



# **Transitional Ministry Handbook**

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# Introduction to the Handbook

The Transitional Ministry Handbook is an all-encompassing guide to ministerial transitions. Some materials are meant for congregations; others are meant for ministers. Some materials are for regional staff, coaches, and those simply wishing to learn more.

If you are a congregant reading these materials, you most likely are facing a ministerial transition of some kind. Whether it is imminent or sometime in the future, whether it is the departure of a long-term minister or a search for your first minister, whether it is a gentle departure or a troubled one, we expect you will find information and suggestions here to assist you during this transitional time.

For ministers, this handbook will help you understand the process of transitional ministry, and the guidance offered and practices followed by the UUA Transitions Office and Regional Staff. You will also be able to learn about applying for an interim position and about the Accredited Interim Ministry (AIM) program for ministers who feel called to interim ministry.

## Using the Handbook

There are two versions of the Transitional Ministry Handbook. One is PDF file of all materials. The other is a collection of links for quick access for specific questions. Congregations and ministers in transition may want to see the entire manual or refer to a quick links version for faster access, as needed. While forms are in both the PDF and the easy-to-find link versions of the Transitional Ministry Handbook, the forms in the PDF file are there for reference only; the versions in the easy-to-find link version should actually be used.

If some materials may seem repetitious, remember that this is intentional so the user may find all of their information in a few clicks, rather than scouring the entire handbook.

We hope the information provided here is educational, guiding, thought-provoking, and anxiety-reducing for each reader. May this handbook help you to cope with the natural anxiety a transition produces and to understand the big and small picture of ministerial transitions.

# Transitions in Ministry: Departures

## **All ministries will end.**

We don't often know when and how ministries will end. Sometimes they end because of retirement, death, illness or disability. Often the minister and/or congregation know it's time for something else. Sometimes the ending is a surprise, and, at times, an unpleasant surprise.

At the start of most ministries, rarely do the minister, staff, or congregation think about the ending that will inevitably come. Whatever qualities a ministry may have, nothing will shape its impact more than how the ministry ends and the perceptions of that ending. Harsh words can undo a successful ministry. Bad boundaries around leaving have tarnished good ministries and the reputations of congregations and ministers alike. A good ending may go unnoticed, at the time, but it may enhance the ministry and its impact on all involved. Too deep of an imprint (whether negative or positive) may last and affect future ministries.

## **Leaving Well**

How a ministry ends affects, not only how the ministry is remembered and regarded, but also subsequent ministries. Knowing how to end a ministry is not a skill ministers or lay leaders are taught. Timing and tone matter. In general, there seems to be less anxiety in both congregation and minister(s), when the departure is announced four to six months before the actual end date. Longer-anticipated departures can be frustrating for the minister and congregation, as often any work happening within the congregation goes on "pause." Shorter endings can lead to greater congregational anxiety which will affect the congregation for some time. This may still be the better path, given other options.

In figuring out when to leave, we recommend ministers talk with colleagues, regional staff, and the Transitions Office about timing, message, and process. Many ministers initiate this thinking and these conversations far too late. Congregational leaders should speak directly with the minister with questions first, then talk with regional staff and the Transitions Office for additional support.

Endings should focus on celebrating accomplishments, expressions of gratitude, and saying good-bye in a way that will be remembered with satisfaction. Once the announcement of an ending has been made, it is rare, and even inadvisable, that some new project be attempted by the departing minister.

Negotiated endings can be traumatic. Outside support from regional staff, colleagues, and the Transitions Office is strongly suggested here. The civil ending to a ministry is encouraged. Conflicted endings lead to greater mistrust within the congregation and toward ministry. Congregations with conflicted endings may develop a negative reputation. For both the congregation and minister, finding a good match in the next attempted settlement is often very difficult. The requirement for some sort of non-disclosure agreement in a very conflicted ending often leads to more trauma and distrust. This practice is strongly discouraged.

In a good ending with healthy boundaries:

- Congregants should understand that the departure of minister(s) must include, and therefore create, space for the next ministry.
- Ministers are asked to covenant with one another about appropriate boundaries following a departure.
- Every minister and congregant should be aware (or made aware) that departing ministers are expected to follow the guidelines set forth and agreed upon by the UU Ministers' Association and the subsequent covenant between new and departed minister.
- Ministers' spouses are not under guidelines but congregational leadership and ministers should know that ongoing relationships with former ministers' spouses have been a source of tension, in some cases. If the ministers' spouse remains in the congregation, incoming ministers and spouses would do well to covenant to speak directly to one another and not be critical of the other in conversation with congregants.

An important practice is the conducting of an exit interview with both church leadership and the departing minister(s). Someone on behalf of regional staff usually conducts these interviews. These interviews allow for the appropriate pastoral transition for both congregation and minister, allowing both to move forward with understanding of the accomplishments and struggles of the shared ministry. The information perceptions gathered are helpful to subsequent ministers who serve the congregation. They also provide needed insight into the future needs of the minister and congregation to regional staff and the Transitions Office. These documents are not shared beyond that small circle.

### **Knowing When to End a Ministry**

The best timing for the end of a ministry is rarely easy to identify. Most ministers consider this timing for a while before realizing that it is time for the ministry to end. Often, ministers reach out to trusted colleagues, family, and friends as thought partners.

These questions may be of help to a minister(s) facing this decision:

- Are there shared common passions that make the ministry worthwhile and vibrant?
- Is there an abiding deep concern for the well-being of the other?
- Is there mutual respect and trust?
- Can I still be the minister to congregants who I find myself in disagreement with?
- Are my concerns heard and discussed by the governing board?
- Can I still take care of myself, do the expected (and reasonable) role of my ministry, and not expect the congregation to take care of me?

A negative response to one or more of these questions indicates a need for careful reflection by the minister(s). It is best for the minister(s)—and the ministry—if the minister(s) realizes that the ministry should end before the congregation does.

Ideally, a ministry ends when there can be mutual gratitude for the ministry, a feeling that the ministry served the congregation and minister well. This is not always the case.

### **Expected Behavior from Departing Ministers**

Leaving well is an act of ministry. It is a time of reflecting on the accomplishments and learnings of the ministry, of expressing gratitude for the opportunity, and of assuring the congregation that they will move to a new future, most often with a new ministry. The scope of ministry lessens to a focus on preaching, pastoral care, one-on-one conversations as requested by congregants, appropriate staff supervision, abiding by the covenant(s) in place, readying information for the next minister, and setting boundaries around their role with the congregation once the ministry has concluded.

This can be complicated if the ministry was difficult for the minister and/or congregation, and perhaps even required a negotiated ending. Ministers (and congregations) should work with extra diligence in these moments to avoid doing harm by engaging with civility, honoring their contract, and following UUMA guidelines.

A complicated ending is not a time for vindication or admonishment. Some ministers have felt a need to instruct the congregation on better behavior and engage in what they consider to be “intense truth-telling.” Historically, this has only antagonized the congregation and created bad feelings and a wider divide between minister and congregation. Intense reactions to the ending have led to angry explosions, bullying, and disparaging remarks—none of which are appropriate behaviors.

Ministers are expected to honor their contracts, engage in an exit interview, and, if the ending was difficult, engage in a time of reflection overseen by the UUA’s Transitions Director.

### **Expected Behavior from Congregations when a Minister Departs**

Congregations experiencing the departure of a minister should focus on ending the ministry well, honoring the contract, expressing gratitude for the ministry, and reflecting on the accomplishments of the ministry.

Congregational leaders will engage in an exit interview from the region as part of the process. The interview is an opportunity to reflect and move toward a new time in the congregation’s life.

Congregations face the complicated task of allowing the current ministry to conclude while, at the same time, preparing for the next ministry. The minister(s) still should be seen as the congregation’s minister(s) until the last day of the contract. Congregational leadership should be in partnership with the current minister about appropriate steps when the next minister(s) is known. Congregational leadership should work with the current minister to define appropriate expectations and relationships once the current minister departs.

When the ending is complicated, congregational leadership should exercise particular diligence in co-creating as good an ending as possible. Civility, good manners, and fairness are expected of all members, and congregational leaders may have to exercise their leadership to encourage these. Like the similar expectation of ministers, this is not the time for the congregation, or more likely a congregant, to engage in antagonism, “intense truth-telling,” condescending instruction, or bullying with the departing minister(s).

Even celebrated and appreciated endings can have complications. There is a difference between appreciation for a ministry and venerating a “ghost”—a departing minister whose influence creates a standard that cannot be replicated and/or creates expectations that the next ministry must be exactly the same. Leaders will do well to reinforce the reality that the next ministry will be different and should be different than the current ministry, even if the current ministry is dearly beloved.

### **Kinds of Ministerial Departures**

Not all ministry endings are the same. Each of these examples of how a ministry may end has a distinct effect on a congregation: death, disability or illness, negotiated endings, misconduct, retirement, ministers moving to a new position within or outside of parish ministry, or even ministers taking a year off.

All endings of ministry bring feelings of grief, loss, and relief of varying degrees to members of a congregation. No congregation feels one thing in the same way at the end of a ministry, and congregations do well to honor disparate feelings, rather than forcing a label or groupthink onto the congregation.

#### Death

The death of a minister serving a congregation amplifies typical grief and loss at the end of the ministry. Some members may feel guilt if they wanted the ministry to end and then the minister dies. Congregations will most often need a strong pastoral ministry to follow, whether they say this or not. Both the congregation and the family of the minister are strongly urged to rely on the UUA as a source of support.

#### Disability/Illness

An illness or disability that results in the end of a ministry will also amplify feelings at the end of the ministry. Seeing ministers in decline may be hard on a congregation. Ministers with a new debilitating disability or illness should confer with their doctors, colleagues, and the UUA about their limits, their future, use of employment benefits, and options. All should note the difference between ministers exercising good self-care and being taken care of to the point of not being seen as minister. Of special note to congregations that choose not to offer long-term disability benefits: this can be a time of great guilt and frustration for the congregation.

#### Minister leaves for a new congregational ministry position

Ministers often leave for a new congregational position, though sometimes the timing can surprise a congregation. A shorter than expected tenure can cause a congregation to question itself. A longer than expected tenure can cause frustration for a congregation and guilt for ministers, who, only when leaving, realize the ministry might have been better ended a year or

two before. Settled ministries lasting less than four years often have significant detrimental impact on a congregation, both emotionally and financially.

#### Minister leaves for a new non-congregational ministry position

Often ministers discover their preferred ministry lies outside of a congregational setting. They may feel their work with a particular congregation has run its needed course and are unable to move to a new congregation. They may need more traditional work hours to meet family needs. There may be some combination of these reasons or other reasons. The effects of these moves are often the most easily understood by a congregation, though grief, loss, and relief will still be apparent. Some congregants may also feel the loss of what might have been; of the opportunity and future they hoped this ministry would create.

#### Minister leaves ministry for other work

A minister may discover ministry is not their calling, or may, due to geography or other conditions, seek a different kind of work. This may be particularly hard on the minister who has spent a lot of time and money in preparation for ministry. This may leave the congregation wondering how they might have contributed to the ministers' decision. Again, the feelings of grief, loss, and relief may be related to what the ministry was and also what it might have been.

#### Minister leaves ministry resulting from ministerial misconduct

The impact of ministerial misconduct is often traumatic. More often than not, there is a divide in the congregation and sides are taken. The minister may not understand the nature of the misconduct, which can lead to more confusion for everyone. Blame is often a significant part of congregational life, both turned inward and outward. Trust has been violated and will be slow to rebuild. Feelings are likely to run deep, strong, and long. At its worst, the congregation no longer understands what ministry is and is supposed to be. Future ministries will need to focus on building trust, abiding by covenant, moving slowly, and ending well. Sometimes, if there are repeated instances of misconduct, it will take multiple ministries for trust in ministry to return.

Three notes:

1. Examples of misconduct include sexual, financial, emotional (e.g., bullying).
2. Misconduct is not limited to members. Staff members', even congregants', engage in misconduct. This has strong effects on congregations, as well.
3. Unnamed misconduct in a congregation's past has a profound impact on a congregation, perhaps even more profound than named misconduct.

#### Minister negotiated out of congregation

Negotiated endings are particularly hard on both congregation and minister. This type of ending is often a result of some unresolved conflict that has festered and amplified (sometimes from only a small but powerful group or member of a congregation). The ending can catch many members and even the minister by surprise. Often the desire to keep details quiet around the conflict inhibit the healing for both congregation and minister. Negotiated endings can lead to congregational division, secrets, blaming, and misinformation. The effects can be long-lasting unless both minister and congregation can eventually respond to these three questions with empathy and the ability to take other perspectives into account.

Three questions for both congregation and minister:

1. What happened?
2. What happened to the congregation?
3. What happened to the minister?

Trust must often be repaired and rebuilt after a negotiated resignation. Learning must occur for both minister and congregation to avoid repeating patterns. Ministers must remember they must minister to the entire congregation. Congregations must remember the minister has opinions and still must minister to everyone in the congregation. Not all negotiated endings are a result of misconduct. Congregations with a history of misconduct, especially unspoken or unknown misconduct, seem more likely to have negotiated endings than those with no history of misconduct. Often, the negotiated ending amplifies feelings of grief, loss, and relief. The feelings of the loss of opportunity are often more present than the feelings of loss for the ministry ending.

#### Ministers who retire

Retirement is often the most celebrated ending and is often harder for the minister than the congregation. Frequently, the congregation is expecting the retirement and is simply waiting for the minister to announce. If the ministry has lasted a long time, it may be harder for both minister and congregation to really move toward a new future. Ministers may have a difficult time seeing themselves not serving a congregation or being in the same relationship with congregants that they have had. This may also be true for congregants. The feelings of loss and grief are about the loss of the familiar and a move toward the unknown, even though this was inevitable. It is important that both minister and congregation understand that the minister, once retired, is no longer the minister of the congregation, and that a new set of relationships must be negotiated.

# Exit Interview Process

**The ending of a ministry is an opportunity for reflection and learning.** Congregational leadership, ministers, and regional staff all have the opportunity (and should take advantage of the opportunity) to take some time to reflect and assess the ministry at its end. This is not an evaluation solely of the minister, but also is a reflection on the ministry of the congregation during this minister's tenure.

**The exit interview process is intentionally both pastoral and educational.** Congregations and the minister both have chances to share information, insights, and feelings about the ministry they shared together from their unique perspectives. Not everyone in the congregation will have the same reflections and opinions. This is not only normal, but it is an opportunity.

**The process is overseen by the region.** A regional staff member oversees the process and is encouraged to share any insights they have as well. The interviews are shared only with the outgoing minister, congregational leadership, regional staff, the assigned regional transitions coach, the UUA's Transitions Office, and, if requested, the incoming interim and settled minister.

**An interview will be conducted with the outgoing minister. Another interview will be conducted with the congregational board.** The regional staff will then oversee the write-up of the interview and its subsequent dissemination. Both leadership and minister are encouraged to share what worked well and what each wish they had gone better or produced a different outcome. In some cases, the regional staff may also interview congregational staff.

## Exit Interviews

1. Exit interviews will be conducted at the end of all settled ministries and all second ministry positions.
2. Exit interviews may be requested at the end of an interim, developmental, and other contract ministries by the Transitions Director (most likely in the case of negotiated endings).
3. The exit interviews will be completed within 3 months of the announced departure date (ideally 6-8 weeks) of the ministry. If this is not possible, the regional staff will inform the Transitions Office of the reasons for the delay.
4. The exit interviews are to be shared between the congregational leadership and departing minister, the regional UUA staff, the assigned transition coach, and the UUA Transitions Office. They can also be shared with the following interim and settled minister upon request. *This is a change from previous policy where sharing was optional. It is no longer optional.*
5. Exceptions to the above rules must be agreed to between the regional staff and the Transitions Director.

## **Sample Ministerial Exit Interview**

*(To be done with the departing minister of the congregation by a member of the Congregational Life Staff, Regional Transitions Coaching (RTC) Team or designee) Look in the Forms Section for a Word Document Copy usable for interviews.*

### **Introduction**

This interview is a tool for reflection and increasing self-awareness of the minister and for providing another lens about the congregation being served at the end of this ministry.

The Region will provide written copies of the report to the minister, the governing board of the congregation, and the Ministerial Transitions Office of the UUA. A copy should be kept for regional files.

The Region will also share the report with the interim minister(s), and the newly settled minister(s).

The Exit Interview provides an occasion for a representative of the UUA to check in with the minister to establish whether the minister has:

- Been in contact with the Transitions Office
- Connected or will connect with supportive colleagues
- Reviewed UUMA guidelines if they are staying in the area

<b>Date of interview:</b>	
<b>Congregation:</b>	
<b>City &amp; State/Province:</b>	
<b>Name of departing minister(s):</b>	
<b>Date of minister's departure:</b>	
<b>Name of interviewer:</b>	

1. What were the positive achievements of the minister and the congregation during your common ministry?

You can type in narrative form – space will EXPAND

- Or add lists

2. What were the most challenging times during your common ministry and why?

3. If you were to do something differently (knowing what you know now) during this ministry, what would it be?

4. What is something undone that you wish you had accomplished together?

5. How did the minister support the growth of the leaders and develop the gifts of the congregation?

6. How did the congregation support the growth of the minister in the development of their gifts?

7. Why are you leaving?

8. How is the congregation reacting to your departure?

9. What are/were your unspoken expectations of the congregation?

10. What is the history of this congregation's relationship to ministers? How do the length of their tenures compare?

11. How did the minister, other staff, and lay leadership share in the ministry/work of the congregation?

12. What is the greatest strength of the staff team? Challenge?

13. What have you learned about yourself as a minister during this settlement?

14. How would you describe the culture of this congregation?

15. How well did you fit with the culture of the congregation?

16. How did the culture of the congregation shift during this ministry?  
(e.g. intercultural development, social justice, generosity (money and spiritual), faith development, grounding in UU theology/history, associational connections, etc.)

17. How does the congregation set boundaries on inappropriate behavior?

18. When there were disagreement or conflicts, in what ways did the minister, the members and/or leaders engage with the conflict? Did the parties in the conflict acknowledge or take responsibility for their part?

19. Is there anything in here discussed that the congregation doesn't probably already know?

20. Is there a question you'd like to be asked, but weren't in this interview?

## **Sample Congregational Transition Interview**

*(To be done with the lay leadership of the congregation by a member of the Congregational Life Staff, Regional Transitions Coaching (RTC) Team or designee)*

### **Introduction**

This interview is a tool for reflection and increasing self-awareness of the congregation at the end of this ministry.

The Region will provide written copies of the report to the board chair (or designee), the departing minister, the Ministerial Transitions Office of the UUA. A copy should be kept for regional files.

The Region will also share the report with the interim minister(s), and the newly settled minister(s).

The Transition Interview provides an occasion for a representative of the region to check in with the leadership of the congregation. It is a good time to establish whether:

- the congregation has checked whether it is in compliance with its by-laws regarding such matters as termination, call, and committee on ministry, and whether its by-laws serve them well (experience of field staff and the Transitions Director, for example, suggests that a call of a minister should require at least a 90% vote and for dismissal 30% should be sufficient),
- the congregation has thoughtfully considered the appropriate pace for its search process,
- the congregation understands the roles of the Regional Transitions Coach and the Compensation Consultant and has made provision to meet with them at the appropriate point in its process, and/or
- the congregation needs any other assistance.

<b>Date of interview:</b>	
<b>Congregation:</b>	
<b>City &amp; State/Province:</b>	
<b>Name of departing minister(s):</b>	
<b>Date of minister's departure:</b>	
<b>Name of interviewer:</b>	
<b>Board chair or alternate contact person:</b>	
<b>Email:</b>	
<b>Phone:</b>	
<b>Number of persons participating:</b>	
<b>Name of each participant and their role in leadership (list):</b>	

1. What were the positive achievements of the minister and the congregation during your common ministry?

You can type in narrative form – the space with EXPAND

- Or add lists

2. What were the most challenging times during your common ministry and why?

3. If you were to do something differently (knowing what you know now) during this ministry, what would it be?

4. What is something undone that you wish you had accomplished together?

5. How did the minister support the growth of the leaders and develop the gifts of the congregation?

6. How did the congregation support the growth of the minister in the development of their gifts?

7. Why is the minister leaving?

8. How is the congregation reacting to the minister's departure?

9. What are/were your unspoken expectations of the minister?

10. What is the history of this congregation's relationship to ministers? How do the length of their tenures compare?

11. How did the minister, other staff, and lay leadership share in the ministry/work of the congregation?

12. What is the greatest strength of the staff team? Challenge?

13. What has the congregation learned about itself during this settlement?

14. How would you describe the culture of this congregation?

15. How well did the minister fit with the culture of the congregation?

16. How did the culture of the congregation shift during this ministry?  
(e.g. intercultural development, social justice, generosity (money and spiritual), faith development, grounding in UU theology/history, associational connections, etc.)

17. How does the congregation set boundaries on inappropriate behavior?

18. When there were disagreement or conflicts, in what ways did the minister, the members and/or leaders engage with the conflict? Did the parties in the conflict acknowledge or take responsibility for their part?

[Empty text box]

19. Is there anything in here discussed that the minister doesn't probably already know?

[Empty text box]

20. Is there a question you'd like to be asked, but weren't in this interview?

[Empty text box]

# Exit Interview (Regional Staff use)

## Ministerial Transitions Regional Staff Report

Regional staff are asked to share information from their lens that will help the congregation. Based on the delicate nature that may be required in some situations, regional staff can request confidentiality on all but the last two questions if needed, though the more information that can be shared with both the congregation and minister will be helpful to all.

### Questions

1. What went well during this ministry?
2. What didn't go well?
3. What kind of minister would be a good fit for this congregation?
4. How has the congregation changed as a result of this ministry?
5. Is there a place/behavior the congregation is stuck either in a rut or in the past?
6. How well is the congregation connected to the larger movement? To the wider community?

### For public consumption:

1. What three or four things would you tell the congregation they need to focus attention on during the interim ministry?
2. What are one to two hopes you have for this congregation?

# Negotiated Endings, Complicated Endings, Review, Hold, and Settlement Restrictions

1. A negotiated ending from any type of ministry puts a minister on a temporary hold for settlement until the minister has completed the Review Team Assessment which includes a reflective essay from the minister, completed congregational and ministerial exit interviews, and additional information from regional staff. We also may ask of this of a minister where the ending was not defined as negotiated but known to be complicated, particularly one where the minister may bring the baggage of the last ministry into their next ministry.
2. The minister has up to three years from the end date of the ministry to complete the essay before they are referred to the Ministerial Fellowship Committee for a fellowship review.
3. Upon completion of the active ministry, receipt of the reflective essay and exit interviews plus information from regional staff, the Review Team will determine the minister's future readiness for parish ministry. The Review Team consists of the Director of Ministry and Professional Development, the Transitions Director, the Professional Developmental Director, and the Director of Congregational Life.
4. The Review Team may decide to keep the minister on hold pending further ministerial development, place on settlement restrictions (overseen by the Transitions Office), or released to any kind of parish ministry. Self-reflection, self-awareness, emotional intelligence, responsibility for one's actions, and potential to not place one's self in a similar situation are all factors which will be evaluated.
5. "On Hold" means the minister is prohibited from having their record shared with a congregation for any contracted parish ministry. Hold decisions of the Review Team may be appealed by the minister to the Ministerial Fellowship Committee for a Fellowship Review.
6. "Settlement Restriction" means the minister may be considered for certain parish ministry settings with the oversight of the Transitions Director. These restrictions can include, but are not limited to, setting, duration, percentage of full-time, required mentorship, continuing education, and therapy. Settlement restrictions may be lifted at any point by the Transitions Director.

# What is Transitional Ministry?

All ministry is transitional. All ministries have a beginning and end, though people tend to not think about that, especially during settled ministries.

Yet in a more practical sense, transitional ministry covers the time when a congregation is under intentional transition from one ministry to the next. Most people think of interim ministry as transitional ministry, and it is that. A congregation moves from one settled ministry to its next settled ministry with the help of an interim minister, who assists the congregation on this journey.

Some congregations need longer than a typical interim ministry to work on deep-seated issues and patterns that have kept the congregation circling in place or heading in a negative direction. There are very specific issues to be worked on in an intentional way. The congregation knows it needs help. Significant trauma may be a part of the congregation's history which has been ignored or downplayed, or, in some cases, not even known. This congregation may be ready for developmental ministry, another kind of transitional ministry.

Sometimes a congregation is unsure about ministry and/or how much of it they need. The congregation decides to contract with a minister for a year, with the option to renew as the contract ends. In contract ministry, the congregation often has very specific duties for the minister. Sometimes the congregation is using this as a test period—to see whether the shared ministry is good, and to provide for the basics of ministry while the congregation assesses its needs. Usually these are limited in scope and are most often seen in less than full-time ministry.

Any ministry less than  $\frac{3}{4}$  time is officially considered a contract ministry by the Transitions Office. While congregations often call the ministry by another name, the rules for contract ministry apply to these part-time ministries (which actually tend to have more flexibility than other ministries). Contract ministry, unlike developmental and interim ministry, may lead to a call and a settled position.

## An Introduction to Each Type of Ministry

**Interim**—a transitional ministry, most commonly seen to help a congregation move from one settled ministry to the next settled ministry. Most often the duration is 24 months, though occasionally the ministry may be longer or shorter. The interim minister(s) assists the congregation in moving beyond its last ministry and equipping itself for a new, different ministry. This preparation involves helping the congregation look at practices that may or may not be serving them well, assisting through the emotional process of transition, setting sights forward, and connecting the congregation to needed resources. The interim minister is hired by the board of trustees. Interim ministers may not be called the congregation. Most congregations looking for  $\frac{3}{4}$  time or more ministry use this option for their transition.

**Contract**—often used by a congregation that is seeking less than  $\frac{3}{4}$  time ministry, or that is uncertain that other types of ministry are a fit. The minister(s) is contracted for a specific period of time, most often for a year with a list of specific tasks, like preaching and pastoral care, though it may include more tasks, depending on the percentage of time. Not all ministry tasks will be covered. Contracts may be renewed and modified. Contract ministers are hired by the board. They may be called by the congregation, generally after a period of several years.

**Developmental**—is an option for congregations with a history of repeated short ministries or chronic conflict. They exhibit a need to make systematic change, and/or a general inability to thrive, AND a desire to make serious changes to remediate these issues.

Developmental Ministry is a cooperative program between Congregational Life (CL) Staff and the Transitions Director. These UUA staff colleagues work with a congregation to identify the deeper issues underlying the recurring symptoms of burnout, inadequate financing, low volunteer satisfaction, ministerial turn-over, or conflict. Congregations may ask for developmental ministry as they recognize their troubling situation, or developmental ministry may be recommended by an interim minister or by CL staff. The congregation works with CL staff during a transition to prepare for developmental ministry and the congregation must be recommended by CL staff and Transitions Director before they enter the program. During a developmental ministry, the congregation and minister work collaboratively with CL staff and the UUA to increase the odds of realizing the deep change sought by the congregation.

Developmental ministries have been most successful with a 4-7 year contract with the board. The developmental minister is not a possible candidate for the called ministry of the congregation. The developmental minister companions the congregation in their next search for a settled minister. It is understood that after this significant work in the congregation, there is no desire to have an interim challenge or shift the culture the congregation is striving to maintain.

**Settled**—this minister is called by the congregation after a search. Ministers in search for a settled ministry are rarely interested in following a settled ministry without some sort of transitional ministry. This is mentioned here as a transitional option only for congregations where an assistant/associate minister may succeed the current senior minister. In general, the senior minister has worked with the congregational leadership and the second minister on a succession plan. Even then, outside help can be invaluable. Settled ministry is of an unlimited duration, but both minister and congregation would do well to remember that this ministry will end.

# What Type of Ministry Next—Interim, Contract, Developmental, or Settled?

## Interim Ministry

### When it works:

- Most congregations opt for an interim minister.
- They serve most congregations well, even, sometimes, when the congregation thinks the interim has not. Frustrations within the congregation often come out at the next minister in a variety of ways. When these frustrations are directed at the new settled minister, shorter ministries ensue. It is better to use an interim time to deal with these frustrations than to unintentionally create an interim minister out of the newly settled minister.
- Additionally, congregations may have areas of neglect and/or ruts they've fallen into that need attention. The interim helps the congregation refocus to improve the odds of a successful settled ministry.
- Following a particularly traumatic, intense, or surprising ending, an interim can work with the congregation to bring stability, reflection, and openness to a new future.

### When it doesn't work:

- An extremely divided and conflicted congregation may not trust any minister to do more than preaching and limited pastoral care. These congregations may be better served with a contract minister.
- Congregations seeking less than  $\frac{3}{4}$  time ministry are served with a contract ministry, though this may involve interim work.

### Reminders:

- You can always talk to the regional staff and Transitions Office about this decision.
- If a congregation had a particularly anxious time with a previous interim minister, they are probably better served by clearly stating what didn't work with that interim ministry in their search materials, than thinking interim ministry is the problem. Like snowflakes and settled ministers, no two interims are alike.
- Interim ministers cannot become the settled minister.

### Ministerial Pool Available:

- Usually fairly large, though issues of compensation, geography, and a congregation's willingness to do interim work can affect interest.

## **Contract Ministry**

### When it works:

- This is the best solution for congregations seeking less than  $\frac{3}{4}$  time ministry.
- This can also be for congregations needing to rebuild trust in ministry and a one year shorter term ministry is needed.

### When it doesn't work:

- When the expectations don't match what is stated in the contract.
- When the minister works more than the allotted time contracted with the congregation (working full-time at half-time compensation).
- When the congregation is trying to intentionally avoid needed interim work.

### Reminders:

- You can always talk to the regional staff and Transitions Office about this decision.
- The more specific the contract the better. Clarity helps manage expectations.
- Contracts may be renewed. A contract minister may be called.

### Ministerial Pool Available:

- Small, especially outside of major metropolitan areas, and if part-time. Most of the time, the available contract ministers are local.

## **Developmental Ministry**

### When it Works:

- When the congregation knows it has significant issues to work through, often chronic ones. Usually the congregation has worked with the regional staff and/or current minister (almost always an interim minister) to see the need for significant learning and change.

### When it doesn't work:

- When the congregation isn't serious or committed to working on its goals.
- When the congregational buy-in to this type of ministry has not been attained.

- When the congregation expects the minister to do all the work.

#### Reminders:

- You can always talk to the regional staff and Transitions Office about this decision. In this case, it's a must.
- The developmental minister isn't there to fix the congregation. The developmental minister is there to assist the congregation in achieving its goals.
- The developmental minister may not be called. Developmental ministry precedes the search for a called minister.

#### Ministerial Pool Available:

- Intentionally small. Often the Transitions Office actively recruits specific ministers to meet the congregation's stated goals. The overall pool of ministers interested in this, while growing, is smaller than interim or settled ministers.

## **Settled Ministry**

#### When it Works:

- After an interim or developmental ministry period.

#### When it doesn't Work:

- Almost in every other situation. Going directly from one settled ministry to the next is not recommended unless there has been an assistant minister groomed to succeed a senior minister.

#### Reminders:

- You can always talk to the regional staff and Transitions Office about this decision.
- Going directly from one settled ministry to another is often perceived by others as a quick fix—an attempt to avoid something and that ministers are interchangeable without unique gifts.
- This is more likely to produce a short settled ministry.

#### Ministerial Pool Available:

- Small, unless the congregation has extremely good compensation. The settled to settled ministry option makes potential settled ministers very wary.

# Interim Ministry Overview

## Overview of Interim Search Process

- The search for an interim minister takes place in April and May of each year for a July or August start.
- Congregations may request the Transitions Office initiate a search for an interim minister in the MinistrySearch system (<https://ministrysearch.uua.org>) as of February 1 for the year in search. Such requests should be submitted through email ([transitions@uua.org](mailto:transitions@uua.org)). Congregations seeking a minister at less than 75% are instructed to use the contract ministry search process.
- The selection is made in a very short time period so the interim search committee should be prepared to make this search a priority for the several weeks it normally takes to conduct it.
- We strongly recommend you read *In the Interim: Strategies for Interim Ministers and Congregations, 2<sup>nd</sup> Edition* available from the [UUA Bookstore](#), but if you are close to the April application deadline, feel free to submit your application first.
- The name of every minister who expresses an interest in your congregation will be released to you, up to 8 names.
- You may request to have a single interim minister recommended to you.
- You may choose to limit the number of names you receive (2-7 names)
- If your congregation had a difficult interim experience in the past, please arrange to speak with your regional staff or the Director of the Transitions Office. This should not deter you from searching for an interim minister, but it can shape how you search for your next, different interim minister.
- What ministers look for when reviewing an application is fair compensation and authenticity. They are most interested in a congregation which honestly expresses its challenges, successes, and needs. They want an opportunity to do real work with a congregation looking to get ready for its next settled ministry.
- All interim search committees (on behalf of their congregation) and all interim ministers must fill out the covenant to agree with each other and the Transitions Office to follow the rules of interim search: <https://uua.wufoo.com/forms/search-covenant/>

## **Covenant for Congregations Seeking Interim Ministry**

*Please enter into covenant using this form: <https://uua.wufoo.com/forms/search-covenant/>*

1. We agree to follow the rules and timelines within the Transitional Ministry Handbook and Transitions Office Website.
2. We agree to honor a minister's needs to follow the Guidelines for the UUMA (regardless of membership).
3. We agree to not to ask the interim to be a candidate for a congregation's settled position, and understand that that the interim may not apply to a position with our congregation that starts within 3 years of their last day as interim minister.
4. We agree to inform and work with the Transitions Office, Regional Staff, and regional transitions coaches throughout the transitional process.
5. We agree to complete interim progress appraisals, as required.
6. We agree to fund the training cost of the interim minister.
7. We understand that an interim minister must have a mentor (all except Accredited Interim Ministers) or collegial support system (AIMS only) during the interim ministry.
8. We understand the need for fairness throughout the search and interim period. We agree to abide by the interim search rules as well as to support interim ministry in our congregation throughout the interim period.

We, as governing board for our congregation, understand the above covenant and hereby agree to it.

(List names of board members).

## **Covenant for Ministers Seeking to Do Interim Ministry**

Please enter into covenant using this form: <https://uua.wufoo.com/forms/search-covenant/>

1. I agree to follow the rules and timelines within the Transitional Ministry Handbook and Transitions Office Website.
2. I agree to abide by the Guidelines for the UUMA (regardless of membership).
3. I agree to not be a candidate for a congregation's settled position, and will not apply to a position that starts within 3 years of my last day as interim minister.
4. I agree to inform and work with the Transitions Office, Regional Staff, and regional transitions coaches to support the congregation through the transitional process.
5. I agree to complete interim progress appraisals, as required.
6. I agree to complete the initial training of interim ministers' if I have not already done so.
7. I agree to have a mentor (all except Accredited Interim Ministers) or collegial support system (AIMS only) during the interim ministry.
8. I agree to support my interim ministry colleagues throughout the search and interim period.

I, \_\_\_\_\_, understand the above covenant and hereby agree to it

## Duration of Interim Ministry

- Congregations engaging at least a 24 month interim ministry period have a much greater success rate (90%) at calling a minister following their interim period than congregations doing only a single year of interim ministry (56%).
- The UUA recommends a two year interim for most congregations. Our mantra is “Doing it well beats doing it quickly.” Don’t be afraid to take the time you need. Over 90% of congregations do at least 24 months of interim ministry.
- Search committees have more time and seem to be more discerning and open when elected after the interim minister has arrived than during the ending of the settled ministry. Search committees need a full year to do their work well. Search committees selected after an interim minister has arrived tend to be able to look forward and are more likely to see future needs. Search committees selected while a settled minister is still serving the congregation tend to gaze backwards and are more reactive (either positively or negatively, often overly so) and less open to a new and different minister and ministry.
- It is highly recommended that congregations doing two years of interim ministry do so with the provision that the contract is one year with the option to renew for another year. Doing so allows for the possibility of a graceful exit if the interim and congregation do not match well. Additionally, some congregations are just better served by two different interims.

## How to Apply for an Interim Minister

Email the Transitions Office to initiate the Interim Search ([transitions@uua.org](mailto:transitions@uua.org)). The Transitions Office will need this information to initiate the search:

- Full name and location of congregation
- Start date (August 1 of upcoming year)
- Percentage of time
- Length of interim
- Initial contact person for interim search with email

Here is a link to the MinistrySearch System: <https://ministrysearch.uua.org>. The initial contact we put in the system may add other interim search committee members. If you want access to your information from the old settlement system, you may request your congregation’s record sheet(s) by sending an email to [transitions@uua.org](mailto:transitions@uua.org). Be sure to tell us your congregation’s full name, city, and state as well as your name and congregational role. Once your application is complete, send an email to [transitions@uua.org](mailto:transitions@uua.org) to let us know, so we may make the application available for ministers to view.

## The Application for Interim Ministry

- Fill out the application as best you can. Ideally, input is obtained from at least the entire board of trustees. Some answers may require an educated guess or estimate.
- Some information will be pre-populated from certification data turned in to the UUA from the congregation.
- The application serves your congregation best when you are truthful about your congregation’s needs during the interim time, and provide a quick assessment of your

strengths and challenges, and a snapshot of your congregation and its values. Authenticity and honesty trump putting your best foot forward. Surprises lead to resentment, bad matches, and hard feelings all the way around.

- You may make adjustments and changes to your application until the deadline (see calendar).

### **Additional Materials/Packet for Interim Search**

Your website is now a source of information. Expect potential ministers to scour it. You should also provide a packet of information to your applicants. This should include:

- a congregational budget (multiple years are even more appreciated)
- a copy of the by-laws
- covenants or policies around behavior or expectations of congregations (like a disruptive behavior policy)
- a couple of different orders of service
- several newsletters (links are fine)
- recent board minutes

If these are already housed on your website, direct the applicants to them and provide the access information needed. If they are not on your website, a collection of electronic files which can be emailed, placed in a dropbox, or transmitted in some other immediate way is fine.

- You may include incentive pieces or links about your area, such as links to your location's Chamber of Commerce, Wikipedia page, housing information, and any tourism sites.
- Ministers should have a website to share with your selection team in addition to their completed ministerial record, though a collection of electronic files can suffice for the interim process
- The minister's website (or packet) should include:
  1. a biography including a vision for Unitarian Universalism and your ministry
  2. sermons (ideally with video/audio links)
  3. other rites of passage services
  4. newsletter columns
  5. references
  6. additional photos and audio/video files are a plus.

### **How the Interim Search Works**

- There are two rounds of interim search.
- In each round, the names of ministers interested in serving as your interim are released to you through the online MinistrySearch system.
- Your interim search committee reviews the ministerial records and contacts each minister to either schedule a phone or video interview.
- To gently let the minister know, at any point, that you don't wish to pursue their application, you should dismiss them using the MinistrySearch system. The system can send them an automated message or you can write your own message within the system.
- Before the interview, you should forward your informational packet and ask each minister for their search packet or website.

- You should check references after your video interview.
- Once interviews and reference checks are concluded, we recommend you contact those ministers you are interested in to determine if they are also interested in you. This is not the time to make an offer, though. An offer may only be made at noon eastern time at the conclusion of this round of search. **See the Calendar for the specific dates for each round.**
- Let the Transitions Office know which interims you are likely to ask to be your interim (congregations and ministers provide a ranked “yes” list).

**The First Round.** The first round of the interim search is open to all ministers, though Accredited Interim Ministers have more access.

- Accredited Interim Ministers (AIMs) may have their names sent to up to 8 congregations.
- Accredited Interim Ministers in Training (AIMITs) may have their names sent up to 6 congregations.
- Ministers with at least 10 years’ experience may have their names sent up to 5 congregations.
- Ministers with less than 10 years’ experience may have their names sent up to 4 congregations.

It’s possible that not every congregation will receive names during this round, so if you don’t see any names when you log in, check in with the Transitions Office to confirm this. Every effort will be made to have the names of prospective interims available to the congregation by 5 p.m. Eastern on the first day of each round.

**The Second Round.** Any congregation without an interim will continue to the second round. This follows the same procedures as mentioned, though any minister is eligible in this round.

**After that.** Please be in contact with the Transitions Office if you still need an interim minister after the completion of the second round.

### **How to Work Through Your List of Ministers in the Interim Search**

- The interim search committee should read all ministerial records and agree on which interims to pursue (it could be all of them).
- As soon as you know you are not pursuing someone, send them a polite no thank you email through the MinistrySearch system.
- Ask for a packet exchange with the interested ministers and arrange for a phone/video interview.
- Review their materials and prepare a common set of interview questions.
- Divide the applicants up to conduct reference checks.
- Complete the interviews and agree which of the ministers you’d still pursue as interim and which you choose to dismiss.
- Check with the ministers on your “yes” list to make sure that they are still interested
- Submit the list, beginning with all your “yeses” in order of preference, to the Transitions Office. Ministers will do the same. The Transitions Office will provide specifics on timing.
- The Transitions Office will look at both congregations’ and ministers’ lists and notify congregations and ministers about which matches are likely.
- Contact the person you’d ask first at noon Eastern time on the offer day.
- If no offer will happen, then you will move to the next round and begin again.

## Compensation and Background Checks

- Please remember that interim ministers should be compensated at the same level as you would compensate a called minister. It is highly recommended that the interim minister be paid at the recommended mid-point level for the congregation's size and geindex
- When you make an offer on the final day of the search cycle, it is contingent on a successful background check as well as coming to agreement on the specifics of the offer being made.
- While you can use any company you wish to complete a background check we offer:
  - [Oxford Document Management Company](#)
  - [Church Mutual Insurance Company](#)
- A sample interim contract can be found in the Recommended Contract section (coming soon). Deviating from the recommended contract is discouraged.
- To find your congregation's geindex wage rate, please go to <https://www.uua.org/finance/compensation/program/salary-recommendations>
- To then calculate fair compensation go to <http://www.uua.org/careers/compensation/fair/178552.shtml>
- If your current minister is paid below the mid-level recommended guidelines, you should at least maintain or raise the salary to find the best interim possible.
- If your current minister is paid above the mid-level recommended guidelines, you should at least pay the mid-point, unless you are getting an interim with more experience than your current outgoing settled minister. In that case, you should match or raise the compensation.
- You should be prepared to pay full benefits in the compensation package. Please use the [Compensation Calculator](#) – this is the PDF version. Find the excel version on the [Transitions Office](#) website.

## If you have questions

- Questions about the interim search should be directed to either your regional staff or to the Transitions Office.
- Emails are easier for the Transitions Office, but you may request a phone appointment. Send an email to [transitions@uua.org](mailto:transitions@uua.org) with several suggestions of a time for a call and the nature of your questions or concerns.

## After the Contract is Signed

- Please send a copy of the signed interim contract to the Transitions Office. An electronic copy sent by email is preferred.
- Please also be sure we know the start date of the ministry so we can update the online directory for your congregation.

## **Interim Ministry Training**

- If a minister hasn't served as an interim before, they receive training from the UUA and the Interim Ministry Network in the summer prior to or just after beginning their interim service.

## **Getting Ready for the Interim Ministry/Common Read**

- Congregational leaders that prepare themselves for the interim ministry period are more likely to have a successful interim period. We recommend a common read for congregational leaders to prepare for the interim time. <http://www.uuabookstore.org/In-the-Interim-P18172.aspx>
- The MidAmerica Region has hosted some videos on ministerial transitions. They are on the right-hand side of the web page at this link: <https://midamericauua.org/services/transitions>

## The Process for Ministers Wanting to Apply to Do Interim Ministry

1. Alert the Transitions Office of your Interest in Interim Ministry ([transitions@uua.org](mailto:transitions@uua.org))
2. Complete your Ministerial Record in the MinistrySearch system (<https://ministrysearch.uua.org> )
3. Have a website ready (or at least an electronic packet, though highly less desirable) to share with potential congregations. This should include:
  - a biography including a vision for Unitarian Universalism and your ministry
  - sermons (ideally with video/audio links)
  - other rites of passage services
  - newsletter columns
  - and references.
  - additional photos and audio/video files are a plus
4. Complete the application and the interim ministry covenant for a specific interim cycle in the MinistrySearch system
5. Alert the Transitions Office that your materials are ready for congregations to view in the search process.

### Interim Ministry Training

- ✓ Ministers are not required to take interim ministry training prior to applying to be an interim minister.
- ✓ Ministers are expected to complete the initial training once they have been selected to do interim ministry by a congregation.
- ✓ The Transitions Office offers one training in conjunction with the Interim Ministry Network each August for ministers new to interim ministry.
- ✓ Every interim minister should have a mentor when starting an interim ministry.

# Becoming an Accredited Interim Minister

## Requirements for Admission

To be considered for the status of Accredited Interim Minister in Training (AIMIT), a minister must:

- be in Final Fellowship with the UUA (however, ministers in preliminary fellowship may be admitted on a case by case basis)
- demonstrate competence in worship, preaching, counseling, working with volunteers, and church administration
- have completed the Interim Ministry Network's Fundamentals of Transitional Ministry—The Work of the Leader or Transitional Ministry Orientation offered each August by the Transitions Office (or both)
- have served effectively as an interim minister for at least one full year
- exhibit appropriate personal qualities:
  - self-differentiation: personal security, emotional stability, flexibility
  - resilience and resourcefulness
  - comfort with beginnings and endings
  - the ability to listen attentively and to ask searching questions
  - patience, empathy, understanding
  - hopefulness: a positive approach to life
  - physical vitality
  - entrepreneurial energy on behalf of congregations
  - a domestic situation conducive to frequent relocation
- make required professional commitments
- to retain an AIM as a mentor, and to engage in regular conversation about interim ministry with the mentor at least monthly
- complete and submit the application and all required documents by February 1.

# Sample Application for Accredited Interim Ministry in Training (AIMIT)

*Application Deadline February 1*

*This application and supporting materials should be submitted electronically (as email attachments) and must include the following:*

- 1. This form*
- 2. Name of congregation you are currently serving as an interim minister*
- 3. The name of a regional staff person with whom you have worked.*
- 4. A letter from your mentor evaluating your potential for interim ministry.*
- 5. Copies of at least one year of interim appraisals from you and the congregation. If you have served more than one year as interim, please include up to three years of appraisals. If you cannot provide these, the Transitions Office will attempt to locate copies. Our filing system is challenging so please allow several weeks lead time when requesting copies of appraisals.*
- 6. A copy of your up-to-date Ministerial Record from the MinistrySearch system.*
- 7. A link to your website or an electronic version of your packet*
- 8. A copy of the certificate of completion of either Transitional Ministry Orientation (through the UUA) or Fundamentals of Interim Ministry (through the Interim Ministry Network.)*

Today's Date

Name

Email

Preferred Phone

Mentor's Name

Mentor Email

How long as mentor?

Does mentor have interim ministry experience?

Please list other mentors you have had and length of time as mentor

Regional Staff Name

Email

Please explain why you are interested in AIMIT status at this time.

Please explain why you feel called to interim ministry work, and express any reservations you may have about the suitability of interim work for your ministry.

Is there any other information you would like to share?

*Evaluation of your application will be conducted by the Interim Chapter Exec. and the Transitions Director. If your application is accepted, you must attend the next April AIM Chapter Meeting after which a final determination will be made whether you may be granted AIMIT status. Following the seminar, you will be notified of the decision by an email from the Transitions Director.*

*Submit your application to the Transitions Office at [transitions@uua.org](mailto:transitions@uua.org). Please submit all application materials as email attachments, using a single submission. If the files exceed the capacity of your email provider, please use [www.wetransfer.com](http://www.wetransfer.com) or a similar online service.*

# Sample Application for Accreditation as an Interim Minister (AIM)

*This application and supporting materials should be submitted electronically (as email attachments) and must include the following:*

- 1. This form*
- 2. A letter from your regional staff person you have worked with evaluating your experience as an interim minister.*
- 3. Copies of interim appraisals by you and the congregations served for the most recent three years of interim ministry. (If you cannot provide these, the Transitions Office will attempt to locate copies. Please allow several weeks lead time when requesting copies of appraisals.)*
- 4. A copy of your up-to-date Ministerial Record (as PDF) from the MinistrySearch System.*
- 5. A link to your website or an electronic copy of your interim search packet.*
- 6. Copy of certificate of completion of the [Fundamentals of Transitional Ministry: The Work of the Congregation \(FTMC\)](#) including fieldwork (through the Interim Ministry Network.)*

Today's Date

Name

Email

Preferred Phone

Mentor's Name

Mentor's Email

How long as mentor?

Please list other mentors you have had and length of time as mentor

Regional Staff Name

Email

Dates of AIM Seminars attended (two required)

Interim Training – please provide dates completed below and send copies of certificates for the following:

- UUA's *Transitional Ministry Orientation* OR Interim Ministry Network's *Fundamentals of Transitional Ministry: The Work of the Leader*
- Interim Ministry Network's *Fundamentals of Transitional Ministry: The Work of the Congregation with fieldwork*

Explain why you are interested in AIM status and what you bring to Accredited Interim Ministry. In your statement, please address how your recent ministries have demonstrated success in assisting congregations in the following:

- claiming and honoring the past and engaging and honoring grief and conflict
- recognizing unique identity as well as strengths, needs, and challenges
- clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
- making appropriate use of regional, UUA, and other resources
- proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest
- providing normal responsibilities of ministry, including worship and pastoral care.

Is there any other information you would like to share?

*The Transitions Office would prefer receiving all application materials at one time as email attachments. If the files exceed the capacity of your email provider, please use [www.wetransfer.com](http://www.wetransfer.com) or a similar online service. You may also store everything in a Dropbox and send us a link.*

*Evaluation of your application will be conducted by the Transitions Director, your mentor, and another AIM chosen by your mentor and will include a review of your UUA file by the Transitions Director.*

*Please allow six weeks after your completed application is received for a decision which you will receive by email from the Transitions Director.*

# Sample Interim Progress Appraisals (Evaluations)

## **Overview**

Interim Progress Appraisals are a time for the board and leadership to reflect with the minister on the joint work of interim ministry. How well are the leadership and interim minister working on the tasks of interim ministry? What needed more work than expected? Where does work need to begin? Is the process moving along well?

The appraisals should be approached as a conversation between leaders and the interim. The Transitions Office likes to have copies of the appraisals to learn about the congregation's readiness for settled ministry and to see how self-reflective and open the interim minister and congregation are as they move forward. They are not meant as an evaluation of the interim minister.

The evaluation from the congregation should be done as a group, with one form submitted on behalf of the leadership after consultation with the minister. The interim minister should also consult with the board before submitting their own interim ministry appraisal.

## **Cycles**

### *For a 24 month interim ministry*

The appraisals are due

1. six months after the start date
2. twelve months after the start date (usually good to begin a church year and reassessment)
3. toward the end of the interim ministry (in the last month or two)

### *For a 12 month interim ministry*

The appraisals are due:

1. six months after the start date
2. toward the end of the interim ministry (in the last month or two)

### *For interim ministries beyond 24 months*

The appraisals are due

1. six months after the start date
2. twelve months after the start date (usually good to begin a church year and reassessment)
3. at the end of 24 months after the start date (usually good to begin a church year and reassessment)
4. toward the end of the interim ministry (in the last month or two)

## Sample Appraisals for Interim Ministry

See link at <https://www.uua.org/careers/ministers/interim> (last item)

### UUA Transitions Office Interim Ministry Appraisal (example)

Interim appraisals should be completed separately by congregation and interim minister with results shared. Appraisals are due after 6 months, after 12 months, and at the end of the second year of interim ministry. In the case of a three-year interim, a final appraisal should be conducted at the end of the ministry. Please email completed form as an email attachment to [transitions@uua.org](mailto:transitions@uua.org).

All fields are required. Input fields will expand as you type. If you have a problem using this form, please contact [transitions@uua.org](mailto:transitions@uua.org).

1. Congregation Name (please enter full name)
  
2. Congregation City and State/Province
  
3. Name of Interim Minister
  
4. Date Interim Ministry Began
  
5. Name of Person Completing Appraisal
  
6. Email of Person Completing Appraisal
  
7. Role of Person Completing Appraisal
  
8. When was this appraisal conducted? after 6 months after 12 months at end of second year at end of third year
  
9. Date of Appraisal

10. How did the leadership and congregation prepare itself for interim ministry?
  
11. Had previous interim ministries affected how interim ministry is viewed? If so, please describe.
  
12. What goals were initially specified in the interim ministry application? How have they been addressed and/or modified?
  
13. Please assess the congregation's work toward engaging and acknowledging its grief and conflicts.
  
14. Please assess the congregation's work toward recognizing its unique identity and its strengths.
  
15. Please assess the congregation's work toward recognizing its needs and challenges.
  
16. Please assess the congregation's work toward understanding the appropriate role of the minister(s), church staff, and lay leaders.
  
17. Please assess the congregation's work toward successfully navigating leadership shifts that often accompany times of transition.
  
18. Please assess the congregation's use of appropriate external resources, e.g. the UUA, Regional or District Resources, etc.
  
19. Please assess the congregation's ongoing work about being engaged in the wider world e.g. service to others, social justice, anti-oppression.
  
20. Is the interim minister capably ministering as preacher, pastor, and teacher? Have there been difficulties or have constraints been put upon the minister's ability to do so?
  
21. Has the interim minister been attentive to self-care and to a spiritual practice of choice?

22. Is the interim minister courageously raising the needful issues in the congregation?
23. Is the interim minister gaining the cooperation of the church leadership in addressing those issues?
24. What would you like to see addressed during the remaining interim period or in the future? Are there any adjustments that need to be made to the initial goals or anything else?
25. Any additional thoughts or observations?
26. Has this appraisal been shared with the minister if being completed by the board or with the board if being completed by the minister?
27. If appraisal has not been shared, please explain.

# Compensation, Benefits, and Relocation for Interim Ministers

Ministers should be compensated fairly.

Fairness includes:

- Compensation (salary and housing)
- Benefits (retirement, health, dental, long-term disability, life insurance, half of the minister's self-employment taxes)
- Professional Expenses (10% of salary and housing or a minimum of 5,000)
- Relocation costs (10% of salary and housing)

It should also include adequate leave time for vacation, illness, and personal matters. Professional travel is work for the minister and should not be viewed as leave.

## Compensation

Every congregation resides in a geindex or wage rate area and is of a particular size. Both correlate to expected, adequate compensation.

To find your geindex and suggested wage-rate, go to:

<http://www.uua.org/finance/compensation/fair/congregational-staff>

Congregations are expected to pay at the recommended mid-point for their geindex and size for interim ministry. If your congregation has been paying less than this and you cannot come up to mid-point, you should not expect many applicants for interim ministry.

If your leadership and your current (perhaps previous) minister kept their salary/housing lower than fair compensation guidelines suggest (as often happens in congregations where the minister is there for a while), know that you are dealing with a deferred congregational problem, and not the incoming minister's problem. This will also likely affect the search, unless you begin to practice fair compensation.

Simply put, take responsibility for the fact that the minister has been underpaid and work to correct it, as soon and as best you can. As long as this is someone else's problem and not the congregation's, the congregation is less likely to attract the minister it needs.

## Benefits

Every minister deserves benefits. All of them. Your minister has at least a master's degree, and may have other people who depend on them financially.

If you have saved money on benefits, for one reason or another (like the minister's spouse provides health insurance), or if you can (because the interim tells you their health care is provided for), the congregation should make sure that money is conserved and available for future ministries. If your minister has something covered elsewhere, then the money saved

should be included in the minister's overall package, perhaps even in a sabbatical coverage fund for a future settled minister.

Providing full benefits means more interest for a congregation in its ministerial search.

### Professional Expenses

Professional expenses add up, often quickly. Ministers are professionals and should be treated as such. Cutting expenses is a risky business and affects the professional health of the minister and the vitality of the congregation.

To learn more about professional expenses, go to:

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### Relocation

This is often very hard on both minister and congregations. Relocation expenses are usually 10% of salary and housing because moving is so expensive. Relocation expenses are now considered taxable income by the US government, so the congregation is encouraged to help offset the additional tax burden. Everyone is encouraged to find ways to help and save.

# Developmental Ministry Overview

Developmental ministry is a program for congregations knowing that they have specific longer-term transitional work to do before being ready for a settled minister. Usually a developmental ministry lasts 4-7 years, with 4-5 being optimal.

Congregations with a traumatic history of unresolved conflict, boundary violations, clergy (or other staff or leaders) sexual misconduct, repeated and rapid ministerial turnover, abusive leadership are good candidates. So are congregations with longtime struggles over a historic and beloved building, and those where their community has changed, most often facing a decline, when the congregation may need to reinvent itself and its purpose.

Congregational leaders are unified that this work needs to occur, can readily identify areas of work needed, and realize that they must do this work with help from a minister (and, not have the minister do the work for them). They have found a way to ensure buy-in from the larger congregation. New leaders are oriented and supportive of the program when current leaders shift out of leadership positions.

The congregation must work with regional staff to be approved for developmental ministry and should contact regional staff before contacting the Transitions Office.

What developmental ministry is not:

- A way for a minister to do the work of the congregation
- A quick fix
- An audition. Developmental ministers may not be called.

For more information:

- Read Nancy Bowen's chapter "Options for Ministerial Transition Other Than Interim Ministry" in the 2<sup>nd</sup> Edition of *In the Interim*.
- Read this article about one developmental congregation:  
<http://www.uuworld.org/articles/breakthrough-boulder>
- Question and answer article from UU World <http://www.uuworld.org/articles/stub-297112>
- Talk with your regional staff person

## The Process of Finding a Developmental Minister for your Congregation

1. Leadership should do research on what developmental ministry actually is and if it's a good fit
2. Leadership should be engaged with regional staff around fit for the program
3. Leadership should agree on developmental goals with the help of regional staff

4. Leadership should engage the congregation in why they are undertaking the program and find ways for congregational buy-in
5. Leadership should be in contact then with the Transitions Office for steps to apply through the MinistrySearch system.

### **For Ministers interested in Developmental Ministry**

Developmental ministry is for ministerial colleagues with skills and interest in assisting congregations move through their developmental goals.

The developmental minister understands that

- The work is the congregation's work to do and not the minister's work.
- Systematic issues are often at play.
- The congregation is often at a low point of self-esteem and this will play itself out in a variety of ways.
- They will need outside resources to adequately minister to the congregation
- They will work with regional staff
- They will commit for a 4-7 year period, but be open to re-evaluation each year, which they will do with congregational leadership
- They will attend transitional ministry training
- They are patient, self-differentiated, and know not to take things personally
- They are not eligible to be called

# Developmental Ministry Evaluation

*This is an evaluation of the combined efforts of the congregation and minister in its developmental ministry. The form is to be completed by the board together with the developmental minister. A final copy should be sent to board members, minister, and Transitions Office (email [transitions@uua.org](mailto:transitions@uua.org)). Please use narrative form to evaluate.*

*You may distribute this form for individuals to complete, yet one composite copy only should be submitted as final. A follow-up phone conversation with the Transitions Office may be requested by the congregation and/or minister (and vice-versa).*

Today's Date

Full name of congregation

Congregation city and state/province

Name of developmental minister

Email of developmental minister

Name of person completing form

Role of person completing form

Email of person completing form

List names and roles of participants

1. What is the length of this developmental ministry and which year is being evaluated?
2. What were your initial developmental ministry goals?
3. What did you expect to work on this year?
4. What actually happened?
5. What adjustments do you need to make for the upcoming year?
6. Please describe the balance between the congregation's and the minister's work on these goals?
7. Is the workload balanced in a healthy manner between the minister and the congregation? Is the work shared throughout the congregation? Has the minister practiced appropriate self-care?
8. Please add any additional comments.
9. If you have adjusted your goals, please list your new adjusted goals
10. If you would you like a follow-up phone call with the Transitions Director, please list your name, phone number, and three possible times for a call or send an email to [transitions@uua.org](mailto:transitions@uua.org).

# Compensation, Benefits, and Relocation for Developmental Ministers

Ministers should be compensated fairly.

Fairness includes:

- Compensation (salary and housing)
- Benefits (retirement, health, dental, long-term disability, life insurance, half of the minister's self-employment taxes)
- Professional Expenses (10% of salary and housing or a minimum of 5,000)
- Relocation costs (10% of salary and housing)

It should also include adequate leave time for vacation, study leave, illness, and personal matters. Professional travel is work for the minister and should not be viewed as leave.

## Compensation

Every congregation resides in a geindex or wage rate area and is of a particular size. Both correlate to expected, adequate compensation.

To find your geindex and suggested wage-rate, go to:

<http://www.uua.org/finance/compensation/fair/congregational-staff>

Congregations are expected to pay at the recommended mid-point for their geindex and size for developmental ministry. If your congregation has been paying less than this and you cannot come up to mid-point, you should not expect many applicants for the ministry. Providing low compensation may keep you from being accepted into the developmental ministry program.

If your leadership and your current (perhaps previous) minister kept their salary/housing lower than fair compensation guidelines suggest (as often happens in congregations where the minister is there for a while), know that you are dealing with a deferred congregational problem, and not the incoming minister's problem. This will also likely affect the search, unless you begin to practice fair compensation.

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This is often very hard on both minister and congregations. Relocation expenses are usually 10% of salary and housing because moving is expensive. Relocation expenses are now considered taxable income by the US government, so the congregation is encouraged to help offset the additional tax burden. Everyone is encouraged to find ways to help and save.

# Contract Ministry Overview

Contract ministry is simply a congregation and minister making certain basic agreements for ministerial service. Most often, it is seen in part-time congregations. Any ministry of less than 75% (3/4 time) is considered a contract ministry by the UUA Transitions Office.

Contract ministries are almost always for a 1 year (or less) time agreement. They may be renewed. There should be no expectations by the congregation or the minister that the ministry will last longer than a year when the contract is agreed upon by both.

The process for finding a contract minister is simpler, though it often takes longer. Most contract ministries have a smaller scope of search. Contract ministry searches may be conducted through the MinistrySearch system, which will allow your search team to review the ministerial records of interested ministers. Using the MinistrySearch system will require your search team to complete a profile in our system with questions about your unique ministry context. If you prefer to have applicants contact your search team directly, and are not interested in viewing ministerial records, your Regional Transitions Program Manager can help you advertise your position on our jobs board: <https://ministrysearch.uua.org/jobs-board>.

## Part-time Ministry (less than 3/4 time)

Congregations seeking a ministry of less than ¾ time should request support from their regional staff, although the Transitions Office can offer limited additional assistance. Any ministry at less than 75% is considered a contract ministry by the UUA's Transitions Office.

## Listing Your Contract Ministry Position

We will list your ministerial position in our MinistrySearch system or on our jobs board. Please ask your Regional Transitions Program Manager to help initiate the search for you.

We will need to know from you to initiate your search:

- congregation's full name, city, and state
- position title
- % of time requested
- expected start date
- contact person's name and email address

## What to Expect

Often a part-time position will best be filled by a minister who lives nearby, especially for a geographically-isolated congregation. Your regional staff are often aware of local ministers who may be a good fit for your congregation.

Once you have hired your minister, please let us know so we can add your new minister's name to your congregation's record in the UUA database and the online directory and remove your listing from the MinistrySearch system or jobs board.

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Fairness includes:

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### When the Minister Commutes from a longer distance

Some part time contract ministries are filled by ministers who commute from some distance. In these cases, the minister and congregation should work together to create a reasonable schedule for when the minister is in the area. Lodging could be a concern and the minister will not be lodged with a congregant.

## **Suggestions on how to approach part time work**

The easiest way to hold reasonable expectations on part-time ministry is this:

A minister working at 75% works three weeks on, and one week off. A minister working at 50% works every other week. Ministers and congregations should not expect full time work at part time pay.

Reading through the rest of the information on settled searches and interim ministry for additional information may be of help to you.

# The Contract to Call Process

*Adapted from “The Call Process: Information for Congregations in the Extension Ministry Program,” from 2004, and the work of Rev. Janine Larson*

Regardless of whether a ministry is transitional or called/settled, the working relationship between a minister and a congregation differs from more traditional employer-employee relationships. Ministry is considered a vocation, arising from a sense of calling to a profession of faith and service, and a life of meaning. A called minister is one who has been formally voted upon by the congregation to stay in relationship for an indefinite duration of time, in contrast to being contracted for a specified period of time, or in an annually renewable position. Congregations served by contract ministers may call the minister to stay, create a covenant, and agree to work together in a mutually defined and agreed-upon ministry designed specifically for that congregation.

The transition from a contracted to a called ministry is significant. There is no longer an annual renewal of a service contract, or a defined multi-year term of service. This is not to say that there is no regular, mutual review of the ministry or potential for change in the service agreement, but continued relationship is assumed. A called minister leaves only when the minister or the congregation formally acts to end the ministry. A called minister becomes less like a “consultant” and evolves into a vested leadership partner, mutually engaged with the congregation for the fulfillment of its long-term mission.

Typically, the call process begins following a congregation-wide process of the evaluation of the ministry after at least the second year of a contract ministry. The congregation must discern if there is a match that is larger than is sought with a consultant of any type, and if the transition to open-ended, settled ministry seems like a good fit. The minister must discern if committing to a long-term relationship with the congregation is the best course for all concerned, given the dynamics experienced in the contract period and the minister’s personal call to serve the Unitarian Universalist faith. Together, the congregation and minister must assess whether vision, leadership, and financial resources are sufficiently robust to sustain new and ongoing progress in a settled ministry.

After a careful assessment and discernment process is created and implemented, a congregation may decide to call their contracted minister, or it may decide to start the process to search for a new minister to call. The guidelines which follow suggest how the assessment and discernment process may be undertaken, and how a contract minister who has served for at least two years can, by agreement with the congregation, receive and accept a call to become a settled minister of that congregation.

## Considerations of the Congregation

The congregation should think carefully about its willingness to vest their contracted minister with ongoing leadership. Deciding whether to keep a minister who already has relationships, critics, and supporters is not easy for a congregation. A definite and distinct decision process which meets the requirements of congregational by-laws, and is agreed upon and explained in advance to the entire congregation, can and will minimize miscommunication and conflict.

It is important to involve the whole congregation in the entire call process. It is equally important to accurately assess the level of commitment the congregation has in supporting the minister and in supporting the ministry of the congregation at-large. At a minimum, the congregation must be ready to:

- take into account what is best for the congregation as a whole
- support a minister with fair compensation
- continue its commitment to the minister for at least three years
- support their current minister through the call process

The minister is often well-informed about the significance of the call process. However, the minister should not take the lead in moving the decision process along, nor overemphasize their desire for a call. The decision whether to settle a minister is congregational business, and should be conducted by the congregation under its lay leadership. Professionals, including the minister, regional UUA staff, and the UUA Transitions Director can contribute information, but the lay leadership of the congregation should take the lead.

It is important to note that this process can be a stressful one for a minister. The process of evaluating the ministry and the minister can make a minister feel vulnerable. Therefore, the congregation should be prepared to support the minister along the way.

### **Considerations of the Minister**

For the minister, the key question to consider before the call process starts is: “If offered a call, would I accept, and under what conditions?” They should not entertain a call without serious intention of accepting it should it be offered. It is perfectly ethical for a minister not to entertain a request or accept a call. Ministers may not enter the process or accept a call for a variety of reasons such as: they believe their ministry with the congregation is complete, they believe the call process would divide the congregation, the finances of the congregation are not stable, or other personal and/or family reasons.

### **When to Engage the Contract to Call Process**

In general, a contracted minister should not accept a call until the end of at least two years of service, and only after a full and intentional period of assessment and discernment. In some cases, a formal Contract-to-Call arrangement is in place, usually stipulating that the minister is free to accept a call from his/her congregation shortly before the end of his/her second (or later) year of appointment. Whatever the term of the contract ministry, it is recommended that consideration of a call occurs in the year before the contract minister’s appointment expires. In this way, if the congregation or the minister chooses not to continue the relationship, the minister and the congregation then have a final year to make alternative arrangements before the contract ends. Ideally, the contracted minister takes on the role and tasks of an interim minister for the final year of the contract (while the congregation is in search) if a settlement will not occur.

A congregation deciding not to initiate the call process should contact the regional UUA staff, who, along with the UUA Transitions Director, can support and assist lay leaders and minister as they explore other ministerial options.

Sometimes, it may prove unrealistic to expect a contracted minister to serve effectively as interim minister if a call, expected by either party, failed to materialize. In this case, it may be better to work with the UUA Transitions Director and regional UUA staff to identify a minister who may serve as interim or contract minister while the congregation engages the settled search process.

## **How to Call a Contract Minister**

### **Call Process Task Force**

When a contracted minister expresses interest in a call, the congregation's governing board appoints a special Call Process Task Force to coordinate the decision-making process. The Call Process Task Force is charged to lead the membership in considering the question of a call, and to recommend a course of action to the congregation. While it is tempting to assign this function to an existing committee, a fresh, non-biased, diverse committee of five to seven members, representing a range of interests, age, gender, cultural identity, and tenure in membership will more easily gain the broad-based confidence of the congregation.

The Call Process Task Force meets first to review this handbook and otherwise educate itself regarding contract and called ministry. After study and reflection, they design the process they will lead and begin to develop a time line. Once this is accomplished, the Task Force then moves to share their recommendations for the process with the minister, the Board and then with the congregation at an all-congregation informational meeting. The Task Force should pay careful attention to what information needs to be shared and what does not. Providing regular updates to the congregation will keep everyone informed and engaged.

### **The Call Sermon**

Early in the call process, a Call Process Task Force member or a hired speaker may deliver a sermon or homily on "The Call." The service may focus, in a general way, on what the call means to whoever presents it. The service might also touch on the meaning of congregational polity, in that final decisions about ordination and calling of ministers reside with the congregation.

### **Communication**

It is important at all times to keep the communication between the Call Process Task Force, the Board, the minister, and the congregation as fluid and open as possible. Educating the congregation about the process and keeping the minister and board up-to-date on the process are vital to a successful transition from contract ministry to settled ministry. It is important to keep all stakeholders thoroughly informed in as many ways as possible: articles in the church newsletter, meetings (large and small), flyers, visual displays on bulletin boards, worship service announcements, etc. These same means of communication can be used to invite the congregation to scheduled meetings to encourage full involvement.

## **Small Group Meetings**

Small group meetings are an important element of the decision process to discuss the ministerial role and choice of the minister. Small groups of five to ten congregational members meet for the purpose of discovering members' feelings about what is occurring in their religious community. The meetings are facilitated by a member of the congregation and documented by a recorder. These sessions are intended to be confidential so that members may speak freely about their concerns and about their expectations and dreams.

## **Selection and Role of Small Group Facilitators**

When selecting small group facilitators, it is suggested that individuals with solid group process facilitation skills be utilized. In addition, facilitators need to be regarded by the congregation as non-biased and objective with the ability to create a safe environment where each participant has the opportunity to speak and listen in an atmosphere of mutual respect. For instance, when discussion about the minister occurs, the facilitator must be able to keep the focus on the role of minister and this minister's ability to fill the role, and to hear all points of view. It is a good idea for the Call Process Task Force to meet with the facilitators before the session to make sure communication is clear and unified and to respond to facilitators' questions. Before the small group meetings begin, facilitators may want to take time to record their own answers to the questions they will be asking the other congregational members. This will allow them to pay better attention to participants in the small group meetings when the time comes.

## **Tips for Small Group Facilitators**

- Arrive early and ensure your space is comfortable and welcoming.
- Make sure that you have the proper tools: newsprint, easel, markers, etc.
- Be familiar with the list of questions to be asked.
- Set the ground rules first.
- Tell participants that:
  - the session will last from \_\_\_ to \_\_\_
  - the session framework is a series of questions designed by the Call Process Task Force.
  - everyone in the group will have an opportunity to respond. Advise participants if you will be using a specific process (i.e. if you will be going around the circle one at a time, etc.)
  - your role as facilitator is to maintain focus, to make sure everyone has an opportunity to speak and listens, to be objective, etc.
  - the content of the session must remain confidential.
  - everyone is expected to listen actively and respectfully to one another.
  - this process is taking a look at what is good for the congregation as a whole.
- Appoint a recorder.
- Encourage participants to use "I" statements.
- Encourage everyone to talk. Ask the more reserved participants if they have something to add.
- Avoid having the conversation become personal about the minister or other members of the congregation.
- Have the group agree on the recorder's notes before passing them in to the Task Force.
- Acknowledge participants for their willingness to spend their time and energy for the benefit of their church community.

## **Selection and Role of Small Group Recorders**

Each small group has a designated recorder to document what is said during the small group meeting and to submit a report of the group's views to the Call Process Task Force following the meeting. It is important to designate someone who can represent accurately what is said.

## **Call Process Task Force's Role in Small Group meetings**

In advance, the Call Process Task Force chooses the questions to be asked at the meetings. The goal of the small group meetings is to assess the ministry of the congregation, not to evaluate the minister. It is important that common definitions are agreed upon among facilitators and groups for key concepts such as mission, vision, goals, etc. to ensure continuity of responses. Questions used in small group meetings might include:

- What is working well in our religious community?
- What is our shared ministry accomplishing? Or how are we living into our mission?
- What is not working well in our religious community?
- What progress has been made toward the goals we set out for our transitional ministry phase of development? *Ask this if you are prepared to review those goals in the session.*
- Is the current minister a good match for the next stage of congregational development?

## **Small Group Meeting Summary Report and its Distribution**

After receiving the small group reports, the Call Process Task Force should allow at least two meetings to consider their larger charge. While no doubt some members will express their views in terms of adequacy and inadequacy of the minister, the committee's report should clearly focus on the question, "What is best for the congregation as a whole?" The Task Force then summarizes all reports into a larger report. In this report, trends and points of consensus are identified. The report does not need to include statistical analysis but can use language indicating trends and general weights i.e. "some members, few members," etc. The report needs to be constructed in a way that it is not possible to identify particular individuals or small groups.

If issues arise with deliberations of the Call Process Task Force that cannot be resolved, the District Executive/ local UUA staff or Transitions Consultant may be contacted for assistance; the UUA's Transitions Director is an additional resource if needed.

Before presenting a summary report to the congregation, there should be a discussion with the minister and the Board regarding what information needs to be disseminated to the congregation at large and by what method. When sharing the results of the report with the minister it is important to consider how information will be presented to him/her prior to the discussion. It is advised that a few members of the Call Process Task Force and the Committee on Ministry be present when discussing the summary report with the minister to ensure that a broad and clear understanding of the information is achieved. The information and discussion at this meeting is to be kept confidential.

If the findings of the report tend to be negative, then no more than two people should be present when talking with the minister. The chairs of the Call Process Task Force and the Committee on Ministry would perhaps be the choices for this role. In the case of negative findings, prior

preparation for the discussion becomes even more critical. It is essential that information be presented factually to the minister, while speaking the “truth in the spirit of love.” At this point, the minister may decide to withdraw from the call process and save the congregation from splitting or offering up a “no” or “split” vote at a later congregational meeting.

The Board may then decide to present the summary report to the congregation. Unless the board and Call Process Task Force have agreed on another method, the presentation should be in one or more informational meetings with a readable page (print or on screen) available at the meeting. Distribution of a print or electronic summary report should be available following the information meeting(s).

### **Making the Decision to Call**

A consensus decision is desirable, but not required, on whether to recommend/not recommend a vote for a call to the Board and then to the congregation. It is courteous for one member of the Call Process Task Force to meet privately with the minister to report the recommendation before presenting it to the Board. The Board may wish to endorse the Call Process Task Force’s recommendation or simply pass it along to the congregation. A short summary report should be prepared and made available to the congregation at least two weeks prior to the congregational meeting.

### **Congregational Vote**

It is recommended that a special congregational meeting be scheduled, separately from the annual meeting, for the sole purpose of voting to offer a call to settlement. Check your congregation’s bylaws and policies in advance for any provisions related to calling a minister, and ensure that your process meets any such provisions.

The special congregational meeting to consider extending a call to ministry will be facilitated by the Call Process Task Force with the support of the Board. The meeting should be publicized widely, encouraging a large turnout. This is a very important time in the life of a congregation. Using paper ballots will ensure individual privacy.

Although a congregation’s bylaws may set forth a minimum positive vote (usually a super-majority) required to call a minister, the minister will often set a higher threshold regarding what level of support (% of votes) they will consider necessary to accept a call to settled ministry. The UUA Transitions Office recommends affirmation of not less than a 90-95% of the congregational vote when calling a minister during an open search. Because an incumbent has an established history which undoubtedly will include those who are at odds with the minister because of difficult but necessary decisions, it may be reasonable for a current minister to be quite content with an affirmative vote as low as 85-90%.

In order for the call to take effect, the minister must accept it. If attendance at the meeting is high, the resulting vote is positive, and the minister’s requirements have been met, acceptance is likely but should not be taken for granted. When there is any opposition, often ministers want to speak with those who voted “no” to consider the meaning of the opposition, before making the final commitment and accepting the call.

## **Installation Ceremony**

It is customary to celebrate a successful call with an installation ceremony. The installation ceremony will distinguish the point at which the minister enters into a new stage of ministry with the congregation. This is a separate celebration from that of the covenanting service (a ritual typically performed between the minister and congregation at the beginning of a contract ministry). The installation ceremony signifies that a significant commitment has been made.

Any time after the vote can be a good time to schedule the installation ceremony. Because the minister and the congregation typically have another year remaining in the contract ministry, it is fine to wait until the contract period is nearly concluded. It is also acceptable to rescind the existing contract for ministry and enter into a Letter of Agreement for settled ministry at any mutually agreeable point after a successful call process.

## **Committee on Ministry**

When the minister was initially contracted, a Committee on Ministry may have been formed to facilitate a supportive relationship between the minister and lay leaders, as well as with other members of the congregation. This committee supports the idea of “shared ministry” in the congregation based upon how the mission of the congregation is identified, as well as the role of the minister in that mission. Lay leaders and the minister all carry shared responsibility for accomplishing the goals. If this kind of Committee on Ministry exists, it should continue into, and remain an active part of, settled ministry.

The role of the Committee on Ministry is changing in many congregations. The minister, board and congregation should consider whether and how a Committee on Ministry can best support vibrant shared ministry in the congregation. More information on Committees on Ministry can be obtained from regional UUA staff.

## **Suggested Call Process Time Line**

The following time line is an example only. Your plan will be unique to your congregation. Allowing appropriate time and thorough consideration for each step of the time line will result in a broad consensus supporting whatever decision the congregation ultimately makes.

The timeline below assumes a final year of contract ministry will follow the call process. If this is not planned, a congregational vote held by March 15 will give both the minister and the congregation appropriate time to enter the transition/interim process for the following fall; a vote by September 15 will accommodate a February transition/interim start.

## **Penultimate Year of Contract Ministry**

January: Board appoints Call Process Task Force. The task force meets with current minister to determine whether the minister will consider a call, if extended. (If “Yes,” then follow the remaining components of the time line. If “No,” then the search process begins – advise Board and consult with your regional transitions program manager about next steps.)

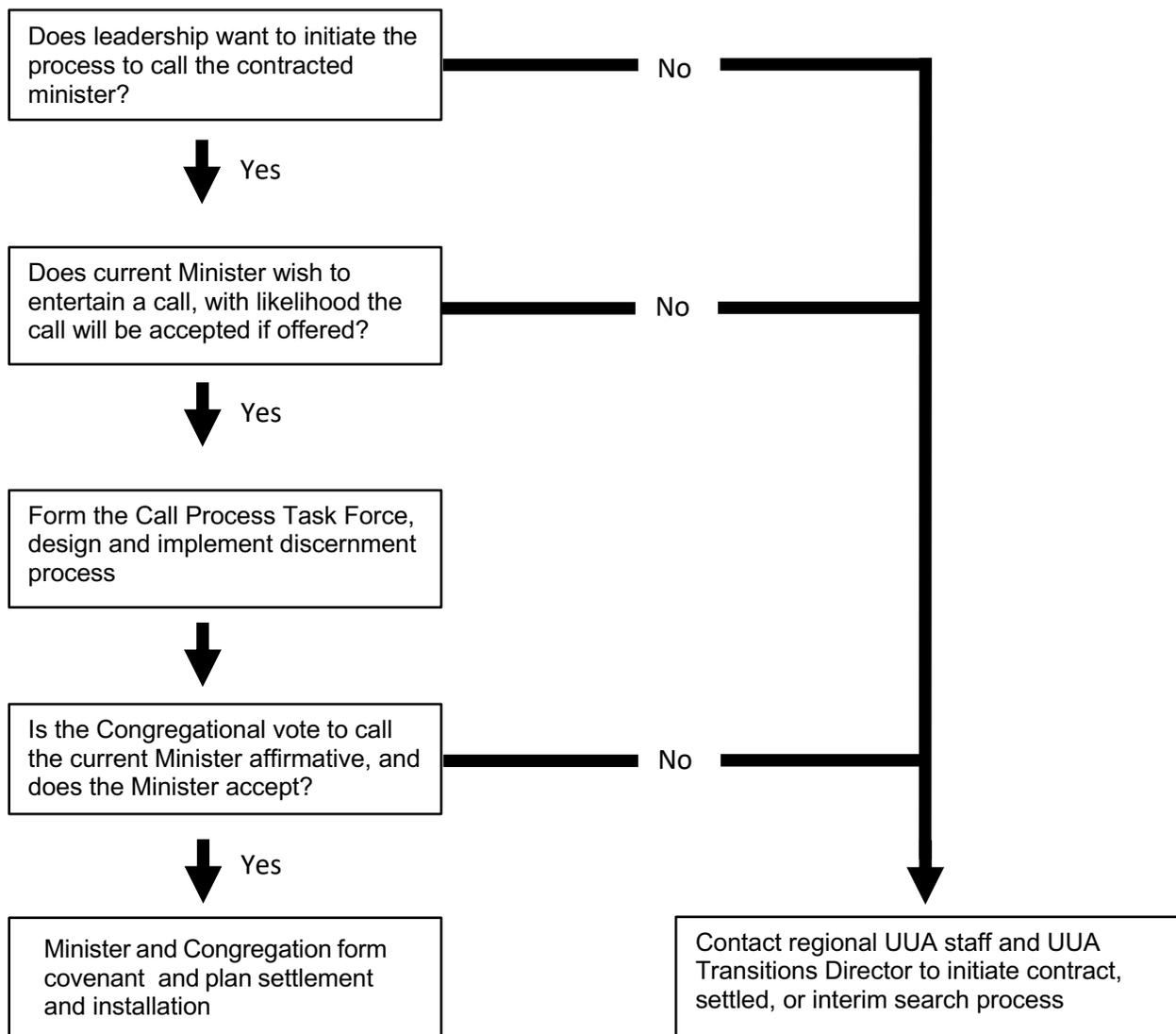
February: The Call Process Task Force meets to plan its process, to develop a time line, and to assign responsibilities to its members. The task force communicates its plan to the congregation.

March: A Call Process Task Force member, UUA consultant or staff member, or an area minister delivers a sermon about called ministry during a Sunday service.

April: Small group meetings take place. The Call Process Task Force presents a summary report to the Board, minister, and congregation.

June: A congregational vote is taken on the call. If affirmative, minister accepts or declines. Contact regional UUA staff if the call result is not affirmative, or if minister decline

### Contract to Call Decision Tree



## When Ministers Are Scarce

From time to time, a minister cannot be found to serve a congregation in need. While fellowshipped ministers are always considered first, in recent years, the UUA Transitions Director, the UUA Ministerial Credentialing Director, and the UUA regional staff have collaborated to help support a student in candidate status to serve such a congregation. The UUA's Ministerial Fellowship Committee's Rules and Policies, to which students and other candidates are accountable, seek to prevent a candidate eager to serve from getting ahead of their preparation process. Those applying for candidacy status are required "to defer accepting any ministerial position other than internships and student ministries unless approved by the Ministerial Credentialing Director. Violation of this policy shall render the candidate ineligible for an interview with the Ministerial Fellowship Committee or Ministerial Fellowship for four years from the commencement of the position." Upon learning that a candidate has interest in serving a contract ministry, the Ministerial Credentialing Director will first consult with the Transitions Director and the appropriate regional staff person for guidance.

Because UUA regional staff is familiar with the congregation, and thus able to describe the abilities needed for a candidate to serve effectively, and because the Ministerial Credentialing Director is best positioned to judge a candidate's possession of those abilities, the congregation's risk in hiring a candidate is kept to a reasonable minimum. The candidate will be expected to ask a minister in fellowship to serve as a mentor, and to be in frequent contact with the regional staff. A candidate serving under this arrangement should be able to expect compensation equal to at least 90 percent of the UUA-recommended minimum, taking into account the congregation's size and wage rate area. Contract ministries are understood to be time-limited arrangements, typically of one year in length. Once in a while, and only in consultation with regional staff and the Ministerial Credentialing Director, can a contract ministry continue after one year. Candidates who are not ordained are not eligible to receive a housing allowance.

## Other Staff Positions

Other staff positions outside of ministry can now be posted on the Jobs Board of the MinistrySearch system.

To list such a position, please complete the following form:

<https://uua.wufoo.com/forms/job-board-listing-request/>