of generations of experience. But there are new procedures here, too. Old or new, the practices described here have a single purpose: to contribute to the conditions which make possible excellent ministry, with “ministry” understood not simply as a career but as partnership, as work ministers and laypersons perform together.

The most important point for ministers to keep in mind is that the settlement process itself is ministry. Even with the search committees of congregations they will not ultimately serve, ministers’ conduct in the search process reflects on the Unitarian Universalist ministry, touching, for good or ill, the life of each search committee member they encounter.

Community ministry

Community ministry includes most ministries in settings other than congregations, such as hospital, military and academic chaplaincy, social service and advocacy ministries, and seminary teaching. Each form of community ministry has its own channels of communication about job opportunities. Ministers in search of a community ministry position should seek advice from ministers experienced in their specialty. The Transitions Director can assist ministers in finding such advice. Some information on vacant community ministry positions is available in “Opportunities for Community Ministry”.

All ministers and students in candidate status are free to read Congregational Records, but only ministers who are cleared for settlement and have completed the required forms may enter the search process. To be cleared for settlement by the Ministerial Credentialing Office, new ministers must be approved by the Ministerial Fellowship Committee and be within seven months of graduation from theological school. The Ministerial Credentialing Director will explain what is required in each particular case. Before indicating interest in a congregation, a minister must confirm with the Transitions Office that it has received the following items as appropriate:

- **Assurance of graduation** by a certain date from the Ministerial Credentialing Office.
- **Ministerial Record (MR)**, to be updated annually by ministers seeking settlement, otherwise every three years, to introduce the minister to search committees. It is to be completed fully and submitted on line.
- **Application for Ministry Position**, providing information about the minister's theological views, preferred type and style of ministry, and demographic characteristics to the Transitions Office. This is not shared. It is to be completed and submitted on line every year the minister is in search.
- **Application for Interim Ministry Position**, for ministers who would serve in an interim capacity for the year, is also for the Transitions Office only. For further information see the *Interim and Consulting Ministries Handbook*.

Once the forms are up to date, the minister may enter the search process, indicating on-line to the Transitions Office those congregations to which the minister's MR is to be made available. Ministers are cautioned to be prudent; fifteen such indications is the initial limit.

All UU ministers, whether in search or not, may readily gain access to Congregational Records on the UUA website. Similarly, all UU ministers, whether in search or not, may—and probably should—create and maintain their Ministerial Record. Only ministers going into search must complete an application. Because congregations generally expect their new minister to arrive on or about August 15, ministers wishing to move should prepare themselves about a year before.

Searching while serving

A minister currently serving who decides to enter the search process may be faced with a delicate situation. An early announcement of the desire to leave will at best weaken the minister's relationships should the search be unsuccessful, and at worst let loose congregational dynamics that lead to early termination. An announcement deferred until the minister is called to a new position, on the other hand, may prevent necessary closure of existing relationships and be experienced as capricious by the congregation. Wise ministers will ordinarily take one or two trusted leaders into their confidence. Normally these are persons the minister will list as references. An assistant or associate minister or MRE will notify the parish or senior minister in all but the most unusual situations.

In addition to the Ministerial Record, the minister prepares an informational packet to exchange with search committees. The Ministerial Record is a complex, lengthy document, both a resume and, like most resumes, a marketing tool. Its purpose is to paint an accurate portrait of the minister as minister and as person, and to describe fairly the minister's accomplishments, strengths, and weaker areas. The purpose of the informational packet is to provide a rich and thorough presentation of a minister's style, skills, and experience. In this respect the packet is a record of a life in ministry: ministers should begin gathering materials for inclusion during their theological school and internship years, and never cease. In the MR, the packet, and in conversation, ministers must present themselves to search committees honestly, but without blowing any problems or difficulties out of proportion. If there

is pressure to resign, or if there is anything in the minister's personal or professional history that is likely to become an issue if revealed or discovered, the minister must be candid with the Transitions Director.

Ministers should prepare the Ministerial Record and get well started on a search packet before indicating interest in being considered by a congregation. The wise minister will not keep a search committee waiting! In preparing the packet, it is helpful to view several packets used by colleagues who have been recently settled. Many District offices have recent examples. It is also helpful to ask a colleague recently successful in search to review one's packet, with two questions in mind: "Does this packet represent a minister? And, is the minister the packet represents *me*?"

A sloppy or dog-eared packet never makes a good impression, nor are over-the-top production values often found appealing. Above all, the style of the packet should represent the minister's best ministerial style. There is some move toward on-line packets, but so far these seem to be additional to rather than in lieu of printed packets. To be included:

- Cover letter
- Ministerial Record
- Biographical introduction, perhaps including the story of the minister's call to ministry
- Five or six sermons on a variety of themes
- Worship services and rites of passage composed by the minister
- Newsletter columns
- Outline of a workshop or religious education class conducted by the minister
- Any published writings
- A variety of photographs, in a variety of situations
- A page or two on each major aspect of ministry; where artifacts are not available, it may be helpful to write a brief statement on an area that might otherwise be neglected.
- A list of references, or the indication that a list will be supplied once the committee-minister conversation advances.

While some ministers choose to include audio or videotapes, results are mixed. An amateurish video of a talking head against a dark curtain is painful to behold. An audiotape introduced by a distorted organ prelude and an inaudible children's story does not show good judgment.

With the exchange of packets, earnest mutual consideration begins. The Ministerial Records of all ministers who have indicated interest in a specific congregation are made available to the committee when it so requests, and at regular intervals thereafter. Ministers are notified of the date this was done on the "My List" screen on their section of the settlement system. A committee's request that it receive no additional names will, however, be honored.

Once packets are exchanged, prompt, pleasant, non-anxious communication can make the difference between a successful candidate and the first runner-up. Ministers may hear from references that they have been interviewed, or perhaps grilled, by search committees. This is good news! Ministers may be asked to schedule a telephone interview with the entire committee. This is very good news! Ministers should feel prodded by the request to conduct a thoughtful, increasingly exhaustive investigation of the congregation at hand. Review the CR many times over. Review the range of questions that may be asked in the *Resource Guide for Ministerial Search Committees*. A minister who says that he or she is interested in a particular congregation, but who does not, before a group phone interview, contact the interim minister serving the congregation, the outgoing called minister, knowledgeable ministers in the District, and the District Executive, scarcely exercises appropriate ministerial initiative. The process of finding a good match requires the minister's most earnest inquiry

and a “hermeneutic of suspicion.” And as the minister plans to be interviewed by the search committee, so she or he should plan to interview them.

If the minister’s interest in a congregation does not continue, it is important to convey this message in a way that reflects well on the ministry. A minister’s withdrawal can be demoralizing to a search committee. Ministers do well to avoid giving even constructive feedback unless it is requested.

The Transitions Director welcomes opportunities to speak with ministers about their search as the year progresses.

Ministers should be aware that search committees will seek information about them in a multitude of ways. Search committees know that the best way to understand how a minister will conduct him- or herself in the position they offer is to examine how the minister has conducted him- or herself in other, previous settings. Committees thus reach out inquisitively, speaking with the DE in the Districts in which the minister is serving and has served, studying the letters of reference that ministers offer them and calling the writers thereof, eliciting additional names (“developed references”) from those whom they call, asking the minister for more names, and Googling the minister, as well. When they reach the decision to ask the minister to be a pre-candidate, they are entitled to ask the Transitions Director for an interpretive summary of the minister’s file at the UUA, and to contact—with the pre-candidate’s acknowledgement--the developed references in congregations the minister previously served. And increasingly, they require a criminal background check of their ministerial candidate. In the midst of all this, the minister may begin to feel talked about!

To the greatest possible degree, ministers being so scrutinized are urged to cultivate a spirit of mutual discernment and non-defensiveness. This process really is about finding a match, not a job. And in fact, who would wish to serve a congregation in which such care in the choice of a minister were not exercised? Once called, the minister will be able to invoke the practice of such scrutiny in hiring church staff and recruiting volunteers. However, there are limits: reference checking is one thing, invasiveness another. Ministers who feel that a search committee is not keeping faith with them, or that their legitimate privacy is being violated, are urged to say so, and to contact the Transitions Director.

Ministers’ files at the UUA

In fulfilling its charge to admit qualified ministers into fellowship, the Ministerial Fellowship Committee requires the Ministry and Professional Leadership Staff Group to maintain the records of ministers so admitted. Ministers’ records are thus the property of the UUA, maintained with fiduciary concern for congregations’ safety and well-being and with respect for ministers’ privacy. They may include settlement, pension and insurance, ministerial aid, and MFC records (including student, Regional Subcommittee on Candidacy, and other Ministerial Education Office records and any complaint files); evaluations, assessments, psychological and career center reports and medical records; communications from District Executives, communications of recommendation and criticism and staff group responses thereto, communications from the minister, and staff notes about the minister. With the rare exclusion of materials submitted with the understanding that they would not be shared with the minister, the file is open to inspection by the minister.

The minister will be given every opportunity to view and perhaps correct the interpretive summary the Transitions Director prepares for committees that have named the minister a pre-candidate, and to include comment, if desired. (Material from psychological reports and medical records is neither included nor referenced in the summary.) A minister who is unsatisfied with the summary prepared by the Transitions Director is entitled to file an objection with the Director of the Ministry and Professional Leadership Staff Group.

During the pre-candidating weekend mutual consideration reaches peak intensity. A minister invited to pre-candidate should think carefully about her or his interest in the congregation. Financially and otherwise, a pre-candidating weekend is a big investment for the congregation and the members of the search committee, all of whom have lives and families and jobs of their own. The minister should thus accept the invitation only if, knowing what he or she knows now, service in and with this congregation is a live option. If the minister requires a higher salary, the time to say so and to say how much is now—*before* accepting. If the cost of living or other geographic factors give rise to doubts, the time to raise them is now—*before* accepting. A minister may legitimately wish to withdraw later for reasons currently unforeseen. But it is up to the minister to candidate in good faith at all times, and that means raising any such concerns at the earliest possible moment. Ministers who are tempted to accept four or more pre-candidating invitations would do well to re-examine their choices in the light of their criteria.

As with any employment interview, there is no point in coming unprepared. Study the congregation's packet thoroughly—again! Ask for more materials if something is missing. Speak with the District Executive, former ministers, the interim minister, and nearby colleagues—again! Search out information on the community in the public library and on the web. Above all, the minister should identify the major issues and trends that seem to face the congregation and be prepared to discuss them in the interview.

The minister will want to ask for time during the pre-candidating weekend to raise questions of his or her own with the search committee, and perhaps to propose an activity to encourage committee members to express their differing hopes for the congregation. Above all, the minister should try to give the search committee the experience of what it would be like if he or she were their minister.

While the pre-candidating weekend is not the time for negotiation, the minister should be prepared to identify any existing concerns about the provisions of the draft ministry agreement, and to agree to identify, within the next week or two, any new concerns that may have come to light during the weekend. A minister who leaves concerns unvoiced—concerns about the duties and role of the minister in the congregation, about the compensation package, about sabbatical provisions—forfeits the opportunity to raise them once the committee has asked the minister to be their candidate.

It has become common for search committees to invite the minister's spouse or partner to come for the weekend. Seldom do children come until candidating week at the earliest; for a variety of reasons, families may find a trip at another time more practical. One visit by the family is at congregational expense, although the congregation may offer more.

Once the minister is asked to be the committee's candidate, final scrutiny must be expected and the ministry agreement negotiated before an announcement can be made. The search committee will ask the minister's consent to their contacting developed references in the congregation the minister currently serves and conducting a criminal records background check. If the earlier discussion of the draft agreement was thorough and candid, few serious issues should remain to be resolved. Any temptation, in this moment of euphoria, to gloss over any difficulties must be resisted! A minister who allows her or his name to be announced as candidate without having in hand a copy of the ministry agreement, signed by both parties, including the provision, more or less, "This Agreement represents an official offer to the Rev. _____ when the call to the Minister is extended by the congregation and accepted by the Minister," puts the new ministry seriously at risk. For sample agreements and other helpful information, see *Joint Recommendations Concerning Letters of Agreement between Ministers and Congregations*.

Usually the negotiations can be done by phone and fax, but an additional trip to meet with the negotiating team may be advisable, especially if important issues hang in the balance. The cost of such a

trip is appropriately shared between minister and congregation. If there are problems, the MSR, District Executive, or Transitions Director may be called upon for help. As soon as the agreement is settled, the minister should inform the Transitions Office of the candidacy and withdraw from consideration by any other search committees.

Giving notice

A minister currently serving a congregation who accepts a new position must immediately notify the board president, the chair of the Committee on Ministry, and any other ministers serving that congregation. Ideally, the board chair will call an immediate board meeting, at which the minister can both inform the board in person and deliver a formal letter of resignation. The wise minister will have a letter to the congregation ready to mail out, so that to the greatest extent possible, all members receive the news directly from the minister rather than at second or third hand. The drama of a pulpit resignation is thus avoided, and with it not only unkindness to fragile people but opportunities for angry (or joyful!) first reactions. Recommended during the last weeks and months of a ministry are two books by Alban Institute consultants: Roy Oswald's *Running Through the Thistles: Terminating a Ministerial Relationship with a Parish* and Edward A. White's *Saying Goodbye: A Time of Growth for Congregations and Pastors*. The Transitions Office provides the former to departing ministers free for the asking.

The purpose of candidating week is to confirm the choice of minister and search committee.

Although candidating week is for mutual appraisal, ministers should accept a candidacy only if they are reasonably certain that they would accept the call if it is offered by a strong vote. Declining a call for reasons that could have been foreseen before candidating week is extremely inconsiderate.

Especially for new ministers, candidating week is a full and stressful time. Wise candidates insist on enough private time for rest and family, and to prepare for the second Sunday service. The candidate and the search committee should plan the week together, making sure no important group in the congregation is slighted.

The candidate should encourage the search committee to be her or his "eyes and ears" during the week. If concerns or questions arise, it is generally best to address them as soon as possible. In such a case the minister should consult with the MSR or the Transitions Director.

A vote of 90 percent is probably the bare minimum a minister should require. Ministry is hard enough without ten per cent of the congregation rowing the other way. While the minister will wish to explore with the search committee dissent expressed during the congregational meeting, in no event should the minister be present at the meeting itself.

It may be wise to leave town before the vote. Although accepting does no harm if the vote is strong, a congregation that expects an immediate acceptance will be disappointed if the minister hesitates. The minister who says from the beginning that he or she will not in any case accept a call until Monday morning is relieved of the awkward need to ask for additional time.

Above all, before, during and after search, respect the stress of the experience even as you appreciate the new possibilities it offers. Going into search is often one of the most stressful and disorienting periods in a minister's career, capable of severely straining family relationships. It is important to be realistic about the toll a transition takes on you and those you love. Take time to talk about your plans and to enjoy yourselves. It may help to employ a counselor for you and your family for the sake of clarifying your reasons for making the move and identifying the factors that would make it worthwhile. As always, you are encouraged to call on the Transitions Office for support if you need it.

Ministers in search need to be prepared to have their professional and even personal history examined in detail. Even when there is nothing to be ashamed of, you may feel shame, embarrassment, and indignation. It can be helpful, if you feel too much under the microscope, to say so. It can be appropriate at times to set a limit to what you are willing to discuss or disclose.

If you are now serving a congregation, remaining in close relationship with them while seeking a new call may feel false. Pouring time and energy into the search process may bring on feelings of guilt. And then, when you disclose your plans, very likely anger and hostility will come your way—from the very people who value your ministry most. While some of their criticisms may well be valid, behind much of the feeling is grief over the loss of a beloved minister. If this happens to you, it may help to know that you are being given a chance to show by example that both pain and joy can be borne with grace.

Remember that you have a right to move. Ordination is traditionally a lifetime vow, but your commitment to a particular church or other site of ministry is temporary. As the saying has it, ministers have a choice: they can leave too soon, or they can leave too late.

It is the experience of our colleagues through the years that many of the hopes that motivate a move are realistic. If you would like to change your style or habits, a new place gives you a good chance to do so. If you would like to find a congregation that appreciates you as you are, your candor in the search process will help you find one. If you suspect that you would prefer a congregation of a different size or emphasis or in a different place, you may be right. You will no doubt find some of your old problems in new guises: “wherever you go, there you are.” But in most cases the experience of moving, strenuous and wearing as it is, becomes an opening to new growth and more effective service.

FAQ (Frequently Asked Questions) File

Questions from search committees

Hearing a pre-candidate in his or her own pulpit

Q: We are considering a minister whose present congregation is nearby. Can we go listen to her on her own turf?

A: If the minister concurs, yes indeed. Espionage is never a good plan; mutual consent should govern all of your relations with your prospective ministers.

Don't consider a visit on the minister's turf to be the equivalent of a pre-candidating service, however. You will want to compare your experience of all your pre-candidates on similar, neutral ground.

Personal questions

Q: I work in personnel and am aware of many laws governing employment interviews. Can we ask about the spouse and children, health problems, addictions, disabilities, sexual orientation, and other personal matters?

A: In both the United States and Canada, churches are allowed wide latitude in the selection of their spiritual leaders, the relationship between minister and congregation being more than an employment contract. You are entitled to know the minister personally and to know how the minister presents his or her personal life in a professional context. Also, to the extent that a personal matter is publicly known in another congregation, you will need to be prepared for the possibility that it may surface in yours. Personal conversation that would be out of place in a business setting is accepted when a search committee interviews a minister.

At the same time, Unitarian Universalist congregations are generally committed to equal opportunity for everyone, and do not want even to appear to discriminate on the basis of age, ability, race or ethnicity, sex, sexual orientation, or gender identity. You will likely want to reassure potential candidates that you respect their need for privacy and do not regard ministerial family members as auxiliary church staff. If there is something of a personal nature that is of concern to you as a search committee, think carefully about how to phrase your question. If possible, base your query on something the minister has said or written. Probably you will not wish to ask a woman anything you would not ask a man, or a minister of color or member of a traditionally marginalized group anything you would not ask one of Euro background.

Relate your question to the minister's professional performance, where it belongs. Is your question, "Will your wife's career require you to take time away from work to take care of your children?" or is it, "How do you balance the demands of parenthood and ministry?" Is your question, "With your background, how would you fit into a wealthy white suburb?" or is it, "What special challenges do you see in ministry to our community?" Is your question, "Won't a gay minister scare away young parents?" or is it, "How would you help us to respond to people who are frightened about having our first gay minister?"

As a rule, it is better to let the minister bring up a personal topic first. If, after interviewing a candidate for several hours, you are still concerned about a personal matter that might affect his or her reception by the congregation, by all means ask. When asked a personal question, most ministers will respond candidly or explain gently why they prefer not to. Remember, though, that what you are legitimately interested in is not the minister's personal life, but the way that life affects the ministry.

Low-ball salary offers

Q: Where I work, job openings always list a range of salaries, depending on the qualifications and experience of the person chosen. We would like to list our ministry position that way, too. Can we?

A: Yes. In fact the Congregational Record encourages your doing so. Evaluating qualifications and experience, of course, is the hard part. Presumably you want the best minister for your congregation. If that turns out to be a new minister who has nevertheless gathered many of the fruits of experience in a short time and shows promise of gathering many more, that minister may merit compensation significantly above the minimum.

Joint pre-candidating visits

Q: Several congregations in our area are looking at the same time. Can we save some money by sharing pre-candidating visits?

A: Probably not. Pre-candidating takes a whole weekend. Since few search committees can meet on weekdays, it is hard (and, for the minister, exhausting) to squeeze two interviews into a single visit. And what committee would wish to be so unwise as to forego the post-sermon lunch, often the most tender and revealing time in the entire pre-candidating weekend?

Adjacent neutral pulpits

Q: We're setting up neutral pulpits. A neighboring UU congregation is also in search. Is there any problem with their being one of our neutral pulpits for pre-candidating weekends?

A: This is to be avoided! Imagine the mess if the other congregation decides it likes your pre-candidate!

Serial candidating

Q: The settlement process restricts us to just one candidate. Why can't we bring in all three pre-candidates on successive weekends and have the congregation vote?

A: Decades ago serial candidating was not uncommon. The design of the present search process is some part due to the necessity of avoiding the problems serial candidating presented: everything from vapid beauty contests to unseemly politicking to congregational splits, with two or three fragments walking away from each other, each with the minister they wanted but cannot now support. The congregation that cannot trust its search committee to make the best possible choice, based on lengthy, considered, and thorough engagement with prospective candidates, needs a new search committee!

General Assembly

Q. Should we send some members of the search committee to the UUA General Assembly?

A. Yes! GA is a great opportunity each June to learn about the diverse types of congregations in our movement and to experience worship as conducted by a variety of ministers. However, although GA can provide opportunities for informal interviews, doing so is generally unwise, for several reasons. By June, most search committees have not yet completed their self-study or clarified their congregational or ministerial profiles. In most cases it is not possible to send more than one or two members of the search committee to GA. And at that time of the year the Transitions Office has a smaller number of ministers available for settlement than at any other. The Transitions Director hosts a Search Committee Luncheon on Saturday of every GA and welcomes appointments.

Couples in co-ministry

Q: I've heard that married couples sometimes share a ministry position. Might we get such a couple on our list?

A: Yes. Any pair of ministers, married or not, may apply to share a position. You will receive paired Ministerial Records from them. Some congregations, having two ministry positions open, invite teams to apply.

If you consider a co-ministry team, remember that you are looking at three entities: two ministers and the team. Each has its own track record, personality, and strengths. To enable the committee to interview all three fully, very likely your pre-candidating weekend should begin on Thursday rather than Friday.

Ministerial ethics

Q: Are there rules for ministers? Can ministers be punished if they break them?

A: Yes. Like most professional organizations, the Unitarian Universalist Ministers Association (UUMA, not to be confused with the UUA) promulgates a *Code of Professional Practice and Guidelines for the Conduct of Ministry*, and can reprimand, suspend, or expel its members for violations. The Ministerial Fellowship Committee of the UUA, which grants Ministerial Fellowship, can reprimand, suspend, or remove ministers' credentials for "conduct unbecoming a minister or for other specified cause." Removal from Fellowship means that a minister will no longer be entitled to be listed. In lesser cases, violations can lead to restrictions on the minister's ability to serve.

Ministerial competence

Q: Are ministers ever taken off the market simply for incompetence?

A: Yes. The rules provide that when a minister's "overall record seems to indicate that his/her continued recommendation for positions ... by the Ministry and Professional Leadership is not justified," the Director can present that minister's name to the Ministerial Fellowship Committee for "special review." If the committee approves, the Transitions Office will no longer recommend that minister to congregations.

Telephone interviews

Q: Are there any special guidelines about telephone interviews?

A: Telephone interviews may help you narrow your list of possible pre-candidates. Remember that the ministers will judge your congregation partly by the consideration you show in interviewing them. To call suddenly at mealtime and announce that your committee is around a speaker-phone may feel to the minister like an interrogation in a dark room. Some ministers will have the poise to handle the challenge well, but few will think better of you for it.

The first rule in any interview is to negotiate the format. A phone call in advance to ascertain the minister's preferences goes far to ensure that your prospect feels relaxed and prepared to give you a good interview.

If you wish to include the whole committee in a phone interview, it probably is best to designate one or two members to do all the talking. Others can contribute questions and hear the answers. Another way is to have several individual phone interviews with reports to the whole committee.

Videotapes

Q: Why don't more ministers include a videotape with their packet?

A: Most videotapes make the ministers in them look bad and sound worse. Seriously, a committee that needs a video or audiotape to decide whether to interview a minister probably needs to stiffen its spine and make some decisions. Even the most professional tape is quite different from a "live" encounter — and truly professional tapes are expensive. If you are serious enough to need a tape, you probably are serious enough to want a live interview.

Questions from ministers

Ministerial intelligence

Q: I want to learn everything I can about a number of congregations, but I don't want to violate the rules. What are the limits?

A: There are very few limits, nor should there be. You need to learn everything you can. Thus you can—you are encouraged!—to speak with all living ministers who have served the congregation, including all interim ministers up to and including the incumbent; the current and previous District Executives; other ministers in the chapter; and the Transitions Director. And don't forget the congregation's website. The only persons who are out of bounds are current members of the congregation who are not on the search committee.

Track switching

Q: I am a parish minister. Can I apply for a position in religious education?

A: Parish ministers, ministers of religious education, and community ministers—all ministers—are free to seek any position in ministry.

Part-time ministry

Q: I am a minister interested in serving on a less-than-full-time basis. How should I proceed?

A: Many congregations offering part-time ministry positions work with the District Executive, and some post a Congregational Record, as well. You should file your Ministerial Record and Application for Ministry Position with the Transitions Office, and also be in touch with the DE of districts where you might like to serve. Notice, however, that UUA publications do not use the term "part-time minister." A congregation's minister is its minister, whatever the hours worked.

Questions from both ministers and search committees

Offer and acceptance of candidacy

Q: How soon can a committee offer its candidacy to a minister, and how soon can a minister accept?

A: Search Committees are asked to refrain from making an offer of a candidacy until March 15, unless the committee and all its pre-candidates have earlier completed all their pre-candidating weekends. Ministers are asked to refrain from accepting a candidacy until the same date, unless they have earlier completed all their pre-candidating weekends. With both sides abiding by this request, no search committee and no minister will be forced or even asked to reach a decision before they have had the opportunity to consider all the options before them.

Communicating with the Transitions Office

Q: What is the best way to get a question answered or to voice a concern?

A: The Transitions Director and the Transitions Administrator live and die by e-mail. The Assistant is widely knowledgeable, and gives trustworthy counsel. Due to travel and meetings, the Director's plate can get pretty full, requiring as much as a week's wait for a response to a complex question. (Note, too, that the UUA is closed for the long Christmas break.)

The Transitions Office has sought to address this problem by putting all possible information on-line, so that ministers and committees can find the answers themselves. If, however, you must reach the Transitions Director, please make a telephone appointment through the Transitions Administrator. The Transitions Director will call you at the appointed time.

In an emergency, the Transitions Director or another member of the Ministry and Professional Leadership professional staff is always accessible within a few hours.

How to complain or praise

Q: How can I complain about or show appreciation of the Transitions Office or the settlement process?

A: Any minister or layperson with a complaint is encouraged to take it up immediately with the person who inspired it. The next step would be to speak to that person's supervisor: for an MSR that is the Transitions Director; for the Transitions Director it is the Director of the Ministry and Professional Leadership Staff Group.

If the concern is about broader matters of policy or principle, it is appropriate to bring these to the Settlement Working Group of the Ministerial Fellowship Committee. The MFC has oversight of the settlement process and makes rules to govern it, subject to the approval of the UUA Board of Trustees. Communications to the Working Group should be addressed to the Director of the Staff Group, who serves as Executive Secretary of the MFC.

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Glossary

- APF** - Annual Program Fund, to which congregations contribute their annual financial support of the UUA; Fair Share means that the congregation contributes at least the recommended dollar amount per member (or recommended percentage of budget for large congregations)
- BCT** – Beyond Categorical Thinking, the workshop offered to congregations in search to address issues of discrimination in the calling of ministers
- CR** – Congregational Record, the on-line form in which congregations provide preliminary information to ministers in search
- DCC** – District Compensation Consultant, the district-based resource volunteer trained in the compensation of ministers and church staff, whose services are provided by the Office of Church Staff Finance
- DE** – District Executive, also known as District Staff, District Consultant, etc.; the District staff person who is jointly employed by the UUA and the District to provide congregational services
- DRE** – Director of Religious Education, a generally non-ordained person who is employed by a congregation to oversee all or part of their religious education program
- FICA** – Social Security tax for employees, a deduction of 7.65% from pay that is matched by the employer; contrast with SECA, the tax on ministers (and self-employed persons) which is 15.3% of salary plus housing allowance
- GA** – General Assembly, the annual meeting of the UUA
- MFC** – Ministerial Fellowship Committee, the UUA Board-appointed body that has jurisdiction over ministerial fellowship
- MR** – Ministerial Record, the on-line form in which ministers provide preliminary information to search committees of their choosing
- MRE** – Minister of Religious Education, a minister who has special credentials in lifespan religious education
- MSR** – Ministerial Settlement Representative, the district-based resource volunteer trained in the overall settlement process, whose services are provided by the Transitions Office
- OCSF** – Office of Church Staff Finances, the office in the UUA that oversees the insurance and pension programs of the UUA and advises congregations on all compensation issues for ministers and church staff
- S&H** – Salary plus Housing Allowance, the amount of the minister’s compensation that is most readily equivalent to other persons’ salaries (does not include any amount for benefits or expenses of the position)
- SECA** – see FICA above
- TCM** – Total Cost of Ministry, the term formerly used to designate the total amount provided to or for the use of ministers; includes salary plus housing allowance, contribution in lieu of FICA, retirement plan contributions, insurance premiums, and professional expenses
- UUA** – Unitarian Universalist Association
- UUMA** – Unitarian Universalist Ministers Association