



# **Settlement Handbook**

Transitions Office

*Revised 11/2021*

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## **About the Handbook (2021-2022 Edition)**

It took eight years to rewrite this handbook! Eight years of learning have gone into producing a more holistic handbook—one that is not based on the experience of one year of search. The latest edition has a few edits and from last year’s extensive overhaul, but we continue to make it better.

The information here comes from the collective wisdom of all the people who worked in connection with ministerial transitions during those eight years—the Transitions Office, UUA staff, the volunteers who support search processes, compensation consultants, and, most importantly, ministers and congregations in search for settled ministry.

This handbook is a culmination of learnings and recommended best practices from those eight years. The handbook serves three primary purposes:

1. To provide clarity and a navigation aid for those involved in search about the various pieces and processes that make up the whole.
2. To ensure fairness for all those in the search process by providing rules, best practices, acceptable deviations, and background information on why this process is the way that it is. Hint: if it’s not mentioned here in the Settlement Handbook somewhere, it’s probably not an acceptable deviation.
3. To remind everyone that this is a team effort. The UUA Transitions Office is committed to a holistic and anti-oppressive approach in search. We are here to support congregations and ministers through the search process. While we can’t guarantee a successful search, if you do everything the handbook tells you, we are committed to doing our part in the process alongside the ministers and congregations in search. We ask that congregations and ministers take responsibility for their part in the process, remembering they are one of many congregations or ministers searching at the same time. Being a part of a common faith, we ask that everyone be committed to serving Unitarian Universalism in this search process as well.

The manual is for searching congregations, ministers in search, UUA staff, volunteers who support the work of search, and anyone else wanting to learn more about the settled search process. Information on interim, developmental, and contract ministry searches is found in the Transitional Ministry Handbook.

The Settlement Handbook is offered in two formats:

- This PDF file of the entire document, which should be read at least once from start to finish by all searching ministers, church leaders, members, and Transitions Coaches.
- A slightly abridged, conversational [video version](#) is also available.

If you find grammatical or syntax errors in this document, please email [transitions@uua.org](mailto:transitions@uua.org). For questions and clarifications email the Transitions Program Manager at [cpurcell@uua.org](mailto:cpurcell@uua.org) or Transitions Office staff at [transitions@uua.org](mailto:transitions@uua.org). Minor Handbook changes may be made for clarity on a rolling basis. Any major change affecting the process will be sent out via our email list to ministers, search committees, support volunteers, and staff.

## **Language**

Plural pronouns (they/them/their) are used throughout the handbook to honor both the diversity of gender identities in Unitarian Universalism as well as being inclusive of co-ministry teams in search for one position.

# Search Overview

## Background Information to Improve the Odds of Better Decision Making

After years of guiding congregations and ministers through the search process, the Transitions Office has seen one truism over and over again:

*Anxiety hampers good decision-making.*

Congregations have it. Ministers have it. Often, they are good at sharing it. Curiously, anxiety is most comparable to snowflakes; no two anxieties are ever identical. Sure, congregations have anxiety about whether they will find a minister, and ministers have anxiety about whether they will find a congregation, but, almost always, the anxiety is deeper and more multi-layered than that.

Congregations create narratives from their previous histories of search and ministry that guide their next search processes. Ministers do the same. “We need a minister who is good at administration.” Somewhere, often unspoken, is the belief the previous minister was not good at administration. Also missing here is the unspoken expectation that the minister will not only be good at administration but be just as good at all the things the previous minister was and will just simply add good administration without giving up some other piece of ministry. “I want a congregation that wants the minister to lead.” What’s missing here is an understanding of how much trust-building needs to occur for the minister to be seen by the congregation as their minister, and that this takes time, cooperation, and shared experiences.

If there is help for managing anxiety, it’s self-awareness. Recognizing the anxiety, knowing why you have it and how it manifests itself in how you are feeling and what you are likely to do---all of this makes you less reactive, less closed, and less tied to the past, and more likely to be proactive, open to possibility, and ready to create a new future.

Anxiety can show itself in many forms. Desperation, determination, overly controlling behavior, indecisiveness, and asking others to solve issues (often so someone else is held responsible for it later), procrastination, rushing, wallowing, hyper-focusing on one detail, going down rabbit holes, conflict, overanalyzing, excessive worrying, distraction, and perfectionism—all are different ways anxiety has played out for ministers and congregations in the search process.

Self-awareness improves the odds that anxiety won’t govern your process. With self-awareness comes the ability to make choices about what to do with the anxiety or to ask for help. Both are better options than letting anxiety rule your search process.

The Settlement Handbook exists to provide as much clarity as possible about the ministerial search for both congregations and ministers so that everyone can make the best decision possible. We (the UUA—the Transitions Office, UUA Regional Staff, search committee retreat leaders, compensation consultants, Beyond Categorical Thinking trainers) can do something about the particulars, the nuts and bolts, the order of events.



While we hope the manual provides enough good information to allow for clear process, we also know that we are only part of the three-legged equation. Congregations and ministers are the other addends (or pieces) that make up the sum total of the ministerial search process.

Each piece has its part.

The UUA can provide the structure, the road map, the cautions and learnings from previous searches.

Ministers must bring themselves as ministers, willing to authentically share their vision, gifts, and humanity for ministry with a congregation. They must also know their limits and where they need further professional development. Ultimately, they must be willing to take the time to build trust with a congregation. They must also know how their anxieties can prevent these things from happening.

Congregations must also bring authenticity to the search process. No good minister expects a perfect congregation. This is not why people were called to ministry. They were called to ministry to journey with a congregation and its people, navigating the space between who they are and who they want to be. The congregation able to present its challenges, even clarifying which ones they do and do not want to work on with a minister, is better served than the congregation which presents only a good picture of itself. Also, congregations able to present the imperfect in themselves are more likely to appreciate ministers who bring their own imperfect humanity to ministry.

To use a metaphor, any realtor will tell you that buyers have their list of “must haves.” Given what they can afford, most people looking for a home overestimate what they can get. They end up having to make the best of what they can put into a new place to live. This metaphor is true of ministerial search for both congregations and ministers. If you want the “perfect” home, be prepared to spend a lot of money up-front, and be willing to spend more over time on upkeep and maintenance. Setting reasonable expectations for yourselves will only help.

To extend the metaphor, no two housing markets are ever alike. What’s available one year might not be available the next. For both ministers and congregations, **no two search cycles are alike**. Whatever experience you had in your last search, the odds that this search will be identical to the last one are extremely low.

Different ministers are in search every year. The number of ministers in the search process is another key factor. The same is true for congregations. Not only are there different congregations and a different number of congregations in search, but the sizes of the congregations, what they can pay ministers, and geography all come into play. In some cases, ministers are not only looking for where they can do ministry, but also where their spouses can find work.

With these variables comes the reality that there is no guarantee. Congregations and ministers may do everything well and still not find what they want in a particular search process. The opposite of this has also happened. The pressure can be great to settle, yet failure in search occurs not from coming up empty, but from deciding to select something you know ultimately won’t work out. Better to search well than quickly.

To support congregations and ministers through this process, the Settlement Handbook will provide you with the structure to improve the odds for a good search and settlement.

To that end, this Settlement Handbook is divided into nine sections—this overview, the seven phases of the settled search process, and a final section on what happens if no match occurs.

Each section will provide you with information about the search process and the recommended best practices for each piece of each step. Additionally, we'll try and give you a little history and background of each, not so much to bore you (though it might), but to give you some insight as to why things are the way they are.

Each section is divided into its own pieces—an overview with background information and philosophy, the key elements of each phase, a calendar, frequently asked questions, links to forms needed in each phase, information about the role of MinistrySearch in that particular phase of search, any other piece of needed information or food for thought, and case studies taken from real situations to encourage people to ponder, discuss, and learn.

While the sections/phases are linear in their presentation, they also can and sometimes do overlap. This is especially true for ministers who are in search and are also looking at a potential next ministry. Everything cannot be done separately and perfectly, though it should not be glossed over, bypassed, or assumed to be unnecessary. This becomes complicated on a set timeline, which settled search most has, yet most congregations and ministers manage to make this work with the help of the process, Coaches, and UUA staff,

All sections are necessary but not all are equal, especially in terms of time and work commitment. Each covers a distinct phase of the overall search.

Phase 1: Concluding a Ministry Well comes out of the very real and lived experience that any and all previous ministries affect the next ministry. Congregants and ministers often blur ministries into a single narrative and base their next ministry on this narrative, often expecting it to be the same or, conversely, assuming it will have no effect on their next ministry. Neither assumption is true.

Phase 2: Education and Preparation for Search focuses on intentionality, being mindful of the process of moving the entire congregation toward search with deliberation and care, knowing who can and should assist you in the process, and knowing how to select a search committee wisely, fund the research, and connecting with a search committee retreat leader. For ministers, this involves research, information gathering, and thoughts on timing, whether you are finishing your ministerial preparation or serving in a ministry.

Phase 3: Building the Structure to Search includes congregations' search committee roles, process, and organization. The work of the search committee is to gather information, materials, and insights on the congregation to present an authentic picture for ministers. For ministers, this involves preparation of their materials, website, and references for the search.

Phase 4: Opening Up for the Search is about the search committee presenting itself publicly to ministers, ministers expressing interest in congregations, what each should do once that happens, and what a congregation should know as this goes on.

Phase 5: Discernment/Mutual Selection is about the process of moving from many options to a final option for both ministers and congregations. This process moves from the initial release of ministers' names to congregations to interviews to pre-candidating weekends to the final discernment process.

Phase 6: Finalizing the Offer is about what happens when you have a mutual yes and are moving toward a candidating week. This includes contract negotiations, background checks, and announcing the candidate.

Phase 7: Entering into a New Ministry is about what happens during candidating week and beyond.

If No Match Occurs: The Second Offer Date is for congregations and ministers who are interested in continuing in settled search but did not find or become a candidate after the first offer date. This is a continuation of the settled search process, albeit on a tighter timeline.

By sorting this information into different phases, the hope is that you will understand that ministerial search is both multi-faceted and manageable. This is the continuum.

You may hear someone in a congregation say, “We just need to get a minister,” yet ministers are not the same. While many ministers could serve many different congregations well, ministers are looking for congregations that value the ministers’ specific gifts, have their own specific needs, and are willing to work with ministers towards common visions and goals. Congregations also have their own specific gifts and challenges, and no minister should assume all congregations are alike or that the minister’s own gifts and challenges will be what every congregation needs at a particular moment. Indeed, one of the most common statements departing ministers make is, “The congregation needs someone different who....”

There are basic skills needed, of course. All ministers should know how to preach and do pastoral care, though even how good preaching and pastoral care are defined will vary by congregation. Ministers hope that a congregation will be a place of community, growth, justice, and possibility, though this varies from congregation to congregation as well.

The more generic and unclear the anxiety is, the less likely the congregation or minister are to find what they need. This is where resources from outside can be useful. For congregations, the interim minister, the Transitions Program Manager, regional staff, and/or the volunteers who support searches can be potential mirrors, questioners, and connectors of dots. For ministers, colleagues, especially mentors, regional staff who know you, and the Transitions Office are your most likely grounding presences and reality checks.

Searching congregations and ministers improve the odds of success by getting support from multiple places. Curiously, this is true for congregations and ministers outside of search as well.

All of these resources, including the Settlement Handbook, exist to support you by providing some clarity for you to make good decisions. Ultimately, however, they are your decisions to make—just don’t go it alone.

## **Key Elements**

### **Percentage of Time**

- Anything less than full time is considered a contract ministry.

- Congregations must be clear about the percentage of time they are requesting from a minister before posting a position.
- Historically, congregations at 75% time have significantly less interest (usually 1/3 of the interest) than congregations at 100%. To be fair, they also get twice as much interest as congregations seeking ministry at 50% time.
- Most ministers serving at 75% work three weeks on and one week off to clearly define the amount of ministry offered. Congregations should not offer a 75% position expecting to get full-time ministry for lower compensation. Ministers serving 75% time do no favors for the congregation and their ministerial colleagues by overworking and setting up unreasonable expectations.

### **Fellowshipped Ministers and Access to Search**

- The MinistrySearch system is open to ministers in Fellowship with the UUA.
- Transfer candidates from other denominations should contact the UUA's Credentialing Office to learn about the process to becoming credentialed as a Unitarian Universalist minister. The Credentialing Office tries to make this as easy as possible, yet the process generally takes two years.
- Ministerial candidates who have a scheduled MFC appointment may access the MinistrySearch system to begin a ministerial record. Candidates may not apply for any position prior to being cleared for search by the MFC. The Ministerial Credential Director, in consultation with the Transitions Director, can approve specific requests of candidates for contract ministries only.
- Non-fellowshipped ministers are not allowed to access the system. All congregations should be wary of any minister who will not access the MinistrySearch system and still wishes to apply to their congregation.
- Some ministers are on restrictions from some searches. Ministers under such restrictions should only apply for positions which their restrictions allow.
- **Congregations in search: If a minister reaches out to you about your position and seems unwilling to use the MinistrySearch system, you are strongly encouraged to contact your regional staff or the UUA Transitions Office to determine if the minister is eligible to serve.**
- All ministers are encouraged to be members of the UU Ministers Association (UUMA). All ministers in search are required to follow the guidelines of the UUMA whether they are a member or not.

## Other Eligibility Rules for Ministers in Search

### Moving from Contract Ministry into a Call (Inside Candidate Process)

- Definition: A minister who is a member or staff member of a congregation with a vacant position may be considered only as an “inside candidate.” This also includes affiliated community ministers.
- Inside candidates must express interest to the search committee and the Transitions Office early in the process.
- The search committee must make a yes or no decision on the inside candidate before their congregational record may be viewed by other potential applicants.
- If a congregation has more than one inside candidate, they should contact the Transitions Office for guidance on how to proceed.
- Historically, inside candidates have been successful when the idea originates from the congregation (and not the inside candidate suggesting this—where it rarely is successful).
- If ministers present themselves as inside candidates to a search committee and are not selected to be the candidate, they should leave the congregation. In the past, ministers who presented themselves as inside candidates and were not selected have left the congregation so as not to divide the search committee (and ultimately the congregation).

This process involves a contract minister who is either serving year to year or in a second ministry position of any kind. Subtle differences in this process will be discussed at the end of the section.

A contract minister is eligible to be called to a congregation through the ministerial search process. And while a congregation can simply decide to vote yes or no without a search committee due to congregational polity, the Transitions Office recommends a congregation follow the standard search process with modifications when looking at calling their contract minister. The standard search process is this handbook.

The modifications are fairly simple, while much remains intact:

- The congregation still elects a search committee by the recommended process.
- The search committee still assigns roles and leads the congregation through the learning process of what kind of ministry it needs next.
- The search committee still compiles search materials as the handbook requires.
- The congregational record is still prepared and is shared with the inside candidate.
- The search committee will prepare for pre-candidating.

- The search committee will make a recommendation to the entire congregation. If this includes a candidate recommendation, there will be a candidating week and a vote.

Yet, there are some differences:

- The search committee must consider whether or not they will consider an inside candidate. Ideally, it's their idea to do and they ask the contract minister to apply for the settled position. If the contract minister asks, then the search committee must decide whether or not this is a viable possibility and then move on after the decision.
- Cottage meetings may focus not only on congregational needs but how the potential inside candidate would fill those needs.
- The congregational record and documents packet must be ready no later than November 30.
- Once the congregational record is approved and shared with the inside candidate, the search committee requests the ministerial record sheet of their inside candidate from the Transitions Office.
- The Transitions Office will release the ministerial record to the congregation early and the search committee will have a pre-candidating weekend with the contract minister/inside candidate sometime that month (before Dec 31<sup>st</sup>).
- After the pre-candidating weekend, the search committee will meet to decide whether to recommend the minister as their candidate.
- If the answer is yes, the search committee alerts the Transitions Office of their decision and may schedule a candidating week beginning as early as January with the contract minister as their candidate.
- If the answer is no, the search committee alerts the Transitions Office of their decision and should consult with the Transitions Office about their options, which include continuing or suspending the search.
- If the search committee continues the search, they will be re-opened pending official notification to the candidate and the official approval from the Transitions Office.
- If the inside candidate is called to the congregation, the search portion of the transitions process is complete. The new contract may be initiated at either the end of the current contract or sooner, if both parties agree.
- If the inside candidate is not called, the search portion is ended for the year for a settled position and the search committee and congregational leadership should consult with the Transitions Office over options.

### **Differences between a Senior Contract Minister and a Second Contract Minister**

There are some significant differences between a congregation where the only minister is a contract minister versus a congregation that contracts with a second minister (assistant minister); one is perception. The solo contract minister is likely already seen as doing all the functions of a called minister. A second ministry may be in a more confined role and there may or may not be imaginings and opinions of how the second minister would assume the new role. In some ways, congregations often have a hard time of making this shift. Thus, many second ministers wanting to become called senior ministers face a hard time being seen in a new ministerial role. Unless there has been preparation by the outgoing minister and the congregational leadership, such succession is unlikely. Rarely has the new suggestion by a second minister that they could be the senior minister led to them being called as senior minister. When the idea originates and is owned by the congregation, success is likely.

Another difference, though not unrelated, is about trust. The solo contract minister has earned the trust of the congregation in all roles they are expected to perform. The second minister candidate is more likely to have to earn the trust in what appears like a new role to the congregation. And while the congregation may have trust in the second minister in the current role, new responsibilities and expectations require new trust. Additionally, some congregants may really like the second minister in the ministry they had done and may want to pull them back into that ministerial role.

A minor note on pre-candidating weekends is that often a Search Committee wants to see a minister preach so they can really grasp the second minister in a new role, providing vision for the entire congregation. This is less likely when there is a solo contract minister. It is up to each Search Committee to decide how best to meet its needs to make the decision to make a candidacy offer.

## **Timing**

While the timing above suggests that the process for calling a contract minister mirror the settled search process, a contract minister may be called at any time.

## **Voting**

If a Search Committee decides not to recommend a contract minister for a call, the search can continue in the typical search process. If a vote happens by the congregation on a candidate, the congregation should discuss options with regional staff and the Transitions Office to explore best options, though moving directly back into the search process is not recommended.

## **Three Year Rule for Intern and Student Ministers, Interim Ministers, and Other Professional Staff**

- For three years after the completion of a student ministry, ministerial internship, or interim ministry, a minister may not apply to any professional position in the same congregation.
- This rule also applies to ministers who have done student field work or ministry or filled other staff positions in the congregation.
- As an example, an intern completed their internship on June 30, 1996. This means the intern could not have applied for an open settled position until July 1, 1999.

## **Professional Appearance Rule for Settled Searches**

- A minister who has visited a congregation in any professional capacity after the past minister(s) has announced their resignation to the congregation cannot apply for that position to that congregation for twelve months following the visit. It is highly recommended that any potential minister applicant not provide service to the congregation once the information is public that the congregation will be in ministerial search.
- For a new ministry position, this rule applies from the date the congregation or its board votes definitively to create the position.

- “Any professional capacity” includes a visit as a consultant, leading a class or workshop, or performing as a musician.
- It does not include an interview for an interim ministry.
- If in doubt, check with the Transitions Director for clarification before accepting the engagement.

## **Language of Hire and Call**

- Settled ministers are called by a congregation. Most ministers desire at least a 90% vote to accept a call. A called minister’s contract should be reviewed yearly by the Governing Board, though the minister and congregation understand the ministry’s end date is not set.
- Contract, developmental, and interim ministers are hired by the Governing Board for a specific time period. Contract ministries are usually for a year with an option to renew. Developmental and interim ministry contracts are set for a specific number of years, though they may be extended for a year with approval from the Transitions Office and regional staff.

## **Manners**

- Often, the greatest kindness in search is timeliness. Acknowledging interest, the receipt of materials, keeping people informed of timelines, being on time for video interviews, being gracious in the face of last-minute changes—all of these and more matter in the search. Timeliness, however, does not equal immediacy.
- Avoid acronyms in written communications with others regarding search. Most people outside of a congregation do not know other congregations by acronyms. Please list city and state/province in communications.
- Understanding of good manners is not the same across cultures, regions, and identities. Do not assume your understanding of manners matches everyone’s understanding of manners. For example, how people are greeted and welcomed varies widely by culture, region, and identity. Does being polite mean being kind, efficient, direct, passive, understated, gregarious, or something else?
- The MinistrySearch system provides a simple and efficient way to express gratitude for interest and to notify a minister or congregation that you are not continuing with your search with them at this time. It also allows you to create your own message. Please use the system for this purpose.
- The Transitions Office is available and willing to be the receptacle of vented stories of hurtful interactions.



## **Covenant Requirement**

- All searching congregations, searching ministers, and those who assist congregations and ministers in the search process are asked to covenant with one another for a fair and responsible search process. This new requirement centers a key component of our Unitarian Universalist faith, the sacred promises we make to one another, in the vital work of ministry search.
- Congregations and ministers who have not agreed to covenant will not have their materials shared with others in the transition process.
- Those congregations and ministers who do not keep the covenant will face restrictions and may be held from the search process. Volunteers who support the search process and staff out of covenant will be referred to those who supervise them.
- You may enter into the search covenant by checking the appropriate box on your congregational or ministerial record on MinistrySearch; there is no separate form to fill out or submit.
- Volunteers and UUA Staff, by their paid work, are assumed to have agreed to follow the covenant. The UUA Transitions Office fully abides by the covenant below.

### **Covenant for Searching Congregations**

As a Search Committee representing our congregation, we covenant to:

- A. Serve our congregation to the best of our ability, realizing, both as a group and individually, we represent the face of our congregation and community in the ministerial search process. We will represent our congregation with forthright honesty, care, compassion, and respect.
- B. Follow the rules and timelines within the Settlement Handbook and the Transitions Office website.
- C. Honor a minister's needs to follow the guidelines for the UUMA (regardless of membership).
- D. Inform and work with the Transitions Office and regional staff throughout the transitional process.
- E. Fund the cost of ministers' and their partners' travel to our congregation for all pre-candidating weekends and candidating week, if those events will take place in person.
- F. Understand the need for fairness and confidentiality throughout the search process.

### **Covenant for Searching Ministers**

As a Unitarian Universalist minister representing our faith, I covenant to:

- A. Serve our Association of congregations to the best of my ability. I pledge to interact with each congregation I encounter in the search process with respect, kindness, and authenticity.
- B. Follow the rules and timelines within the Settlement Handbook and the Transitions Office website.
- C. Follow the Guidelines for the UUMA (regardless of membership).
- D. Inform and work with the Transitions Office and regional staff throughout the search process.
- E. Understand the need for fairness and confidentiality throughout the search process.

### **Covenant for UUA Staff and Volunteers Who Support Transitions**

As the Transitions Office staff, regional staff, and search volunteers representing our faith, we covenant to:

- A. Serve our Association of congregations to the best of our abilities. We pledge to interact with each congregation we encounter in the search process with respect, kindness, and authenticity.
- B. Serve the ministers in search by following the rules and honor the timeline of the search process.
- C. Serve our Unitarian Universalist faith in a way that supports its values and manage the ministerial search process in a way that respects all involved.

### **Congregational Polity**

- While congregational polity means self-determination for congregations, with it comes a responsibility to others and to all the values of Unitarian Universalism. The search process is designed so that both polity and responsibility can be mutually honored.
- We encourage every congregation to use the MinistrySearch system as a matter of safety since the system is only open to UU ministers who have gone through the appropriate preparation and process and remain in fellowship.

### **UUMA Guidelines**

- All ministers in search are required to follow the [professional guidelines of the UU Ministers Association](#).

## Second Ministry Searches

- There is a [manual for second ministry searches](#).
- Second ministry searches for full-time positions can follow the settled ministry search cycle, though they are viewed by the Transitions Office as contract ministries.
- Senior ministers are encouraged to discuss their options with the Transitions Director early in their process.
- The coach for all second ministry positions is the Transitions Director.

## Congregational Staff

- Staff members serving UU congregations in search may not serve on the ministerial search committee.
- Staff members should not be interview sources for ministers in search—the one exception being other ministers serving on staff, as they are in covenant with each other by UUMA Guidelines.
- Should a staff member learn that an applicant is considering the congregation where the staff member serves, the staff member should keep confidentiality about the applicant, avoid expressing their opinions about the applicant, and avoid being a reference about the congregation.
- The search committee may meet with staff for information and reflection about the search process.
- During candidating week, the ministerial candidate and staff should have at least one meeting.
- [Transitions Support for Congregational Staff](#) provides more information and resources.

## Anti-Oppression Commitment

- The Transitions Office is committed to serving all ministers and congregations with an understanding of how oppression, supremacy, and bias work in the world, and is continually examining how these are at play in the search system.
- All congregations expected to participate in the Beyond Categorical Thinking program as part of the search process.
- All congregations and searching ministers are best served by authentically sharing what they have learned and by not over-promising.
- For people from historically marginalized groups involved in the search process, you will experience micro-aggression, bias, and supremacist thinking at times. This does not mean you cannot do good ministry or good work as part of the search.

- It is not the responsibility of people from historically marginalized groups to educate the people who say or do something that is biased or oppressive. Ministers experiencing micro-aggressions, bias, and oppression are encouraged to inform the Transitions Director. Search committee members experiencing bias in the process, if other members of the search committee are unable to acknowledge and handle the bias, should talk to their interim minister, the Transitions Program Manager, or Transitions Office.
- Search committee members needing help understanding issues of supremacy and fragility who are not from historically marginalized groups should contact the Transitions Program Manager.
- Assuming a minister with a particular identity will bring more people into the congregation with that identity is a trap for both the congregation and the minister; it is an individual solution to a systemic problem.
- The Settlement Handbook uses plural pronouns (they/them/their) throughout as one way to avoid bias.

## How Search Has Changed

At one time, the search for a minister happened by paper, expensive long-distance phone calls, notebooks, the postal system, and denominational influence. Congregations and ministers had to type their materials via typewriter, put a packet together in a notebook, and mail them through the postal system. Ministers had to ask the UUA to have their names sent to places and the UUA would then decide where to send the names, which sometimes did not match the ministers' requests. Three-ring notebooks of the applying ministers' packets were passed secretly amongst Search Committee members. Congregations told stories that they never got good names from the UUA. Most of the ministers identified as straight, white, able-bodied, cis-gender (though that word probably did not exist then) males who were the primary source of income for their family.

Slowly, things changed. Email came into being. The World Wide Web changed the way we got information. Mobile phones became available. Paper became less needed. Ministry became less male, white, straight, cisgender, and, along the way, stopped being the primary source of income for many ministers. In 2000, a new computerized settlement system allowed for a change to how ministers and congregations found each other with the UUA stepping out of the middle. A free-market system was introduced. Ministers could express their interest for any congregation. Congregations no longer had to ask for new names to be sent to them. It was hoped that this would end the story of the "UUA never sent us anyone good," and put emphasis on how a congregation presented itself through its stories and its compensation level. Congregations and ministers spent time, effort, and money to create websites just for their search processes. Search Committees moved from no group calls to conference calls to video conferencing for initial interviews. Technology saved time through easier access and distribution with less reliance on paper. With equal access to information and a free market system, a schedule with deadlines became needed to promote a fair search for all. Congregations and ministers created record sheets in a search system. The UUA could provide a search committee or minister with a forgotten username and password. The UUA had to verify ministers' standing

and work history. Search committees had to enter data that they had submitted to the UUA in other forms. Ministers had to deal with the possibility of multiple offers on the same day.

Now, we have a new MinistrySearch system. Information given to the UUA (during certification, for example) will now automatically be included in a searching congregation's record. Ministers' records will have their basic work history and fellowship information automatically entered into their search record. The new system can now support most types of ministry searches (settled, interim, contract, developmental, and second ministry positions). Ministers and congregations should have a website, but not for search. Much of the information needed in a search website will now be shared through MinistrySearch records and a PDF file or a link to a Dropbox of documents. Our ministry is more diverse than ever, though issues of bias and supremacy still prominently exist (overtly and covertly) and require constant attention. And now there is a new search handbook to guide the process. The free market system still exists, and it is increasingly important for congregations and ministers to be authentic about their strengths and challenges. Compensation, geography, a realistic portrayal of health, and a willingness to build trust and civility are the leading qualities desired by ministers searching in a free market system. Congregations are looking for a minister who can share leadership with them in a quickly changing time, all too often while trying to hang on to the past.

The COVID-19 pandemic of 2020 has greatly impacted the search process. Transitions Office staff have made updates throughout this handbook to incorporate virtual options for various points throughout the search process.

## **How Search Hasn't Changed**

### Six Things to Know

1. Compensation (with benefits) still matters more than any other factor in a search.
2. Good preaching will almost always be what a congregation wants most in a minister (though what good preaching is varies from congregation to congregation—and few congregations tell ministers ahead of time what they believe good preaching to be).
3. Congregations expect ministers to be naturally pastoral. That has become truer as ministry has become more diverse.
4. Congregations and ministers believe their current search will be exactly like their last search (especially if it didn't go well). In reality, no two search years or experiences are alike.
5. Search committees often carry the anxiety for the entire congregation in the search process. This is a lot to take on. And often, one or two people on the search committee hold the anxiety for the search committee and the congregation. That is even more pressure. And it often shows itself in ways that wouldn't normally be defined as "worrying." This anxiety can also lead to the assumption that ministers are not anxious in the search process.
6. While words like "history of misconduct" and "after-pastor" are often a part of a congregation's history, most ministries succeed when the congregation and minister covenant to respect and honor one another. In theory, the most radical act of ministry is to do no harm and to build mutual trust. Yet most congregations and ministers rarely

state or acknowledge how critical this act is to successful ministry and fail to articulate their responsibility to continually make successful ministry possible. Some congregations may be completely or partially unaware of the history of ministerial misconduct in their own congregation.

## International Search

Any Search Committee from a congregation located in the United States that considers hiring or calling a minister who is not a U.S. citizen should make sure their congregation has its own 501c3 status. Please contact the Transitions Office for more information.

For ministers who are U.S. citizens and are considering moving to and serving in a Canadian congregation, a document with considerations for religious professionals moving to Canada exists. Please ask the Transitions Office for more information.

## E-Mail List

- The Transitions Office maintains email lists for each cycle of interim and settled search.
- Ministers may opt into email updates about the search process by logging into MinistrySearch and clicking the red “Stay Informed!” button on the right side of their dashboard. There will be an option to toggle this button to “on” for specific search cycles so that ministers may receive search newsletters from the Transitions Office.

[Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

- You do not need to be searching to be on the list. Candidates with the likelihood of entering this search cycle may sign up as well.
- Search committee members are automatically included if their email is in the new MinistrySearch system.
- Interim ministers who are subscribed to the interim-I listserv are automatically included on this list.

## FAQs

Why does the search process take so long?

*Because the entire congregation has a part in selecting the next minister, the process to get the entire congregation ready takes thought, time, and care, more so than if a CEO decides to hire someone. Imagine how much longer finding a professor would take at a university if every student had a say and got to vote. It takes intentionality to help a community move toward a 90% majority vote to call a minister whom the congregation hopes will stay for a number of years. The search process requires the congregation to engage in the emotional process of change and to move toward a new future together.*

Why can't we just get another minister now?

*You actually can get a contract minister, though often the pool of potential ministers is smaller and the ministries tend to be shorter in duration. Ministers seem to prefer a congregation that has done interim ministry and are less likely to look at contract ministry positions.*

What's the average tenure of a minister? Is there a minimum length I should think about to be called?

*Across denominations, seven years is the average length of ministry most often cited. Whether that's true or not is a good question. In your figuring, would you measure only ministries that ended to come up with an average or include those continuing? Regardless, ministers should not commit to a settled ministry unless they are prepared to stay for at least four years.*

I'm a minister in search while serving a congregation. When and what should I tell the congregation I serve about my search?

*Ministers need not inform the congregation they serve at all until they are named a pre-candidate for search. Once a pre-candidate, ministers should have at least one current congregational reference available to the searching congregation. Once ministers are announced as candidates, they must inform their congregation about this offer. Congregations must have time to apply for an interim minister.*

How many ministers and congregations are in search every year?

*The number of congregations over the last decade or so has ranged from 21 to almost 70. An average year has 45 congregations in search. Over the last decade, the number of ministers in search has ranged from 75 to 130. We've had as few as 50 ministers enter search before the first offer date.*

Our last minister was negotiated out. How will that affect our search process?

*Ministers in search are likely to ask a search committee what responsibility the departing minister(s) and congregation had in the ministry's end. Given that they are likely to talk to the interim minister(s), the minister(s) negotiated out themselves, and regional staff, search committees should be prepared to share their understanding of the ministerial departure and what happened. Also, the search committee should be able to share what the congregation learned as a result of the negotiated ending. Congregations unable to reflect on and learn from the ending of the last ministry during the interim time are likely to see fewer interested ministers during the search process. No one believes the negotiated departure was an entirely one-sided; everyone bears some responsibility.*

Do we have to spend all this money on search? I don't think we have the money for it.

*Again, contract ministry is an option, though in a contract ministry, the congregation has not invested in the new ministry in the same way. Still, most congregations are able to find the money for settled search and it's a worthwhile endeavor. The congregation should NOT fund this search by reducing the interim ministry compensation.*

## Calendar

See the [Transitions website](#)

## Forms and Links

[Video Version of Settlement Handbook](#)

[Board Search Checklist](#)

[UUMA Guidelines](#)

[Second Ministry Search Handbook](#)

[Transitions Support for Congregational Staff](#)

[Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

## Other Related Information

- **CASE STUDY**

What makes for a successful ministry? What would that be like for you, whether you are a congregation or in ministry? What do you need from the minister(s) or congregation to consider a ministry successful?



# **Phase One: Concluding a Ministry Well**

## **Background Information to Improve the Odds of Better Decision Making**

The most important and underrated act of ministry is leaving well.

This applies both to ministers and to congregations. All too many rush to end the ministry and move on to what is next without taking a moment to breathe and reflect. Yet nothing better sets the stage for a successful ministry to follow than the congregation and minister(s) ending the ministry as well as possible. This starts as soon as it is public that the minister(s) is leaving. How a ministry is remembered, how the story of the ministry is told, shapes the next ministry. This is a moment for the congregation to remember that people will need time to be able to move forward, that not everyone is moving at, or should be moving at, the same pace. For many, this will involve grief—grief over the loss of the ministry, and, in some cases, grief over what the ministry could have been.

Congregations and ministers that take the time to conclude a ministry well, to express gratitude and good wishes, set themselves up for a better next ministry.

## **Key Elements**

### **Saying Goodbye Well**

Once it is known that the ministry will end, congregations and ministers should take some time to express gratitude for the ministry, celebrate what was accomplished together, and wish each other well on what is to come. While there are often lots of other preparations to attend to as the congregation moves toward an interim ministry, and ministers focus on their next ministry, work, or retirement, the importance of pausing to honor what has transpired in the ministry should not be seen as trivial.

Without question, very few people, whether ministers or congregants, are taught how to say goodbye, let alone how to do it well. People will need to do this in their own time and own ways. Congregants will want to talk to the minister. This is a very pastoral time, which is as it should be. This is often a time when members who had expected a minister to preside at their memorial service will want to talk with the minister, or a youth will need to say thank you for talking with them through a rough time. Congregants will want to reflect with the minister about how they were there to bury a parent, perform a marriage for an adult child, or bless a newborn. Ministers and leaders will want to reflect on what was accomplished.

If an ending of a ministry was abrupt and without people having had a chance to say good-bye, both the minister and the congregation may need additional time to be able to move on to the next ministry. Abrupt endings have often led to significant anger on the part of a congregation and minister, which have followed each into their next ministry, often with unintentional negative effects and consequences.

If the ending of a ministry was complicated or hard for the congregation or minister(s), this will not be true for all involved. While some may have had difficulties, others will remember a kind word, a sermon, or a prayer that stuck with them. If the ending was particularly hard, this is not a time to punish. Covenants and policies about behavior are likely in place to set good boundaries. Congregations needing additional help should be in contact with regional staff. Ministers should be in touch with colleagues. Hard times like these usually require objectivity from outside the congregation.

Most ministries end with all finding appreciation for the ministry in at least some way. Both ministers and congregations are reminded that the ministry doesn't end at the announcement; rather, the ministry just takes a different form. Very few ministers and congregants think about the end of a ministry when a ministry starts, yet this is the one element most likely to affect how the ministry will be remembered.

## **Notice of Ministerial Transitions**

Once the announcement is public, congregational presidents/administrators should complete the [Notice of Ministerial Transition](#). The form will alert both regional staff and the Transitions Office that the information is public to the congregation and that the process needed to move toward interim ministry can begin.

## **UUA Staff Support**

Core UUA staff members providing direct transition support to congregations and ministers:

- Emily Cherry, Transitions Administrator: sends communications from the Transitions Office, initiates congregational records in the MinistrySearch system, maintains records, helps search teams use the MinistrySearch system
- Rev. Patrice Curtis, Transformational Interim Ministries Director: works with interim ministers to support them in their role as change agents, provides support for inclusion work throughout the search process
- Jan Gartner, Compensation and Staffing Practices Manager: member of the Office of Church Staff Finance staff group who provides the most support for ministerial transitions, manages compensation consultants, provides guidance on equitable compensation and benefits
- Rev. Keith Kron, Transitions Director: holds the ministerial transitions portfolio for the Ministries and Faith Development staff group, manages Beyond Categorical Thinking and Targeted Ministry programs, main contact for ministers in search
- Christine Purcell, Transitions Program Manager: holds the ministerial transitions portfolio for the Congregational Life staff group, main contact for search committees and boards in search, manages search committee retreat leaders, member of the Congregational Life Leadership Team

The five regions of the United States and the two regions of Canada have staff ready to assist congregations at a time of transition. From the UUA's Congregational Life staff group, the Transitions Program Manager, in collaboration with your regional staff, will guide your congregation's leadership through the process as you move toward the next ministry (in Canada, it's simply your regional staff person). This includes sharing an overview of the timeline and process of search, conducting exit interviews, assigning a search committee retreat leader, and providing a listening ear and support throughout the search process. They often assist with the interim ministry search as well, though often the Transitions Office is more directly involved due to the short timing.

### Transition Program Managers

Canada East	Linda Thomson	<a href="mailto:linda@cuc.ca">linda@cuc.ca</a>
Canada West	Joan Carolyn	<a href="mailto:joan@cuc.ca">joan@cuc.ca</a>
Central East	Christine Purcell	<a href="mailto:cpurcell@uua.org">cpurcell@uua.org</a>
MidAmerica	Christine Purcell	<a href="mailto:cpurcell@uua.org">cpurcell@uua.org</a>
New England	Christine Purcell	<a href="mailto:cpurcell@uua.org">cpurcell@uua.org</a>
Pacific Western	Christine Purcell	<a href="mailto:cpurcell@uua.org">cpurcell@uua.org</a>
Southern	Christine Purcell	<a href="mailto:cpurcell@uua.org">cpurcell@uua.org</a>

### Which Type of Search Should Our Congregation Engage?

Your congregation's leadership and ministry will be held in care by a team of UUA staff members as you move into your next ministry search. Before your ministry search begins, Congregational Life and/or Transitions Team staff will meet with your leadership to discuss your ministry needs, context, and history. UUA staff will customize a recommendation for your congregation's transitional ministry search to try to ensure that your ministry needs are met and to increase the probability that your search will not end in a brief, conflicted ministry match.

For many years, after difficult ministry endings, ministers have been required to engage a UUA hold or review process, which sometimes includes professional development or personal work, before engaging their next ministry searches. The UUA policy of reviewing the congregation's needs, context, and history and recommending an appropriate type of search before initiating a ministerial search adds mutual, congregational accountability to the search process. By pausing to reflect with congregational leaders at the end of ministries, especially those which ended in conflict, before rushing toward ministry searches, the UUA Congregational Life staff team hopes to support congregational leaders in making decisions that will yield sustainable, vital, future ministry matches. Beyond recommendations for ministry search, this support could take many forms and be ongoing: coaching, training, leadership experiences, the Hope for Us conflict engagement process, UU Leadership Institute courses, etc.

A certain type of ministry search may not be recommended for a congregation immediately simply because it is the one the congregation has always engaged in the past. Other types of ministry search should not carry a stigma because they might indicate some work that is ongoing or needs to be done by a congregation.

Types of transitional ministry search:

- **Contract:** the simplest and most flexible type of ministry search. While this is a transitional ministry, and begins with a board hire, it may lead to a congregational call if a good match is made.
- **Interim:** a transitional ministry (board hire), usually 2 years long, between settled ministries (congregational calls) or before a developmental ministry. Congregations may not call interim ministers.
- **Developmental:** a transitional ministry (board hire) recommended by Congregational Life staff or an interim minister, usually 4-7 years long, during which the congregation works on its cultural change goals with an experienced ministry partner. Congregations may not call developmental ministers.

After engaging an interim or developmental ministry, your congregation may be ready for a settled ministry search:

- **Settled:** the search is conducted during the last year of an interim or developmental ministry, and culminates in a congregational call of the candidate identified by the settled search committee.

Just as UUA staff considers the history, skills, and traits of ministers when making recommendations for their searches, congregational history, traits, and preferences inform recommendations for congregational searches (not an exhaustive list):

- How the current/last ministry went/ended
- Evidence that past interim work has continued into settled ministries
- Level of self-awareness and accuracy of self-representation in past searches
- Evidence of healing from trauma in congregational dynamics
- Conflict transformation skills
- Turnover rate of religious professionals
- Ability to take responsibility for and learn from the congregation's part in past conflicts
- Good ministries and endings with religious professionals with marginalized identities
- Openness about ministry endings (participating in exit interviews, no non-disclosure agreements)
- Respect and trust for professional ministry partners
- Understanding of congregation's shared ministry obligations, and appropriate expectations of ministerial partners
- AR/AO/MC commitment, including participation in Beyond Categorical Thinking during settled search
- Relationship with the UUA and Annual Program Fund
- Stability of leadership structure
- Sustainability of professional ministry (less than full-time is automatically a contract ministry search)

- Whether UUA curation of the list of applicants (ministers with full fellowship or a particular type of experience, for example) would be beneficial and welcome for congregations with significant conflict or misconduct
- Cultural change work the congregation wants or needs to engage
- The congregational understanding of Unitarian Universalist theology
- The understanding of the discipline and practice of covenant

## **Church Website and Social Media**

Congregations should be aware that as soon as it is public that their minister(s) is leaving, ministers begin checking out what they can learn about the congregation from the congregational website. Now is a good time to review the website to see how current the information is, and to see what information will need to be updated and changed following the end of the ministry. The same is true for social media.

## **Exit Interviews**

Regional staff will conduct exit interviews with both the departing minister(s) and congregational leadership. This is information that is shared with the Transitions Office, regional staff, the interim minister(s), and the next settled minister. Ideally, these are completed prior to the end of the ministry, or at least before the arrival of the interim minister.

Exit interviews allow for reflection and storytelling and are often a part of bringing closure to the ministry and setting the stage for upcoming ministries.

Here are the questions we use:

- What went well during this shared ministry?
- What were the biggest challenges during this shared ministry?
- What did you learn during this shared ministry?
- Why did the ministry end?
- How was conflict handled during the ministry?
- How was the ministry shared between the minister, staff, and lay people?
- Were there any cultural shifts in the congregation during this ministry?
- What are your hopes for the future of this congregation's ministry? Concerns?
- Is there anything else you would like the UUA to know?

## **Budget Considerations for a Settled Ministry Search**

Our UUA recommends that congregations with settled ministers put aside funds during every year when they are not in search to prepare for sabbatical coverage or for their next ministerial search. The costs below are representative of the amounts which should be budgeted for the interim ministry search through the beginning of the next settled ministry.

- Relocation expenses for interim minister: up to \$10,000
- Search committee budget: between \$10,000 and 18% of the projected salary and housing amount for the settled ministry
- Settled ministry search support: \$1,000 - \$3,500 The amount is determined by the congregation's level of support of our Association's Annual Program Fund (APF)
  - Standard cost of search support: \$3500
  - Discounted support cost for congregations which have contributed 85% or greater of the APF Honor amount over the last three years: \$2000
  - APF Honor discounted support cost for congregations which have contributed 85% or greater of the APF Honor amount over the last three years: \$1000
- Relocation expenses for settled minister: up to \$15,000
- Installation: up to \$3,000

### **Interim/Transitional Ministry**

Almost all congregations decide to have an interim ministry between settled ministries. Most ministers searching for settlement expect and rely on an interim/transitional ministry to follow a settled ministry.

For more information, please see the [Transitional Ministry Handbook](#).

### **Why You Don't Form a Search Committee Immediately**

Historically, the selection of a search committee happens between the middle and the end of the first year of interim ministry, when the congregation has begun to shift from looking backward and reacting to the last ministry to looking toward the future. So, for example, if you anticipated the call of a new settled minister in August of 2022, you would form your search committee in the spring of 2021. This timing allows the congregation to do its necessary work of saying good-bye and moving into interim ministry. Often, at the time of end of a settled ministry, a congregation's anxiety is high. A search committee is likely to work better on behalf of the congregation after the anxiety has settled, once the interim work has begun, and when the congregation elects them from a position of looking forward, not backward.

## Timing

It takes longer to say good-bye, and to do it well, to a ministry than most people would imagine. Individuals are likely to say, "I'm ready to move on." But a congregation is a system of people, and moving systems takes longer than moving individuals. Some people may never be completely ready to move on to a new minister, but when "a tipping point" number of people are ready to move forward, the congregation is likely to be ready. Some people just need more time. Allowing people to move at their own pace is an act of community.

A metaphor for the length of a previous settled ministry: when you break a bone at 20, you heal quickly, especially compared to a 70-year-old person. The longer the ministry (the older the person who broke a bone), the more time is needed. The broken bone metaphor holds true on how complicated/traumatic the settled ministry was--how badly is the bone broken? A fracture will take less time than a bone that is shattered. The more difficult the ministry, the more time needed to heal from it.

That said, extending the metaphor: sometimes a hidden and slight fracture is often ignored, there is a rush to do too much too soon, and a reinjury is more likely to occur.

Patience and kindness are your allies here. Help everyone to be a part of a good ending to a ministry. This ultimately serves the congregation and departing minister(s) better.

## FAQs

Our minister is retiring. Can they come to church and be our friend?

*Any departing minister must make a covenant with the incoming minister, and then each subsequent minister. Most ministers know to stay away during the interim time to allow the congregation to more easily move to its next ministry. Even ministers given Emeriti status almost always stay away. Congregants should not ask for ministerial services from the departing minister. The departing minister should discuss this with the incoming ministers and establish clarity within their covenant about boundaries and acceptable practices. Ministers are expected to know the guidelines and to honor their responsibility to other ministers. Ideally, the outgoing minister has developed a system of support outside the congregation, whether it be friends or family. If your minister is staying in town, and you see them in public, you are, of course, free to say hello. But the outgoing minister knows it is no longer their role to be your minister.*

Our minister has asked us to make them minister emeritus/a. What does that mean and how do we consider it?

*[Minister Emeritus/a policies](#) can be found on our website. In general, these conversations and decisions better serve the congregation before the interim ministry begins or after the interim ministry has ended. Any minister emeritus/a should form a covenant with the current serving minister of the congregation.*

Should we take the ministers' sermons down from our website?

*In an ideal world, ministers have their own websites where their sermons are posted. In this case, the link to the ministers' websites should be removed from the church website by the end of the ministry.*

Do congregations ever do something else than interim ministry?

*Some congregations, in working with regional staff and the Transitions Office, do get recommendations for other options to consider. And while there is congregational polity, UUA staff hold the big picture about what works best for congregations. A successful call for a settled ministry is most likely to happen after at least two years of interim ministry.*

## Calendar

Minister announces departure (recommended)	Feb-Mar
Congregation submits Notice of Ministerial Transition	Feb-Mar
Consultation with Transitions Office/regional staff	Feb-Mar
Church website review	Feb-June
Exit Interviews with minister and leadership	Mar-Aug
Interim ministry application and search	Mar-May
Interim ministry begins	August 1st
Board meets with Transitions Program Manager	Spring

## Forms and Links

[Notice of Ministerial Transition](#)

[Transitional Ministry Handbook](#)

[Minister Emeritus/a Policies](#)

[Board Checklist for the Settled Search](#)

## MinistrySearch System

The interim ministry search process occurs within the MinistrySearch system. The congregation's president or their designee will request the initiation of an interim search by emailing [transitions@uua.org](mailto:transitions@uua.org). Interim searches may be initiated as of February 1<sup>st</sup>. Settled searches may be initiated as of June 15<sup>th</sup>.

Initiating a search means opening up a congregational record (CR) on MinistrySearch. When search committee members log into their dashboard, also called "Application Portal" at the top of the page, they will see blue hyperlinked sections of questions to click and complete; the application portal and dashboard are the same thing, and all of the information therein constitutes the congregational record.



## Other Related Information

### Case Study: Moving On

“Now that the minister is leaving, we just need to get another minister right away. We know we want someone exactly like this minister (or who is the exact opposite of this minister). Let’s just form a Search Committee and find someone,” says one member of the congregation. How would you respond?

### Discussion: Your Last Ministry

In your last ministry (either for ministers or congregations), what did you do well, and what do you wish you’d done better?

## **Phase Two: Education and Preparation for Search**

### **Background Information to Improve the Odds of Better Decision Making**

No two searches are alike. There are various factors that affect each search cycle—the number of ministers, the number of congregations, the size of the congregations in search, geography of the congregations in search, and the cultural context at the time of the search. Perhaps most importantly, neither ministers nor congregations are in the same place as they were when last they were in search.

Education and preparation for the search also asks congregations and ministers to do some reflection—to notice where they are at this moment. Each should ask the question, “What kind of ministry is needed now?” Also, “How are we (or “how am I”) different than the last time we were in search?” Congregations and ministers able to assess these questions with some thought, depth, and self-awareness are more likely to succeed in the search process than those who rush.

Ministers want to work with a new congregation that has taken its time to answer these questions, that can reflect honestly about what the congregation needs in ministry, what its strengths and challenges are, where the sore spots are covered up by bandages, where “stuckness” resides, and where hope needs to be kindled or even rekindled. Ministers want to know that their skills can be well utilized here, that the challenges of a congregation are the challenges that excite them professionally, and that the congregation can identify what work it needs to do and where a minister can help.

Ministers do provide a lot of answers to congregations, but they alone do not have all the answers. The congregations that serve themselves best in the search process are clear about what they need from a minister and about the fact that the minister is not the answer to everything they need. In some ways, congregations are best served by ministers who help congregations be their own problem solvers and who know when to get assistance or resources from outside the congregation: from the denomination, the wider community, or other ministerial colleagues.

Ministers serve congregations and themselves best by knowing their own strengths and limitations, too. Ministers who know they can't do something and say so better serve a congregation than ministers who say they can do something and cannot. Often, the biggest obstacle for ministers is time—the time to get everything done and done well.

This is often hard for a congregation to understand since so much of ministry is invisible or seen as superfluous. It is often hard for a congregation to recognize the amount of pastoral care it needs. Indeed, most congregations underestimate their pastoral care needs, often significantly, and thus underestimate their spoken expectations whilst still expecting this care to automatically happen. To be fair, ministers can also underestimate how much time and skill are needed for pastoral care.

Rev. Robert Fulghum once wrote, “To pay attention is to sanctify existence” (from *Beginning to End: The Rituals of Our Lives*, Villard Books, 1995). Sanctifying existence is a huge part of ministry, and paying attention is harder pastoral work than most people understand.

Paying attention to the entirety of the search process from beginning to end will improve the odds of a better search. Educating and preparing for search is vital. Has the congregation done the interim work to look toward a new future? Was the search committee selected in a way that engenders trust from the rest of the congregation? Has the minister set up a website and talked to other colleagues who have searched to find out what they learned?

The ministerial search process can feel overwhelming, especially when congregations and ministers rush. Learning about the flow of the search cycle, breaking down the process into phases, and doing each element within each phase helps make this process more manageable.

## **Key Elements**

### **Congregational By-Laws**

The congregation's leadership and interim minister should research the congregation's by-laws about the search process. If the search process is mentioned in the by-laws, ideally the by-laws simply state that the congregation should follow recommended practices of the UUA. The board may want to discuss these by-laws with the Transitions Program Manager in initial conversations about the search.

### **Board Overview of the Ministerial Search Process**

The Transitions Program Manager meets virtually with and holds open office hours for governing boards (and any other leaders/staff they choose to invite) during the winter after the interim ministry begins. The board should request a call with some advance notice if they would like this conversation to be held during a board meeting. The Transitions Program Manager provides an overview of the search process which includes:

- A conversation about any by-law requirements that may be inconsistent with current recommended practices. It is not uncommon for a congregation to update and amend their by-laws to follow recommended practices.
- Resources on the Transitions website
- Access to the MinistrySearch system
- The use of a compensation consultant
- Budgeting for the search process (search committee, relocation)
- UUA compensation standards (legal requirements, salary and benefit recommendations)
- How to select a search committee
- Roles of board, interim minister, search committee, congregation in search process
- Confidentiality

- Ministerial agreement & a negotiating team
- Beyond Categorical Thinking program
- Previous ministers of the congregation/minister(s) emeriti
- Search committee orientation at General Assembly

The Transitions Program Manager can provide materials for a congregational overview of the search process, as well.

## Selecting a Search Committee

- The search committee should represent the entire congregation.
- The search committee should be trusted by the congregation.
- The search committee should be in touch with the changing nature of the congregation.
- The search committee should be responsible for developing a good process for itself, the congregation, and Unitarian Universalism.

Selecting a search committee is the work of both the leadership and the entire congregation. While congregational by-laws may indicate a procedure, and while congregations ultimately have the ability to make their own decisions, ministers are more likely to be interested in serving a congregation where the search committee is representative, trusted, in touch, and responsible to the entire congregation.

Many of our congregations do not have racial diversity that matches their surrounding community. “Representative” is not defined here as based on congregational identity statistics. It does not mean check certain boxes: one of this type of person; more of these (because there are more of them in the congregation); and one of this type of person (because we think we should). Nor is it the role of a search committee member who identifies themselves as part of a marginalized community to advocate for a candidate minister from a marginalized community simply based on a (perceived) shared identity. See the section on Beyond Categorical Thinking.

Years of trial by interim ministers and UUA staff members and volunteers who support ministerial search have yielded this recommended selection process:

The process described below can be time intensive. However, experience has shown that it produces good results and a high degree of respect and trust for both the new search committee and the board.

1. The board and probably the leadership development (a.k.a. nominating) committee divide up all the households in the congregation and place a call to every single household (some larger congregations use staff and other congregational leaders to spread out the calls).
2. Each household should be engaged in a conversation around these questions:

- What are the good qualities needed for someone to serve on a ministerial search committee?
- Who in the congregation works well with others?
- Who can represent and serve the whole congregation well (including looking out for the needs of children) and not just a piece or “faction” of the congregation? Who would have no “axe to grind?”
- Who knows (or can learn) the history and culture of the congregation, whether a member of long standing or relatively new? Who can use this history proactively instead of reactively on behalf of the congregation?
- Who has been and/or is active in the congregation and has demonstrated both responsible participation and responsible leadership?
- After a high salary, the most attractive quality a congregation can have is self-awareness – awareness of strengths and weaknesses, what the congregation is like at its best and at its worst, as well as on an average day. Who would be able to know and relate all this to potential candidates?
- After thinking about all of these questions, who would you trust to serve on the search committee on behalf of the congregation?

The board or nominating committee caller should take down the names listed in response to the last question.

3. Someone in leadership, perhaps the interim minister, needs to act as the “nag” who lovingly reminds the callers to get the calls made.
4. Someone on the board, a good data manager, collects all the suggested names from the callers and makes a spreadsheet, noting how many times every person suggested has been named. The whole board need not see all these data.
5. The data manager reports to the board the top 12-14 names. It’s best, if possible, to make a ballot list, taking into account any natural break in the numbers. For example, the top 13 people get mentioned more than 20 times. Person #14 is mentioned 16 times. The next three are mentioned 14 times. The natural break is after person #13.
6. Board members call this short list to see if these people are interested in running and if they agree to give up any other leadership position they hold if chosen for the search committee. **They should also check on their availability and commitment in the fall and winter (survey/cottage meetings through pre-candidating) of the search cycle. All search committee members should be available for all pre-candidating weekends. These weekends may happen either in person or virtually.**
7. It is helpful to have everyone on the ballot fill out an information sheet or prepare a short biographical statement that includes information about why they are interested in serving on the search committee. These forms or biographical statements together with pictures should be posted in a prominent location for at least a few days before the election. This is especially helpful in a large congregation where not everyone is readily identified by name alone.
8. A written ballot is prepared with the names listed alphabetically. The voting happens at a congregational meeting. Neither self-nomination nor nominations from the floor are considered.
9. Congregations may vote for up to seven search committee members. If someone who is appointed to the search committee later drops out, please talk with Christine Purcell. Canadian congregations should speak with Keith Kron.
10. At the end of the meeting the board meets in executive session and counts ballots. Up to seven search committee members may be elected; the board may choose how many members to elect and how many to appoint from the remaining names on the ballot. The

appointments are important. This part of the process improves the odds of diversity on the search committee instead of a search committee composed of just the seven beloved elders of the congregation. The broader the demographic the better, especially with regard to age, gender, race/ethnicity, and sexual orientation.

11. The board announces the search committee, never telling anyone – including the selected search committee members themselves – who was elected and who was appointed.
12. The next Sunday, the search committee should be introduced with some fanfare. There might be a commissioning moment during the service when the committee members are given a charge and they vow publicly to serve and take the charge seriously.

If you follow all 11 steps carefully and thoroughly, you are likely to achieve the best results. Congregations in which this process has been followed with deliberateness and integrity report having a search committee that is respected and trusted and one that serves the congregation well.

Ideally this process happens in the time span of a month to six weeks, usually beginning in March and ultimately elected no later than June.

Congregations of 150 members or fewer may consider using a smaller search committee of five or six members.

Alternate search committee members are not allowed. Should a search committee member be unable to continue after being elected, unless very early in the process, the search committee should not look to find a replacement. If the member who is unable to continue departs the search committee in the first few months, the search committee should check in with the Transitions Office or Transitions Program Manager for options. Search committees should remember that any work that isn't deemed confidential may be done by someone from the congregation who is not on the search committee.

## **Compensation Consultant**

Every region has [compensation consultants](#) – skilled volunteers who are trained and supported by the Office of Church Staff Finances.

Each consultant is prepared to talk with congregations about compensation and benefits in the ministerial search process. They can counsel you on salary and housing, benefits, relocation expenses, and best practices as you move into search. Congregational leaders are encouraged to contact their compensation consultant by the time of the first Coach visit to get information and recommendations early in the process, rather than later. The compensation consultant can help with other staff compensation issues (which often arise during the ministerial search process) as well as advise the congregation on how to be most competitive and appealing in the search process (hint: compromising on benefits is a really bad idea).

For more information about compensation issues in general, please go to the UUA's [Compensation Resources](#) page. There you will find a link to UUA compensation standards (legal requirements, salary and benefit recommendations).

Feel free to contact your compensation consultant more than once throughout the process. Your interim minister may be a valuable addition to these conversations.

## **Search Committee Retreat Leader**

The Transitions Program Manager will assign a retreat leader to lead the search committee retreat once the search committee is in place. The retreat leaders are usually ministers who have been through the search process or members of previous search committees. Historically, these retreat leaders were called “transition coaches” or “ministerial settlement representatives,” and had an on-going role with search committees. New laws covering consultant work in a few states, emerging and equitable consultant compensation policies at the UUA, and increased UUA staffing for transition support have necessitated a change in how volunteers support the search process.

Search committee retreat leaders are paid an honorarium for their service to our UU search process (covered by the search support fee paid to the UUA by the congregation). Board presidents may initiate settled ministry search support, including the search committee retreat, the Beyond Categorical Thinking workshop, and the settled ministry start-up using [this form](#).

## **Search Committee Budget**

The governing board sets the budget for the search committee. The budget should cover travel and hospitality expenses for three pre-candidating weekends (if in person), travel and hospitality expenses for candidating week (if in person), video conferencing services, search committee retreat expenses (site rental, meals if in person), and other miscellaneous items (supplies, etc). If you are in an area with higher lodging costs or if airfare to your area is expensive, consider budgeting a bit more.

Other expenses related to ministerial search are relocation expenses and, often, within a year after the call, installation expenses. However, those expenses are not part of the search committee budget. Relocation expenses are generally left to the negotiating team, and installation expenses are part of the following year’s budget.

Sample budget considerations:

- Search committee budget: between \$10,000 and 18% of the projected salary and housing amount
- Settled ministry search support: \$1,000 - \$3,500 (see below)

The Transitions Program Manager can talk with board leadership about search budgets, should questions arise.

## **The Cost of Settled Ministry Search Support**

Our UUA invests hundreds of thousands of dollars each year to support ministry searches across our denomination. In addition to staff dedicated to transitions work, we provide an updated, custom MinistrySearch platform, and coaching throughout the search process (including a search committee retreat, Beyond Categorical Thinking workshop for the congregation, and a new ministry start-up).

Congregational support of our UUA's Annual Program Fund allows us to budget for staffing and for the design, maintenance, and IT support for the MinistrySearch system. We ask congregations to help bear some of the expense for search support (such as the search committee retreat and search-related workshops).

With gratitude, we offer a substantial discount on coaching services to congregations which support our Association's Annual Program Fund at the Honor level, and a moderate discount to congregations which have supported the APF at or above 85% of our UUA's requested amount (3 year average). For congregations which are eligible for these discounts, our UUA budget is used to subsidize search support workshops.

- Standard cost of coaching: \$3,500
- Discounted coaching: \$2,000
- APF Honor discounted coaching: \$1,000

If your congregation has recently supported our APF below the 85% level, an Honor-level giving discount will be applied if you reach an Honor-level giving average of 85%-100% during the years of search.

If you're not sure about your congregation's giving status, the board president may email Christine Purcell, our Transitions Program Manager, at [cpurcell@uua.org](mailto:cpurcell@uua.org) before submitting the form to initiate settled ministry search support (below).

## **How to Request Settled Ministry Search Support**

The board president may initiate settled ministry search support by using [this form](#) once the search committee is elected. The search support fee covers workshops which support the settled search (search committee retreat, Beyond Categorical Thinking, and new ministry start-ups) for a clear arc of support and a streamlined congregational billing process. Once the form is received, the Transitions Program Manager will assign a retreat leader who will lead the search committee retreat between May and August.

## **Role of the Interim Minister(s)**

Interim ministry is an important part of the transitions process. So is the interim minister. The role of the interim minister in the search process is often that of pastor, resource director,



reference, practice partner, and colleague to ministers. They are not to be wedded to a particular minister or even to the outcome; this is the work of the congregation in the search process. Interim ministers can support the process of search.

Interim ministers, however, are ministers. They provide pastoral support for the congregation during the search process. Often, the interim minister has a brief check-in with the search committee (during the first 10-15 minutes of a search committee meeting, for example) to provide pastoral support and, if the search committee is particularly engrossed in the search process, to convey the status of congregational life. Examples include (without breaking confidences): discussions of the balance between search committee work and the rest of life, current frustrations and joys, and sharing news of recent events in the congregation that the Search Committee might not know.

Interim ministers can also be a resource for the congregation, if asked. Whether it be for regional contacts, preferred language for contracts, or other ministerial questions, even a sense of what grief exists in the congregation about a particular minister, interim ministers can assist the congregation and search committee with such questions. Interim ministers should not be asked, let alone answer, questions about specific ministers. Additionally, searching ministers should never ask a congregation's interim minister to be a reference for the congregation the interim serves.

Interim ministers can be good practice partners for mock interviews with the search committee. Interim ministers may give useful feedback on the congregational record in the MinistrySearch system.

Searching ministers are encouraged to call the current interim minister at any time to inquire about the congregation. Interim ministers should answer questions they are directly asked. Search committees may ask prospective ministers if they have talked with the interim minister(s). Interim ministers may tell search committees how many ministers have contacted them.

The interim minister(s) may meet with a minister(s) during the pre-candidating weekend if the schedule allows. The interim minister should meet with the candidating minister(s) in or before the candidating week. The interim minister should covenant with the newly called minister(s) on how to support and not overburden the colleague during the transition time.

## **Congregational Website**

Congregations are encouraged to ask for "outside help" regarding their website. Regional staff, interim ministers, and other ministers known to the congregation, for example, could all be asked to take a look at the congregation's website to identify what the website might express intentionally and unintentionally to prospective ministers.

Additionally, some congregations have made a section of their website a place for search information, search timeline, and search announcements to update the congregation on the process of search.

## Ministerial Website

All ministers, in search or not, should have a website that is not specific to ministerial search.

The website should be the public presence of a Unitarian Universalist minister in the wider world. The website should include photos, a biography, sermons (written, audio, video), and anything else the minister would like to include. Some ministers include information about weddings, funerals, memorial services, and child dedications. Many ministers post their blogs and minister's columns on their website and often there is included some vision for Unitarian Universalism.

Search committees have repeatedly wanted access to view and experience ministers' sermons more than any other information.

Reverend Linda Berez has created a [template for UU ministerial websites](#) and is available for consultation.

## Confidentiality

A reminder on the importance of confidentiality throughout the process—the search committee will be expected to keep the names of all applicants confidential from the congregation and its leadership until they are ready to announce the name of the candidate. Breaches of confidentiality have led ministers to withdraw their consideration from congregations and have even ended the search process for the congregation.

## Other Ministers in the Congregation

The interim minister, any other ministers on staff, retired ministers in the congregation, and any minister emeriti are bound by UUMA guidelines in the search process around collegiality and confidentiality. They often serve as references to the congregation for potential ministers, though they are to keep these conversations in confidence. No minister on staff or in the congregation should be asked to serve as a broker to prospective ministers, but instead should encourage searching ministers to apply through the MinistrySearch system.

## FAQs

Can a member of the board serve on the search committee?

*This is a conflict of interest. The search committee is both independent and accountable to the board of trustees. A congregational member could do one, but not both. Staff and spouses of staff should also not serve on the search committee.*

Shouldn't our congregation just select one person from each of the major committees to serve on the search committee?

*No. The search committee should have the trust of the entire congregation. The search committee will be in conversation with the congregation about the needs of groups and committees within the congregation early in the search process. Any search committee that ignores or pays less attention to an aspect of congregational life does not serve the congregation well. In some cases, there may be more groups in the congregation than search committee members.*

One of our members really wants to be on the search committee but did not get mentioned enough times to be on the slate of candidates. Can they nominate themselves from the floor?

*While they probably can do this, if it's in the congregational by-laws, it's not recommended. It goes against the trust the congregation was trying to build in the process. Encourage the member to find other ways to serve in the search process or congregational life.*

What additional resources are there?

*Every year at General Assembly, the UUA Transitions Office holds a private gathering open to board members and search committee members. If you have board members or search committee members who wish to attend, please contact [transitions@uua.org](mailto:transitions@uua.org).*

How can ministers best learn about congregations they might be interested in?

*Looking at a congregation's website is a good start. So is talking with the interim minister and previous ministers who have served the congregation. Look for congruency. Are the issues, challenges, and patterns described the ones you want to be dealing with as their minister?*

## Calendar

Review congregational by-laws	Winter
Transitions Program Manager provides an overview of search	Feb-Apr
Consultation with compensation consultants (review Employer's Participation Agreement on file with the UU Retirement Plan)	Feb-Apr
Approve budget for search committee	Spring
Church website update	Spring
Sign up for settled search support	Spring
Search committee selection	Apr-Jun
Search committee reviews Settlement Handbook	Jun 15-July
Search initiated and posted on UUA website	After June 15

## Forms and Links

[Finding a Compensation Consultant](#)

[General Compensation Information](#)

[Request Settled Ministry Search Support](#)

[Ministerial Website Template](#)

[Visual Guide: Initiating a Search & Logging into the MinistrySearch System](#)

## MinistrySearch System

Once the search committee is selected, one member of the committee should contact the Transitions Office ([transitions@uua.org](mailto:transitions@uua.org)) to request the initiation of a search in the MinistrySearch system. New searches will be initiated after **June 15<sup>th</sup>** each year to allow for the Transitions Office to make adjustments to ministerial and congregational records as needed. This will coincide with the June 15<sup>th</sup> updated release of the Settlement Handbook for each year.

To initiate the search, the Transitions Office needs the name and email address of one search committee member whose email address is recognized by the UUA's data management system. If the email address is NOT recognized, the system will provide additional steps for gaining access.

Once you have received acknowledgement that the MinistrySearch system has initiated the search, the contact may add other members of the search committee into the system using their preferred email addresses. No one other than current search committee members should be able to access the system. Each search committee member will need to enter the MinistrySearch system and create their own password. Log-ins and passwords should not be shared amongst search committee members.

## Other Related Information

### Case Study: The Spouse of an Employee

The spouse of the administrator is a long-time member of the congregation (so is the administrator). They know a lot about the congregation, and someone has suggested to them that they would make a great member of the search committee. Someone else says this would be a conflict of interest. Why would it be a conflict of interest? Why might it turn some ministers away from the congregation as an option? Hint: This has happened.

### **Discussion: Can't Any Minister Serve Any Congregation?**

Can any minister serve a congregation? Does it really matter to go through this process? As long as there is good preaching and good pastoral care, why take all the time to go through the search process?

# **Phase Three: Building the Structure to Search**

## **Background Information to Improve the Odds of Better Decision Making**

The work of the search committee is threefold:

1. To earn and maintain the trust of the congregation.
2. To engage the congregation in the search process.
3. To represent the congregation to the wider world of Unitarian Universalism.

This is not the work of individuals, but the collective work of a team. One way the search committee earns and maintains the trust of the congregation is to work as a team, speaking with one voice to the congregation, in the congregation, and for the congregation.

The team can be, at times, wider than the search committee. While there are aspects of the search that require confidentiality, other pieces are coordinated by the search committee and benefit from congregational input and assistance. The search committee that maintains connections with the congregation throughout the search and asks for assistance (when it can) is doing important work. Search committees that isolate themselves from the wider congregation often carry more stress, engender less trust, and are less representative of the congregation as it evolves throughout the interim time.

The most common mistakes search committees make are isolating themselves from the congregation (both staying out of touch and lessening congregational involvement in the process) and inaccurately interpreting and representing the congregation by downplaying differences in order to present the congregation as being of one mind. Indeed, it has not been uncommon for one experienced minister to ask the newly settled minister of a congregation, "You believed the search committee?" Ministries have ended early because the one voice presented by the search committee was perceived as a mandate and, in fact, there was not unanimity.

Speaking with a single voice does not mean reducing your congregation to a single story. Indeed, the search committee that is able to share with one voice the multiple and sometimes conflicting stories of the congregation will represent them well and improve the odds of a better ministry.

## **Key Elements**

### **The Search Committee Retreat**

One person from the newly elected search committee should volunteer to serve as contact with the retreat leader to schedule the search committee retreat. Ideally, the retreat leader will have at least several weekends available from which the search committee can choose when scheduling the retreat. Ideally, the retreat is held by the end of July, though sometimes an August date is necessary.

The retreat should be scheduled when all search committee members can be present.

The best option for the retreat is for it to happen on a weekend when the committee can be off-site (away from the congregation) together, with three hours one evening and three or more hours the next day. Some retreat leaders and committees find that a longer Saturday session is needed and best. Check in with your retreat leaders about scheduling.

Other options that are less desirable (but have worked, occasionally) are a long session in one day or sessions on two consecutive evenings. Historically, search committees have reported the most satisfaction when the retreat involves time for reflection, casual conversation, and a sense of fun. Location options include a nearby retreat center, a state park, a hotel, or any place where interactions are social and lead to more connection, bonding, and fun.

A virtual option can work, also, with either the retreat leader engaging the committee remotely, or everyone joining virtually. Virtual search committee retreats have been done mostly spread out over two or three days in two or three-hour intervals. Search teams have already used video over the years to meet remotely, or to include one person who was traveling. Interestingly, the technology seems to lead to shorter meetings and some parents of children report they might consider being on a search team if they don't have to meet in person.

The retreat has three to four major goals:

1. To come together as a team, get to know one another better, and to learn about people's working styles and thoughts on the congregation and search process
2. To examine the roles and tasks necessary for the search committee's work on behalf of the congregation
3. To begin work on a covenant about honoring the search process to serve both the congregation and Unitarian Universalism. This covenant is a living document and you may add to it as the work unfolds
4. If time permits, to begin to contemplate how the members will work together, make decisions, and support these decisions as the search committee

Specific discussion items pertinent to the last goal to be discussed at either the retreat or at an initial meeting with the Search Committee following the retreat:

1. Schedule—how often to meet, and how and when to meet (virtual meetings may be more inclusive for some people juggling work and family)
2. Expectations about what to share with the congregation and what is confidential
3. How identity plays out on the search committee, especially when one or more people have an identity that has historically been marginalized
4. How to incorporate the congregation, board, and interim minister in the work of search

## **Covenant**

All engaged in the search process are asked to enter into covenant with each other, our congregations, and Unitarian Universalism. This new requirement centers a key component of our Unitarian Universalist faith-- the sacred promises we make to one another-- in the vital work of ministry search.

The search committee chair or their designee will review the covenant with the committee, then enter into the covenant by indicating so on their congregational record. A copy or acknowledgment of the covenant should be included in the documents packet.

Ministers also enter into a search covenant. Ministers in search who have not indicated so on their ministerial record on MinistrySearch will not have their name released to congregations.

## **The Work of Ministerial Search**

The pieces of the search process are significant and extend beyond the search committee.

The search committee needs to decide who will hold certain roles and have oversight over certain tasks:

1. Chair/convener
2. Communications
3. Treasurer
4. Web specialist
5. Survey
6. Cottage meetings/focus groups
7. Beyond Categorical Thinking arrangements
8. Congregational record
9. Documents packet
10. Interviews
11. Pre-candidating weekends
12. Neutral pulpits
13. Hospitality
14. References
15. Candidating week
16. Negotiating team



## 17. Process observation

A note to search committees: some of these items are easily bundled into a larger role. They are separated here so that the list of tasks and roles is clear. Each search committee is free to combine and assign the roles in the way that works best for them.

A note to ministers: information here is also intended for you so that you can know what to expect from a congregation and from the process.

## Search Committee Roles and Tasks:

### Chair (All Year)

The chair or convener of the search committee monitors the work and progress of the search committee, setting meeting agendas, communicating with the board and interim minister, facilitating committee meetings, and acting as liaison to the Transitions Program Manager. The chair supports the work of the search committee with their tasks, as needed, is seen as leader by the congregation and search committee, and initiates (or is copied on) all communications with the Transitions Program Manager and Transitions Office.

Some search committees have elected co-chairs.

***Timing:*** *The task is ongoing throughout the search process.*

### Communications

The communications person is responsible for recording decisions of the committee and for sharing information with leadership, the wider congregation, and ministers. Often, one person is the minute-taker and decision-recorder for the group while someone else does the other pieces of the communication.

***Timing:*** *The task is ongoing throughout the search process.*

### Treasurer

Most often, this is the person in the committee who takes care of and maintains records of finances, making sure payments are made and that prospective ministers and search committee members are reimbursed in a timely way. A separate checking account should be set up for the search committee to maintain confidentiality of the pre-candidates.

***Timing:*** *The task is ongoing throughout the search process.*

## Web Specialist

The web specialist is responsible for oversight of the congregation's web presence during search. In addition to making sure the congregation's website and social media presence is up to date, the web specialist often creates a special section on the congregation's website specific to search. Content should include a photo of the search committee with at least names and a short biography. The congregation's survey results are also highly recommended for inclusion here. Some congregations have made sure there are photos of the building and grounds, people in the congregation, even photos of or links to information about the wider community for prospective ministers to see. Creativity is encouraged, as the website is a marketing tool. One congregation had their youth group make a short video for the search to help break down the stereotype that the church was full of only old and stuffy people. It may be helpful to congregants to include a calendar overview of the timing of the search. The documents packet may be shared here, as well, for both congregation and minister to see. Eventually, once the candidate is announced publicly, the web specialist can link to the minister's website.

Note: This is a public task in many ways and may be filled by a person or persons not on the search committee.

***Timing:*** *Much of this work happens in the first six months of the search process and even before the search committee is formed. Though not necessarily a large task, it is an important one, especially for informing prospective ministers about the congregation for informing the congregation about the work of search.*

### **Key Dates:**

- *Minister announces departure: First clean-up of website for accuracy and currency*
- *May-August: Search committee retreat--picture is taken and posted of search committee*
- *Late October/early November: Survey results posted for congregation to see*
- *When candidate is announced: Post link to minister's website*

## Congregational Survey

The congregational survey is a real opportunity for the congregation to move toward a different future with a new minister. The Transitions Office encourages the search committee to collect basic demographic data from individuals and to ask ministry-related questions, emphasizing what the congregation needs more than what the individual completing the survey wants from a future ministry.

Before the search committee begins the work of surveying and holding cottage meetings with the congregation, they should be sure to review all of the questions in the congregational record (including the questionnaire section). They need to be sure that they have a plan to learn what they need to learn before they represent the congregation to potential applicants.

Regional staff and the Transitions Office, in partnership with ministers and colleagues in UU identity groups, have revised the congregational survey for the 2020 search year and beyond. We update the survey slightly each year, based on feedback we receive from ministers and

search committees. We intended to present an inclusive and thorough analysis tool, and we are open to making needed changes. *Please do not use surveys from before 2020 without carefully considering questions with an equity and inclusion lens.*

While your search committee may start from scratch with a survey, we recommend that you consider using the survey we have generated, or as many parts of it as you can use or adapt, to assess your ministry context and needs. The Transitions Program Manager will make your search committee's survey coordinator an administrator on a copy of the Google Form we use for the congregational survey. Your search committee may use free add-ons to convert the survey to SurveyMonkey for familiar features and more robust data analysis, if you wish.

Once the newly created survey is ready, a link to the survey should be sent to all congregants. Most search committees allow about a month for completion and submission for the survey, with repeated reminders sent throughout the month. A return rate of at least 60% should be the minimum, though ideally this will be higher. The survey results should then be compiled and the results shared with the congregation.

Often, the results can be used to spur conversation for cottage meetings and focus groups. The survey results should be shared with the interim minister and Transitions Office. The survey will become part of the documents packet the search committee prepares. The results may also be posted on the congregation's website.

If a congregation in a second year of search did a survey the previous year, the search committee may elect to re-use the initial survey results.

An updated sample congregational survey is available in the Appendix of this document.

**Timing:** *Fairly intense work over the summer through October*

**Key Dates:**

- *Summer: search committee creates survey*
- *August-early October: Congregation completes survey*
- *Late September to Mid-October: Survey results shared with congregation, interim minister, and Transitions Office*
- *December: Survey included in search documents packet*

## **Cottage Meetings and Focus Groups**

Surveys are not the only way to collect information about the congregation, though they are a good place to start.

Cottage meetings are open groups of congregants invited to come to a group conversation (generally facilitated by search committee members) to provide an opportunity for people to hear and build on what others say.

One committee found that in its cottage meetings, only three questions were necessary: "How would you describe this congregation to its prospective ministers? To prospective members? To

a close, non-member friend?” Another committee used only two: “Looking back, after our minister has been with us a year, what will be your measures of success? What achievements will make you say you’re glad the minister is among you?” Other potential good questions ask about the congregational culture and the ministers’ role in the culture. One way to get at this is to ask people to reflect on the rules and customs they had to learn, both spoken and unspoken, as they joined the congregation. Follow that up with a question about what the new minister(s) should know about the congregational culture. Ultimately, the search committee takes the lead on determining the questions.

The meetings may be facilitated by a search committee member or someone they designate. It’s highly recommended that a search committee member takes notes on what is said for later use. Good process of encouraging all to speak, letting people finish their thoughts without interruption, and setting limits for individual speaking time is highly recommended, though a natural conversation in which people are sharing insights and generative thoughts should not be discouraged.

Multiple cottage meetings are encouraged, and search committees may implement sign-ups, meeting size limits, and meeting time limits to aid the process.

Focus groups differ from cottage meetings in that they are targeted at specific groups within the congregation. Typical focus groups have included parents, past presidents, youth, people of color, newer members, long-term members, staff (including the interim minister), retirees, previous search committees, and various committees and task forces, to name a few. The search committee would do well to figure out what groups are likely to feel left out if not included.

Questions in focus groups can start in the same vein as cottage meetings, though some conversation time should be about the particular group invited to meet. Again, facilitation and note-taking should be handled by the search committee, though delegation is an option here.

In an ideal search, both the cottage meetings and focus groups would be done after the survey results are compiled, so they could then be used as a springboard for further group conversation. A short summary report of the cottage meetings (perhaps a page) should be included in the congregational documents packet. The report should talk briefly about how the process was done and what key impressions were noticed or reinforced by the process. If information from the cottage meetings is included in the congregational record, it need not be duplicated in the summary report of the packet. But at a minimum, this is a chance for the search committee to be transparent with ministers about how the information was gathered in the survey and cottage meetings, how many cottage meetings were held and where, which questions seemed important to ask, and any other information that sheds light on the processes.

***Timing:*** Usually done in the second year of interim ministry. This is a fall activity, best done after the survey has been completed, though timing may necessitate some overlap.

**Key Dates:**

*August: Dates set for cottage meetings, advertising begins*

*August-September: Focus groups decided upon, scheduling begins with dates, facilitators and notetakers identified*

*September-early November: Cottage meetings and focus group conversations*

*Mid-late November: Summary report prepared for congregational record and, if needed, congregational documents packet*

## **Beyond Categorical Thinking**

Beyond Categorical Thinking (BCT) is a virtual program designed to help congregations in the ministerial search process. The weekend program is facilitated by trainer(s) from the UUA. Issues around race/ethnicity, gender/gender identity, visible and invisible disabilities and health concerns, and sexual orientation are addressed in the workshop. It is expected that search teams will hold a BCT weekend, and potential ministers are encouraged to seek out what a congregation learned. It is the responsibility of congregation leaders to be mindful of their personal implicit and overt biases, and to take active steps to counter systemic and personal biases during (and beyond) the interim period.

Beyond Categorical Thinking includes a three-hour virtual workshop for the congregation that is offered on Zoom. The congregation should provide someone to set up the meeting and serve as the technical host. If the search committee prefers having an in-person BCT workshop, the UUA will assess an additional fee from the congregation and reimburse the facilitator for all travel expenses. The fee structure and information about payment can be found on the [application form](#).

Congregational leadership may invite the BCT trainer to lead the worship service during the BCT weekend (the congregation should pay an [honorarium](#), as with all guest speakers). By completing the program, congregations send a message to all their members and potential ministers about their commitment to full equality and ongoing learning about anti-racism and anti-oppression.

Attendance is expected of the search committee, board members, and other church leadership, and strongly encouraged for all members. The search committee should coordinate with the interim minister to identify possible weekends. The search committee will need to identify a minimum of two weekend options, though three is ideal.

One person on the search committee agrees to fill out the application (often getting help) and submit this to the Transitions Office. Please submit applications **no earlier than June 1**. The Transitions Office will assign a trainer(s) and then facilitate the initial introduction between trainers and search committee contact person.

The Beyond Categorical Thinking program began in the 1980s at the request of ministers who found bias and prejudice in the search process. While not necessarily the same bias and prejudice as that time, ministers still face bias and prejudice in the search process. During search, a congregation must honestly assess if it is likely at this time to choose a minister from a marginalized community. A congregation is doing good work and moving toward transformation if it acknowledges and grasps the level of pervasive implicit and overt bias in its system and has committed to compassionately and actively challenging bias within the life of the congregation. Beyond Categorical Thinking looks at the current biases in our congregations and provides

opportunities for congregation members to discuss what they would do when these biases occurred in their congregation's ministry.

The search committee contact should check with their trainer about preferred workshop time and schedule. A virtual workshop is typically held in two 1.5 hour sessions—once on Friday night and once on Saturday morning/afternoon before Sunday worship. BCTs that happen in person should be on Saturday morning or afternoon. The search committee should schedule the workshop in person only when a three-hour block is available.

Often, there is a meeting between the trainer(s) and the search committee at some point during the weekend. Please check with your trainer about scheduling this.

The search committee contact for Beyond Categorical Thinking will also be given a link to a Dropbox folder that includes the handouts that need to be copied for the participants. There are also materials for children, if desired. Youth are encouraged to attend the workshop.

For more information, including the [application to request a BCT workshop](#), please visit the [Beyond Categorical Thinking section of our website](#).

After the BCT weekend is finished, search committees should complete the [evaluation](#).

The search committee should prepare a short summary of what they learned about the congregation for their documents packet. The application for a BCT weekend should also be included in the Documents Packet.

***Timing:*** *Scheduling should happen during the summer after June 1. The actual BCT should happen anytime from late August to December.*

**Key Dates:**

*June to September: Search committee completes and submits BCT application*

*August-November: Search committee and trainer(s) coordinate weekend*

*August-December: Training occurs*

## **Congregational Record**

The congregational record is located in the MinistrySearch system and is the search committee's opportunity to present itself to potential ministers. All search committee members have access to the content and questions of the congregational record, and the person(s) with the role of managing its completion should not be the sole responder to each question. Any search committee member can input answers to questions, and multiple people may work on the record simultaneously. All search committee members should have input into the final congregational record before it is submitted to the Transitions Program Manager for approval and release.

The information in the congregational record comes from several sources. Some of it is pre-populated from the congregation's last certification to the UUA. If pre-populated information is incorrect, please notify the Transitions Office. Some of the information may come from the

survey, cottage meetings, and focus groups. Some may be the collective wisdom of the search committee as a result of their election to represent the congregation.

The search committee may invite the interim minister and/or the congregation's regional staff contact to offer feedback on the congregational record. The interim minister and regional staff contact can suggest ways to balance the presentation of the congregation's unique strengths and challenges. The record should be submitted to the Transitions Program Manager for approval in time for her to read it and offer suggestions, and for edits to be completed before records are released to ministers on December 1<sup>st</sup>. Once the congregational record is publicly posted in this way, it should only be changed with the approval of the Transitions Office.

Information from recent, previous searches in the MinistrySearch system will be available to the new search committee who may (and probably will) change them. Search committees may email the Transitions Office to request access to records created between 2000-2018.

Tip: Creating the congregational record is not an exercise in putting your best foot forward. Search committees do the most good for future ministries by honestly describing the congregation, not by presenting a snapshot of the congregation at its best.

Ministers like to do ministry. This means ministers like to know what reality will meet them once they begin serving and, therefore, what ministry the congregation needs. If something is conflicted within the congregation, the record should depict that. If something has been neglected, the record should say so. That said, every congregation has positive features which should be shared, as well.

The search committee is encouraged to share the contents of the record with the congregation once approved.

*A blank copy of the 2020-2021 congregational record can be found at the end of this section and in the Appendix.*

## **Steps for Completing and Publishing the Congregational Record**

### [Visual Guide: Steps to Completing the Congregational Record](#)

1. Fill out each section of the congregational record (CR), clicking each blue hyperlinked section on the MinistrySearch dashboard to complete it. Be sure to press the "Save" button at the bottom of each section before leaving a page, if you have made changes.
2. Once each section of the CR is complete with a checkbox next to the section title on the dashboard, and the search committee feels that the CR is ready for review, click the "Complete Record" button at the bottom of the dashboard.
3. The search committee may generate a PDF of the CR (using print options) to share with the interim minister and/or the congregation's regional staff contact (regional staff can also access the CR through the MinistrySearch system).
4. Once any feedback from the interim minister or regional staff has been addressed, submit the congregational record for the Transitions Program Manager's approval by pressing the "Submit for Approval" button in the yellow box in the middle of the dashboard. The status will then show as "Awaiting Approval."
5. The Transitions Program Manager will log into MinistrySearch, read through each CR for clarity and consistency, and click to approve.

6. Once approved, the CR is ready to go live on the jobs board. CRs for settled search are released manually to potential applicant ministers by Transitions Office staff on December 1.

**Timing:** *Congregational records generally are filled out over the fall through mid-November.*

**Key Dates:**

*Summer: Congregational record questions are examined by search committee*

*Fall: Decisions are made on how and by whom questions will be completed*

*Mid to late November: Congregational record is completed and reviewed by entire search committee. Feedback is sought from interim minister and/or the Congregational Life staff contact*

*Late November: Congregational record is shared with the Transitions Program Manager for review and approval*

*December 1: Approved congregational records are made available for prospective ministers to view*

## **Documents Packet**

While the congregational record is a series of questions, the congregational documents packet is a collection of documents. The documents will give the minister concrete information from the congregation. One search committee member should take the lead on this task. These documents should be collected into an online Dropbox, Google Drive folder, PDF file, or a collection of PDF files that can be shared with each ministerial applicant once the names of the applicants have been released to the search committee. Any of these already online should be represented with a link via email to the ministerial applicant.

[Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox](#)

### **Required documents:**

- Proposed contract (due to Transitions Office by mid November)
- Contract change form (how it differs from the recommended UUA/UUMA contract and whatever else you'd like the applicant to know) (due to Transitions Office by November 30)
- Total compensation breakout information (Compensation Worksheet) (due to Transitions Office by November 30)
- Congregational survey
- Congregational by-laws
- Previous five years of congregational budgets and end-of-year reports
- Job descriptions for each staff member



- Covenant between interim minister and previous settled minister
- List of ministers who have regular contact with congregants
- Congregational covenant
- Staff covenant
- Annual report
- Minutes from last three congregational meetings
- Minutes from governing board over last year
- Policies if separate from by-laws (safe congregation, disruptive behavior, etc., if not on website)
- Several orders of service (include Christmas Eve, Easter, and other special holidays too, if possible)
- Copies of sample newsletters, email blasts, and other regular announcements that go to congregation
- Beyond Categorical Thinking application and any reflections you took away from the weekend experience

**Optional documents:**

- Longer summary report from survey and cottage meetings
- Timeline of congregational history
- Link to video tour of congregational building
- Year-to-year history of Governing Board members for last 20 years
- Sample information given to new members
- Current long-range plan (if it exists)
- Biographies of search committee members (if not on website)
- Anything else the search committee wishes to include
- Organizational chart
- Information given to parents on religious education/exploration opportunities

**Timing:** *These should be ready to be reviewed by the Transitions Program Manager by mid-December*

**Key Dates:**

*Summer/Fall: Search committee agrees which documents to collect and share beyond required documents*

*By December: Documents are gathered and captured electronically for sharing*

*December: Documents packet is approved by Transitions Program Manager*

*January: Documents packet is distributed to each applicant whose name was sent to the search committee*

## **Interviews with Prospective Ministers**

The search committee will hold interviews at two different times with prospective ministers. The first set of interviews is the initial set, usually done by video or conference call after the search committee has looked at all applicants and decided whom they would like to pursue further with an interview. Generally, these interviews are done via video or conference call and last about an hour, with at least 15 minutes for questions from the applicants. The second set of interviews happens over the course of the pre-candidating weekend. Generally, the whole committee has a three-hour interview with the pre-candidate on Saturday and then a follow-up conversation/interview after the service on Sunday at lunch. The entire weekend has an interview component as part of it.

The search committee has the option of appointing a person to oversee the interview process. Quite often, the chair does this (though it does not have to be the chair) or the search committee does this as a group.

If possible, video interviews should be done when all search committee members can participate. On occasion, when this is not possible, the session could be recorded, with the ministers' knowledge and approval, and shared with the missing committee member. These are usually done in mid-to-late January.

Pre-candidating weekends (usually February and March) should only be scheduled when all search committee members can participate.

Interview questions should be standardized so that all interviewees are asked the same set of initial questions. Follow-up questions specific to interviewees and specific to their materials are fine, but the framework should be the same for all interviewees. It is important for search committee members to remember that the questions they ask give information to prospective ministers about the values of the person asking and may also reflect the values of the search committee and congregation. It's important for a search committee to notice which questions they are asked by prospective ministers.

Search committees are encouraged to tell ministers they wish to interview the structure for the interview in each setting. Questions can be given to ministers in advance, if the search committee wishes, provided this is done consistently for all interviewees.

After each interview is over, the search committee should take some time relatively soon for a debrief of the interview. Both search committee and prospective ministers may circle back with follow-up questions should the need arise (usually via email).

*Sample questions for search committees and ministers are in the Appendix.*

**Timing:** *The search committee should decide how it will conduct these interviews before extending any invitation to interview.*

**Key Dates:**

*Early January: Search committee decides questions for each interview before the first offer date*

*Mid-to-late January: Interviews are held before the first offer date*

*Before first pre-candidating weekend: Search committee decides questions for each pre-candidating weekend*

*February and March: Pre-candidating weekends are held*

## **Pre-candidating Weekends**

Pre-candidating weekends are the opportunity for the pre-candidates to meet with the search Committee. One person may organize the weekends, though often neutral pulpit arrangements and hospitality are covered by other members (and are covered in the next sections).

All search committee members should be present for each weekend (search committee members should save weekends in February and March for this). Usually, the prospective minister(s) arrives on Friday. Components of the weekend include a tour of the congregational building (at a time when no one is around), a social dinner gathering, a three-hour interview, a tour of the area, a neutral pulpit service, and a final lunch discussion/interview. Prospective ministers may meet with the current interim minister, other ministers on staff, and affiliated ministers, if requested. It is not recommended that other staff meet with pre-candidates as they are not bound by UUMA professional guidelines.

Spouses should be welcome for the pre-candidating weekend with costs covered by the search committee budget, though this is ultimately a decision between the minister and spouse. Children's expenses are not covered by the search committee budget, and, if possible, the minister's children should not come for pre-candidating weekends. Spouses are often part of the "sell" for a minister and often need to experience the area for both family and employment possibility reasons.

The search committee should first decide on how many pre-candidates to see. Most congregations decide on three pre-candidates, though four is not out of the question. Occasionally, a congregation wants to consider fewer pre-candidates, though that can be risky since ministers are looking at multiple congregations, too.

## **Inviting Pre-candidates**

When it's time for the search committee to extend invitations to potential pre-candidates, they should ask pre-candidates these two questions:

1. Which weekends in February and March could you be free?
2. Are there any congregations in our general area that we should avoid for a neutral pulpit for you?

These questions allow the search committee to find potential weekends without revealing the location of all neutral pulpit sites. It also allows the minister(s) the opportunity to avoid congregations that may be problematic, for whatever reason. No further questions about why a congregation should be avoided should be asked.

### **Sample Pre-Candidating Weekend Schedule**

- Minister arrives Friday
- Meeting with interim minister (optional) at a neutral site
- Tour of congregation (at a time when the building is vacant)
- Friday dinner: time to get to know one another
- Three-hour interview on Saturday morning at a private site, often someone's living room with their spouse and family gone
- Tour of area
- Free time on Saturday night
- Take prospective minister to pre-candidating neutral pulpit (depending on distance, this could be Saturday night or Sunday morning)
- Neutral pulpit service
- Final lunch and follow-up with search committee

Pre-candidate spouses are welcome at all events except the interview and meals in an interview-type setting.

There are more logistical concerns here, some tied in with neutral pulpits and hospitality, than one might expect. Scheduling the tour can be problematic if the building is in constant use. Some search committees have simply reserved the building for an hour to ensure privacy. And the overall schedule may be affected by where neutral pulpits are, especially if they are not close by. The tour of the area may be done by one or two search committee members. The coordinator of this should work closely with the hospitality person and neutral pulpit arranger to create a cohesive and productive weekend.

Often, other meals like Saturday lunch and dinner are also with the search committee. The spouse should be welcome at all events except the interview and final lunch (though a separate table is completely fine).

### **Virtual Pre-candidating**

The Transitions Office has gathered knowledge from search committees who conducted pre-candidating weekends virtually during 2020 and 2021. They were often spread out over a longer weekend (Thursday-Monday, for example). Each of the weekends should be as consistent with others as possible; for example, if a search committee hosts one pre-candidating weekend virtually, all of the weekends should be held virtually. This is to ensure fairness in the interview process and to ensure that each pre-candidate has access to the same amount of the search

committee's time, attention, and resources. Any virtual schedule should come from mutual agreement between the search team and the minister.

A tour of the church building can be done effectively via video. One search committee did a live tour in a video meeting and the precandidate was able to ask questions, while the rest of the search team provided information. In other cases, one person did a video which was shared with precandidates and then there was conversation. This year, in addition to the other two options, a search committee could do a virtual tour at any time and include it in their documents packet ahead of time.

Interviews—usually, these are Saturday mornings in person and last three hours. Search teams and ministers seemed to prefer spreading this out over a couple of days, which is definitely an option.

Meals—there's no reason a search team could not spend a meal or two with the candidate and their spouse/partner over lighter conversation before the neutral pulpit. The final meeting after the neutral pulpit should be with the precandidate only.

Neutral Pulpit—Congregations did this in one of two ways; either the minister preached just for the search committee or the minister was a guest at a neutral congregation elsewhere while the search committee viewed the sermon. We do not recommend watching the minister in their home congregation (if they are serving one currently). The home congregations will have different expectations of the minister, and if you were known to anyone in the congregation or they did a web search on you, they might figure out their minister was in search, which would break confidentiality.

Tours of the area—you might check your chamber of commerce, ask a local realtor (not in the congregation), or create your own virtual tour.

***Timing:*** *Pre-candidating weekends should be scheduled alongside neutral pulpit sites earlier in the process before other congregation schedules get full, and this often gets scheduled by the end of the summer or early fall. Finding a time for a tour of the congregational building and for interviews can happen later.*

**Key Dates:**

*Summer: Search committee finds weekends in February and March when all can be present*

*Fall: Congregational building tour time scheduled*

*January: Site for three-hour interviews set; offers and scheduling with potential pre-candidates made*

**Neutral Pulpits**

With each pre-candidating weekend comes the opportunity for a neutral pulpit visit at another congregation. The pre-candidate is simply a visiting minister to that congregation, and the search committee attends without announcing that they are part of a search committee. Often, the search committee shows up in pairs or as singles to the neutral pulpit congregation,

presenting themselves as visiting guests. They simply experience the service along with the hosting congregation.

Neutral pulpits are set up by the search committee. The ideal situation is to have three different congregations hosting the neutral pulpits that are of the same size and style as the searching congregation, within 90 minutes of the searching congregation's location. However, not all congregations have the ideal situation as an option. Acceptable variations include UU congregations of a different size within 90 minutes, congregations within three hours where the pre-candidate can be lodged nearby the night before, or another liberal congregation in the area that would welcome a UU minister.

Search committees should be discouraged from selecting the same congregation more than once to host a neutral pulpit, if possible. Search committees should also be strongly discouraged from selecting a congregation that is so close that other congregation members could easily show up. Search committees should avoid looking toward congregations involved in their own ministerial transition as host (even if they are a year away).

It is forbidden to use the minister's home congregation as a neutral site because it is not neutral. Search committee members should not visit the neighboring minister's congregation if it is known to the search committee that the minister is interested in being an applicant.

In cases of inclement weather or some other reason for a service cancellation, search committees have found private space outside of their own congregation to be the setting for a neutral pulpit, though this should be a last resort.

The search committee member arranging the neutral pulpits should communicate with each congregation's minister about hosting a neutral pulpit. This ensures the most confidentiality. The arranger should confirm the number of services (if more than one, the ministerial pre-candidate is expected to cover all services), start times, and etiquette. Usually, once the dates are set and ministers confirmed for the weekend, the pre-candidate is directed to the hosting minister to make final service arrangements. The arranger should also inquire about the order of service and ask which parts of the service are flexible, which are under the ministers' purview, and which elements are rigid in the service. This may lead to choosing a different site, if, for example, it's important for the search committee to see the minister(s) interact with children and the potential hosting congregation does not allow this as part of the Sunday service.

Once the weekends are confirmed with neutral sites, and once the pre-candidate has accepted a weekend, the pre-candidate works directly on the service elements with the hosting congregation as directed by the hosting minister. If, for some reason, the search committee needs to cancel a pre-candidating visit, they are obligated to fill the neutral pulpit. If the pre-candidate needs to cancel a pre-candidating visit, then the pre-candidate is obligated to fill the neutral pulpit.

The visiting minister is treated as guest minister at the neutral site, though no honorarium is expected.

The neutral pulpit arranger is also responsible for transporting the pre-candidate/guest minister to the hosting congregation in time to lead the service well, usually at least 30 minutes in advance of the service. We've had a pre-candidate taken to the wrong church by a search committee member!

The arranger should also be responsible for finding a restaurant close to the hosting neutral pulpit site for the final lunch conversation/interview with the search committee (the neutral site minister may have suggestions).

A special note about publicity: neutral site hosts are encouraged to not list the visiting ministers' name on the website, but to share visiting minister(s) information through a non-searchable e-mail blast and/or pulpit announcement. This aids in confidentiality.

A special note about co-ministry teams in search: the co-ministry team should be ready to address how they would like to share a Sunday service (or services if more than one at a neutral pulpit). If the search committee wants to make a specific request of the co-ministers, they should do so at the time the invitation to pre-candidate is extended.

Special request to pre-candidates, search committees, and hosting pulpit congregations: be timely. Be gracious, especially when the unexpected happens (it does somewhere every search cycle).

***Timing:*** *Setting up neutral sites should happen soon after the search committee has decided how many weekends to have, ideally summer to early fall (worship calendars can fill quickly). The remaining arrangements should be handled in a timely manner.*

**Key Dates:**

*Summer/Fall: Neutral pulpit visits arranged*

*Late January: Confirmation of sites with pre-candidates and contact information shared*

*Pre-candidating weekends: Transport ministers to neutral site at least 30 minutes early*

## **Hospitality**

The search committee is responsible for hosting pre-candidates and the candidate during the search process. Travel arrangements, housing, and transportation on-site are all issues to consider. Usually, one person acts as hospitality coordinator.

Spouses are welcome along with pre-candidates. Families are welcome for all or part of candidating week.

Pre-candidates may either book their own travel or let the search committee do this. Pre-candidates making their own arrangements should be frugal with what is ultimately the search committee's budget. Search committees making arrangements for pre-candidates should allow for a reasonable travel day. Either party should get the approval of the other before a final booking. If the pre-candidate is driving, [standard government reimbursement rates](#) for mileage apply.

Lodging for the visit should be arranged by the search committee, ideally in a reasonably priced hotel which is convenient for the weekend and in a location that allows the visitors to experience the city. The latter is especially true if the spouse/family comes. A pre-candidate or candidate should never be lodged in a member's free room, empty house, or even place of business.

The hospitality coordinator will be responsible for transporting the visitors. This includes airport pick-up (or reimbursement for taxi or rental car) and transporting the pre-candidate to the various meetings. Often, the search committee splits up transportation so that each committee member has one-to-one time or at least two-to-one time with the pre-candidate.

If the minister has expenses to be reimbursed, these should be repaid in a timely manner.

All of the above is also true for the ministerial candidate and their family, though a rental car for the week is a worthy expense, as often the minister and family are exploring places to live in their free time and learning about the community on their own.

***Timing:*** Lodging arrangements generally do not have to be prepaid, so lodging arrangements can be set up as soon as pre-candidating weeks are arranged. Other arrangements should be done as soon as the pre-candidate commits to a weekend visit.

**Key Dates:**

*Fall: Lodging arrangements secured once pre-candidating weekends are set*

*Mid-to-late January: Travel arrangements made as soon as pre-candidate accepts*

*A couple of weeks before the pre-candidating weekends: Search committee should finalize local transportation for the pre-candidate (and spouse)*

**References**

References and reference checking are an important part of the search process. The search committee usually has one person coordinating reference checks and several people working with that person. There are two to three phases of reference checks in the ministerial search process for search committees. References are the opportunity for confirmation of how ministers depict themselves and for the search committee to ask their own questions from their own perspectives. Ministers also do their own reference checks by talking with interim ministers, regional staff, and previous settled ministers. What both search committees and ministers are seeking is congruency. Is how the congregation or minister presents consistent with how others describe them? Without doing reference checks, you will never know.

**When to Do Reference Checks**

<i>Initial reference checks</i>	<i>Those provided by ministers</i>	<i>January, after getting applications</i>
<i>Developed reference checks</i>	<i>Done once pre-candidates have been confirmed</i>	<i>February-March</i>
<i>Candidate reference checks</i>	<i>Done once a candidate has accepted offer</i>	<i>Between acceptance of offer and candidating week</i>



## **Initial Reference Check**

The initial reference check can occur as soon after getting the ministerial records as the search committee would like. Some congregations want to do them immediately while others occur after the first interview and prior to pre-candidates being named. Once a search committee has received access to ministerial records, it may then ask the minister directly for an initial set of references of the minister's choosing. A list of sample questions for these references can be found in the forms section. These may be done over the phone, video, or via email. It is recommended for phone and video interviews that, if possible, two search committee members conduct the reference check. The reference checks at this juncture are often done as the search committee moves toward selecting pre-candidates, though they can be done earlier if the search committee needs additional information to decide on initial interviews. In general, to respect people's time, 30 minutes should be the maximum allotment for this conversation.

## **Developed Reference Check**

Once the search committee has selected its pre-candidates, a second round of reference checks is strongly suggested. These go beyond references the ministers recommend themselves, though it is essential to get the minister's consent to speak with developed references before contact.

The search committee could and should now ask to speak to:

(1) someone in the ministers' current congregation or congregation last served. If this is a ministerial internship, the search committee should speak to the supervising minister and/or someone on the internship committee. It is imperative to take great care to be mindful of the need for confidentiality. If a minister is currently serving a congregation, their search for a new ministry may not be public to the congregation. Yet every searching minister should be able to identify one trusted member of their current congregation who can both be a good reference and keep confidentiality.

(2) Additionally, the search committee may ask to speak to a UUA regional staff person (CUC, if Canadian) about what they know of the minister's ministry. Again, the search committee should ask the minister which staff person to contact before contacting a regional staff person. If the minister cannot connect the search committee with a regional staff person, the search committee may reach out to the Transitions Program Manager to ask if anyone on staff is familiar with the ministry of the pre-candidate.

(3) Another developed reference option is now based on the search committee's desire for deeper clarity about a pre-candidate. For example, the search committee may have some questions about the minister's involvement in staff supervision, anti-racism work, or healing trust work, to name a few. The pre-candidate could then be asked by the search committee, "For a developed reference, we'd like to talk to someone of your choosing who could tell us about your work around conflict. Whom could we contact about this?" The search committee is free to ask other questions of these developed references, too.

Current employees of a prospective minister's congregation should not be references. To avoid putting any employee in a complicated spot by even having to be asked about (let alone provide

a reference for) someone who has power over them, we encourage ministers to use former employees as references. For newer ministers, this might involve a previous career.

Again, these reference checks may be done via phone, video, or email. Timing should not exceed 30 minutes. While there is no limit on the total number of developed references allowed, most congregations do two to four checks.

Reference questions should be fairly consistent across the board. Search committees should remember that references often tell the prospective minister not only that they were contacted but also what they were asked and how the conversation went.

### **Candidate Reference Check**

Once a search committee has selected a candidate, they have the option to ask the candidate for additional references within the current congregation or workplace where the minister is serving. A search committee may feel the need to do its due diligence as it prepares for candidating week. These references should be approved by the candidate, though asking for people who will have differing opinions on the previous ministry is a reasonable request.

***Timing:*** January through early April

#### ***Key Dates:***

*January: Initial reference check*

*February-March: Developed reference check*

*April: Candidate reference check*

### **Candidating Week**

Candidating week is the opportunity for the congregation to meet the ministerial candidate. The congregation has put a lot of trust in the work of the search committee and is still looking to the search committee for leadership.

The Transitions Office is now sharing three possible models for candidating weeks. The primary model is less committee meeting and greeting-based and more about simply getting to know one another, building trust, and looking toward a new future. The second is the traditional, pre-pandemic model; the last is a virtual model. We trust search committees in partnership with the candidate to figure out what makes most sense for you both.

In all models, the search committee manages the week to make sure things run as smoothly as possible, setting up a reasonable schedule that allows for the congregation to interact with and vote on the candidate. Usually, one person from the search committee manages the planning and schedule for the week, and all search committee members take leadership roles during the week. While hospitality should have previously been arranged for lodging and transportation if the week is to happen in person, the point person for the candidating week manages the

schedule and coordinates with the search committee, candidate, congregational leadership, congregation, and area ministers.

During the candidating week, the candidate(s) leads services on both Sundays. At least one congregation-wide open session with the candidate should be scheduled. Meetings with staff (often as a group, then with individuals) are expected, as well as a meeting with the governing board. On that Friday, a short check-in is highly recommended between the candidate and search committee to talk about how things have gone during the week. Other meetings with affinity groups, task forces, and committees are recommended during the week, as is a meeting with area clergy.

The interim minister and candidate can meet during the week and should discuss ahead of time any looming pastoral emergencies or other pieces of information the candidate would need to know. During the week, the candidate is the go-to minister for the congregation should something arise.

There should be at least one day off during the week, as well as time off each day for restoration and home search. The schedule should be mutually approved by the search committee and the candidate.

The search committee should be a guide/host at congregational events. This is a place where the search committee can have other members of the congregation assisting significantly. Meetings with staff and area clergy are generally left to the candidate, though this has varied from congregation to congregation.

The search committee should also remember that members of the congregation are noticing the search committee and their enthusiasm at the same time they are meeting the candidate. Trust in the search committee is still a key factor at this stage.

### **Theme-Based Candidating Week Model**

The [primary model is theme-based](#), with each day having a theme. Meetings are limited to three a day, and we'd recommend none last longer than an hour and with breaks in between (whether in person or virtual). The forums are there to replace specific committees and to focus on thinking differently and less about "what we do." This may be particularly useful as we think about the post-pandemic congregation.

Specifically, Tuesday/Wednesday/Thursday could be invitational to all committees and task forces to reflect on how their work is tri-fold—for the individual spirit, congregational health, and the congregation's role in the wider community. This may be new for some committees, but it might be a good mutual exercise to expand thinking about the work of the congregation with a minister in new ways. It might also bring some communication and connection between groups in the congregation. We also encourage people who are mainly interested in the life of the congregation to participate in these forums, even if they aren't on a committee or task force.

The abiding questions for ministers and congregational members is a place to start conversations.

We also wanted to make sure the minister had a real day off.

## **Traditional Candidating Week Model**

This model has been around for three decades, at least. The pluses are that it's tried and true and gets engagement from the people who are often most active in the congregation. The minuses are that ministers and search committees often report it is exhausting and feels, at times, superficial.

### **Sample schedule:**

Saturday: Arrival of candidate and family, meal gathering with search committee, negotiating team, and governing board and spouses.

Sunday: Sunday service, congregational lunch, and question and answer time. Perhaps one other meeting with group within congregation.

Monday: Staff meeting during the day, individual staff meetings after all-staff, one evening meeting.

Tuesday: Meeting with area clergy, meeting with governing board, possibly one other meeting with committee/task force (often the finance committee).

Wednesday and Thursday: Meetings with various groups within the congregation, lunch with past presidents on one day, possibly a short open meet-and-greet during one of these days, if the search committee and candidate want a second open meeting.

Friday: Search committee check-in meeting, special time set aside in evening to meet with religious educators, parents, children, and youth.

Saturday: Day off.

Sunday: Candidate leads Sunday service. Minister and family are taken to lunch by a search committee member who votes early. Ballots are counted. Minister(s) notified about the results when a decision is made.

The above schedule should, of course, be adjusted by the search committee and candidate, as needed.

## **Virtual Candidating Week Model**

Every candidating week was virtual in 2020; all had successful calls. Most congregations spread these out over two weeks, though some did them in one week. Interfaith clergy or UU clusters were gathered virtually to meet the candidate. We tended to see fewer committee and small group meetings and a real craving for more informal social time. We learned that this informal time is more important than we realized-- the one-on-one interactions that often take just a moment or so can leave very important impressions on both the congregation and the candidate.

Some ideas to foster these moments were to open up Zoom meetings a few minutes early or stay open late for people to drop in and chat (which we see happen in congregational meetings in general), having unscheduled open conversation time, allowing for a certain number of short

phone calls—all might be possible. You may have other ideas; we'd love to hear them. If you're planning a virtual candidating week, please contact us to find about how you might adapt the current models.

We recognize that candidating week is exhausting, and it will be important to maintain a schedule that allows for down time for the minister. Ministers already serving congregations are reporting "Zoom Exhaustion"—which could be more dramatic during a candidating week. Pacing will be important. Creating a schedule that works for mutual benefit and health will be very important.

Over the past year, congregations learned how to have meetings online and even vote. The UUA created this [Technical Guidance on Virtual Voting](#) page as a resource for congregations with impending online congregational votes.

***Timing:*** *Most of this happens in the spring, other than setting the dates for candidating week.*

***Key Dates:***

*Late Summer: Search committee meets with interim minister to reserve candidating week (usually late April to early May)*

*March-April: Search committee organizes candidating week in conjunction with candidate*

*Candidating week: Search committee members act as hosts/guides during the week*

## **Process Observations**

Often, a search committee decides it would like to make sure the meetings go as well as possible. To this end, one person serves as a process observer for the committee. Some committees ask one person to do this, while others rotate the role between all members (preferred). Often, observations are made about whether what was proposed to be accomplished in the meeting was accomplished, whether all people had the opportunity to speak and feel heard, whether the decisions made were agreeable to all (can they live with the decisions and abide by them?), and whether the group stayed in covenant with each other. Former UUA Regional Lead Rev. Dr. Ian Evison wrote a [process observation guide](#) that may be a useful resource here.

Historically, meetings have become complicated when:

1. One person dominates the conversation.
2. People are cut off or feel unheard.
3. Disagreements are not seen as learning opportunities for all.
4. One person on the committee is the only person of an identity (age, gender identity, race/ethnicity/sexual orientation, for example) and the search committee either tries to ignore or downplay the identity or expects the person to represent everyone from their identity group. In other words, the one person becomes the problem as opposed to the committee as a whole having an identity-based issue to work through.

5. People passively hold back concerns.

***Timing:*** Ongoing

## **Negotiating Team**

The governing board appoints a negotiating team to prepare a draft of the ministry agreement into which the congregation and minister will eventually enter. The negotiating team may also be asked to recommend compensation (salary, housing, benefits) to the board, though ultimately the governing board is responsible for setting compensation.

Shortly after the search committee is selected, the board should appoint a negotiating team, consisting of no more than three persons, including at least one search committee member (selected by the search committee), one board member, and one other person (selected by the governing board).

The team's purpose is to develop for board approval a draft ministry agreement that reflects the relationship the congregation hopes to have with the minister it calls, and then to negotiate that agreement with the ministerial candidate.

The team should consult with the board to achieve a clear understanding of the compensation amount set by the board and the plan for negotiating a final agreement. The team will submit a draft of the breakouts for total compensation for the documents packet.

The draft agreement should be based on the recommended joint UUA/UUMA contract.

In addition to preparing a draft agreement, the negotiating team should fill out the contract change form listing all changes made from the UUA/UUMA recommended contract.

Both documents should be submitted to the Transitions Office by November 30<sup>th</sup> (the day before the congregational record is to be revealed to ministers).

The board, for its part, should be prepared to support any ministry agreement negotiated within its understanding with the negotiating team. The draft agreement should be included in the documents packet prepared by the search committee and discussed with each pre-candidate, with notes made on the response of each. It is not necessary at this point to resolve any differences, only to acknowledge that they exist and will need to be resolved if this person is chosen as the candidate.

Members of the negotiating team who are not on the search committee should not meet with the pre-candidates, though they should be apprised (without mentioning names) of significant differences and "deal-breakers" which should be addressed before the candidacy is offered.

Once the offer to a candidate has been accepted, the negotiating team and the candidate may meet to finalize the contract and compensation. Once an agreement is reached, the contract may be signed by fax, or be signed at the end of candidating week. The contract may include the phrase, "upon successful congregational call vote" if signed before the candidating week vote.

The search committee should not announce the candidate to the congregation until the contract and compensation have come to mutual agreement, the candidate clears the search committee to make the announcement (they may have to announce to their current congregation that they are leaving), and the initiation of a criminal background check.

**Timing:** Fall/Spring

**Key Dates:**

*Fall: Negotiating team convenes to examine contract and compensation and make recommendations on both to the governing board.*

*Offer Day 12:01 PM EDT until complete: Negotiating team may begin contract and compensation negotiations with candidate.*

## FAQs

We searched last year and are in search again this year. What steps do we need to repeat and what do we not need to repeat?

*You need not redo the survey. You might consider doing a couple of updated cottage meetings to determine where the congregation is now and reflect on how accurate the data from the survey still is. Most congregations do not repeat Beyond Categorical Thinking unless it has been more than two years since they did this or if there were extenuating circumstances that indicate that re-doing this is a good idea. The congregational record and documents packet should be updated, as needed, depending upon what has transpired in a year.*

Can we give welcome baskets to our pre-candidates?

*Reluctantly, yes, though a search committee should not feel obligated to do this and the Transitions Office discourages this. If anything, welcome brochures of local attractions and information about the area are the most appropriate offering. Regardless, search committees should be consistent if they offer anything. We had one congregation offer more to one favored pre-candidate than the other two, not knowing that the two of the pre-candidates were close friends.*

How can ministers do reference checks on congregations?

*Ministers in search are encouraged to reach out to the current interim minister, previous ministers who served the congregations, and, if named a pre-candidate, they should reach out to the regional staff who serve that congregation. Ministers should not reach out to members or staff of the congregation. Indeed, a good question for a search committee to ask a minister in an interview is to whom the minister has talked about their congregation (this is a way to gauge interest).*

What else should ministers do to prepare for search?

*Ministers should do an internet search of themselves. Know what's going to be found out about you to avoid surprises.*

*Talk to ministers who've been in search recently.*

*Figure out your finances and know what you can afford. Do your research about the congregations in search.*

Is there any service for ministers that will help them research housing opportunities near congregations in which they are interested?

*Yes. The Transitions Office recommends [this website for moving clergy](#) developed by colleague Maj-Britt Johnson. Another useful website is <https://www.bestplaces.net/>.*

Can we see another congregation's congregational record as an example?

*If you ask on your own directly to another congregation, you can. Also, a sample congregational record is included in the Appendix of this handbook.*

What's the most common mistake ministers make in their ministerial record as they prepare for search?

*They don't present themselves as ministers--they present as academics and consultants. Tell stories of how you do ministry.*

What's the most common mistake congregations make in their congregational record as they prepare for search?

*In an effort to make themselves more attractive, they only put their best foot forward, thinking of the congregational record as more of a resume than an authentic presentation of the ministry that's needed by the congregation. It's far better to say, "As a congregation, we have different opinions on growth. Some people are adamant about wanting the congregation to be their sanctuary from the world while others see that our future is outside of our doors," than to say, "We want to grow." "The congregation is still conflicted about Rev. John Doe's ministry," is better to say than to say nothing at all. Conversely, a congregation can be too negative about itself and cause ministers to miss what the congregation has to offer. Balance and authenticity are your allies in search.*



## Calendar

Search committee retreat with UUA volunteer retreat leader	Summer at end of first year of interim ministry
Beyond Categorical Thinking application	June-September
Beyond Categorical Thinking workshop	August-December
Congregational survey	July-early October
Negotiating team selected	August-September
Cottage meetings/focus groups	August-early November
Negotiating team recommends contract and compensation to board (informed by review of the Employer's Participation Agreement on file with the UU Retirement Plan)	October-November
Congregational record	finished by mid-November
Proposed contract and contract change form	Due to Transitions Office by Nov 30
Compensation worksheet	Due to Transitions Office by Nov 30
Congregational record released	if approved, December 1
Documents packet	finished by mid-December

## Forms and Links

[Congregational Covenant](#)

[Ministerial Covenant](#)

[Congregational Survey](#)

[Beyond Categorical Thinking Program Information](#)

[BCT Request Form \(Word\)](#)

[Blank Congregational Record](#)

[Blank Ministerial Record](#)

[Visual Guide: Steps to Completing the Congregational Record](#)

[Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox](#)

[Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries \(Word\)](#)

[Contract Change Form](#)

[Compensation Worksheet](#)

[Sample Interview Questions for Search Committees and Ministers \(xls\)](#)

[Government Reimbursement Rates for Mileage](#)

[Clergy Moving Resource from Maj-Britt Johnson](#)

[Congregational Online Voting Resource](#)

[Theme-Based Candidating Week Model](#)

[A Guide to Process Observation \(from UU Regional Lead Rev. Dr. Ian Evison\)](#)

[Geo Index Listing 2021-2022](#)

[Report after Second Visit \(Coaches\)](#)

## **MinistrySearch System**

Once the search committee members have been entered in the MinistrySearch system after June 15th, each person should tour the system to gain familiarity with the dashboard and the congregational record questions. Some responses will be automatically filled from data provided yearly to the UUA for General Assembly and membership certification.

Some responses are also carried over from interim search questions and are there for informational purposes; the search committee is free to alter the responses to these questions.

Initially reviewing the questions can help the search committee frame the information needed for presentation to potential ministerial applicants. Reviewing the questions as a group may also help the search committee form questions and discussion items for the survey and cottage meetings.

While the search committee may begin filling out the congregational record as soon as it wishes, most wait until after the completion of the survey and cottage meetings to give more informed responses.

Multiple search committee members can view the congregational record simultaneously, but we caution folks against editing simultaneously as you run the risk of saving over each other's edits. More information about this can be found in the [Visual Guide: Steps to Completing the Congregational Record](#).

The entire record should be complete by mid-November.

## Other Related Information

### Discussion: How much can we afford?

Congregations struggle with budgeting, fair compensation, and trying to make an attractive offer which is financially sound. Our UUA currently uses a geo index scale to show the fair compensation ranges for congregations of different sizes in areas with different costs of living. From this geo index scale, congregations can determine a range for salary and housing (housing is taxed differently for ministers). Check on your congregation's [geo index scale](#). What is the range recommended for your congregation? Are you currently compensating fairly? If you are below the minimum, the search for ministry gets more complicated. If you stretch to meet UUA compensation standards, or stretch to be at mid-point, is this sustainable beyond a year? How much responsibility will you put on the minister to "sing for their supper?" And do you put other staff off by not adequately paying everyone?

And then there are all the benefits! As a search committee, do you know which benefits you should give and what you currently offer? Benefits often cost approximately 40% of the salary and housing amount. Ministers have saved congregations money by not taking benefits (the settled minister can get on their spouse's medical plan, for example). All too many congregations have found this solution to be a budget relief temporarily, only to be surprised when the minister leaves and the congregation has to find the money for health insurance for future ministers. It's a short-term fix that becomes an immediate problem during the next search; this should not be the future minister's problem.

What are the financial issues with which you need to wrestle as a congregation to support ministry? What can you reasonably afford? Check in with a [UUA Compensation Consultant](#) for help in thinking through these issues.

### Discussion: Theology on Survey

Is it more important to know what an individual's theology is on the survey or to have people reflect on what it means to be a multi-theological congregation? It used to be that one of the gifts of the survey was that the congregation learned it was more diverse theologically than it thought. Does the minister(s) need to state their theology or does the congregation know that whoever becomes the candidate will need to minister to people with a range of theologies?

### Case Study: Beyond Categorical Thinking

Why would a congregation need to do this workshop if it has earned the Welcoming Congregation designation, has celebrated Pride every year for nearly two decades, has a Black Lives Matter banner, has held educational programs on race and racism, has an accessible meeting space, and has members from historically marginalized groups (People of Color, LGBTQ+, people with disabilities, etc.)?

## Discussion: Consensus versus Majority

Search committees often find the question of how to make decisions challenging. Simple majority or consensus? On the one hand, majority voting is quicker, though it can leave people divided. On the other, consensus takes longer and can be confusing. Does everyone have to have the same opinion or does everyone agree to support the decision if even if it isn't their preferred option?

In the beginning, some decisions are easier. Yet let's take a look at how this can get complicated:

The search committee is trying to decide on how to prioritize their ministerial options. They decided to go with a letter grade system for their final three pre-candidates.

	<i>S.C. member</i>	<i>S.C. member</i>	<i>S.C. member</i>	<i>S.C. member</i>	<i>S.C. member</i>	<i>S.C. member</i>	<i>S.C. member</i>
<i>Precandidate AZ</i>	A	A-	C-	B+	A	A-	A-
<i>Precandidate BY</i>	B+	B+	A-	B+	B	B+	B
<i>Precandidate CX</i>	A	A+	A+	B-	B-	B-	A+

How would you recommend the above search committee rank order its pre-candidates?

And how can your search committee get to a place where everyone agrees to support all decisions, even ones that are not their preferred choice?

## Discussion: When there's only one person...

A dynamic on the search committee can happen when there is one person on the committee who holds an identity different from the rest of the committee. In the past when this has happened, there have been complaints of "They don't listen to me because I'm so much younger," and, "My opinion seems to matter less, and I'm experiencing micro-aggressions around race." What can a search committee do to make sure that people, their identities, and thoughts aren't marginalized and that all people and opinions are valued?

# **Phase Four: Opening Up for the Search**

## **Background Information to Improve the Odds of Better Decision Making**

In theory, the hard work is done. In reality, the preparation is done, and now comes the piece of mutual discernment.

It is very easy for both search committees and ministers to forget this is a mutual discernment process and that both are on timelines. One of the more common errors, at this point, is for the minister or search committee to assume that the congregation or minister is looking for only them.

This has to be held in balance with another common error of rushing through the process and assuming that the first interest is their best interest and discounting other options. Some congregations are more fearful of getting no minister than finding a minister who can serve them well. Some ministers do the same. One pre-candidate reported one year that a search committee was so enamored with the first pre-candidate it had seen the week before, that the search committee spent more time talking about the other pre-candidate than they did to them during this pre-candidating weekend.

Opening up for the search means all of that hard work is about to be put on display. All feel excited, vulnerable, and hopeful. It's a key moment for the Transitions Program Manager to work with search committees and for ministers' colleagues to be present to ministers. It is important to acknowledge this moment, appreciate all the hard work that has been done so far, and shift from preparation to mutual discernment.

In some ways, this is the last moment before time really crunches (even when it feels like it doesn't) for all involved. Deadlines become a part of the process in a very significant way now and they exist to promote fairness for all.

## **Key Elements**

### **Review of Congregational Record**

Once the congregational record is finished, the search committee should solicit feedback on the record from the interim and/or regional staff. The interim and regional staff are likely to be asked about your congregation's ministry needs by ministers during the search process, and they are aware of the congregation's history and patterns in a unique way. They can be of great help to the search committee in reflecting on the framing of the congregation's unique strengths and challenges in the congregational record. They may ask questions or suggest clarifications, but do not have the ability to delay the release of the record.

Once the interim and/or regional staff have provided feedback on the congregational record, the committee should let the Transitions Program Manager know the record is ready for review by clicking "Complete," and "Submit for approval." Ideally, the Transitions Program Manager has at least a week to read the record and ask clarifying questions or suggest changes. Once the

record is edited, if needed, and approved, records are made visible to searching ministers on December 1<sup>st</sup>.

The congregational record may be shared with the congregation if the search committee so chooses. Be sure to promote the understanding that the record was informed by broad congregational input and is not open for individual editorial input.

Changes to the congregational record may not be made after publication without the approval of the Transitions Office.

## **Review of Ministerial Record**

While there is no official approval process for ministerial records, searching ministers would do well to have several trusted colleagues review their record before release for edit, suggestions, and questions.

While searching ministers may indicate interest in the MinistrySearch system for a congregation while their ministerial record is still incomplete, ministerial records should be finalized in the system and ready to be made public by January 1<sup>st</sup>, the day before release. The Transitions Office will not release names to congregations if ministerial records are not finalized—the reason for this is that congregations will be able to see the name but not read the record. Please email [transitions@uua.org](mailto:transitions@uua.org) with any questions about finalizing the ministerial record.

The timing of the congregational record release and the release of interested ministers' names to congregations gives ministers one month to review records and research congregations. Research may include talking with the interim minister and previous ministers to the congregation. Searching ministers are strongly encouraged to read all congregational records, even those they have no interest in serving. Other congregational records can give insight into information that is or is not present in the records of the congregations in which the minister is interested.

[Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)

## **Review of Documents Packet and Scheduling of Discernment Phase Consultation**

By mid-December, the documents packet should be complete and submitted to the Transitions Program Manager for review to make sure all materials are included. When the documents packet is complete, the search committee and she schedule a consultation to discuss how to receive and review ministerial records of interested ministers. Once the meeting is scheduled (between mid-December and the first week of January), names may be released to the search committee.

## **The Release of Names**

Ministers read congregational records and apply for opportunities in December. The name and ministerial records of interested ministers are released to search committees no earlier than January 2<sup>nd</sup>.

## **The Initial List and Screening**

Once the search committee gets their initial list, it should acknowledge receiving each record via email, send the documents packet to the prospective ministers, ask for a link to the ministers' websites, if needed, and give the ministers a sense of their timeline and decision-making process.

Ministers should acknowledge receipt of the email and include a link to their website if it's not in their ministerial record.

## **Reviewing Ministerial Applicants**

Search committees are encouraged to review the ministerial records and ministers' websites before making decisions and/or requesting meetings. The search committee might wish to remind itself of what it learned from the survey and cottage meetings before reviewing applicants' records and websites.

One variable that cannot be controlled is the amount of interest. Congregations with more interest may need to develop a strategy of how to be as thorough and as fair as possible, given the amount of materials received.

## **Additional Ministers**

The Transitions Office will continue to release names of interested ministers for two weeks until January 16<sup>th</sup>. If a congregation is interested in continuing to receive names after January 16<sup>th</sup>, the search committee should email the Transitions Office with that request. Ministers wishing to apply to a congregation after January 16<sup>th</sup> should confirm via email with the Transitions Office that the search committee is still accepting names.

## **Limits for Ministers**

Ministers may express their interest in up to 15 congregations at a time. Once a minister has removed themselves or been removed from consideration for a congregation, they can, if they choose, select another congregation and express interest.

## Informing the Congregation

The congregation can know of your process, that your record is live, that you've received names, and that you're hard at work. They should not be told anything about the candidates or their names. For example, "Only folks who are new to ministry have applied" is not something to be shared. But giving the congregation a general calendar (much like you give to ministers who've applied) is strongly encouraged. It is important to remind the congregation that this is a time of high confidentiality, though you will be as open about process and timeline as you can be.

## FAQs

Why aren't names of interested ministers released to us once our record is live?

*Ministers like to know they are on equal terms in the process. Some new ministers may not be cleared to search until early to mid-December. Additionally, we encourage all ministers in search to read all congregational records. Some ministers know which congregations they will apply to, others need to do more research. The Transitions Office would rather reward thoroughness than speed in the minister's deliberation. This also allows congregations running a little behind schedule, for whatever reason, adequate time be reviewed.*

Can a search committee adjust their congregational record after it has been made public?

*With permission from the Transitions Office, yes. The search committee should e-mail Transitions Office for prior approval, stating the nature of what they wish to change.*

What information should we include in our email to interested ministers? How precise should we be with our timeline?

*Acknowledge receipt and express thanks for the interest. Ask for their website and initial references if it's not already provided in the ministerial record. Send them your documents packet. Let them know when you're meeting, when you hope to do video interviews, when you hope to select pre-candidates. It need not be date specific but could be something like, "We are hoping to invite people to video interviews by mid-January and then select pre-candidates the last week of January or the first week of February." Then, if need be, let them know of adjustments.*

Are there ministers who are ineligible to apply?

*Yes. Ministers removed from fellowship, on a hold from search, on settlement restriction from the Transitions Office, and ministers who are not UU are held out of the search process. Additionally, if a minister served the congregation in some way and then left, that minister is not eligible to apply until they have been away for three full years.*



Why should we not share more general information about the candidates?

*We are a relatively small denomination. Even little bits of information (like “all of our applicants are new to ministry”) could be a tip-off to a member about who might have applied. Additionally, such information might ping the biases of members who had preconceived notions of who would apply, cause anxiety, or encourage attempts to influence deliberations.*

Why can't a minister apply to as many congregations as they wish?

*A minister who puts their name out everywhere will give false hope to some congregations of real interest. Also, the minister should begin discernment earlier rather than later.*

Are there other limits further into the selection process?

*Yes, a minister may not accept more than three pre-candidating weekends.*

How soon should we contact the ministers after we get their names?

*Ideally, as soon as you get them, telling them your timeline for decision-making and interviews, and thanking them for applying. If a search committee or minister decides not to continue with one another, then please let the other know as soon as possible. For search committees, you can send a message through the MinistrySearch system (click “Dismiss,” then create an email on the subsequent page). Ministers may simply send an email to the search committee, thanking them for their consideration and letting them know they are withdrawing from consideration.*

## Calendar

Review of congregational record by interim minister and/or regional staff and Transitions Program Manager	Late November
Congregational records made public	December 1 and after
Review of documents packet	Mid-to-late December
Transitions Program Manager consults with search committee on the discernment phase	Late December-early January
Names of ministers released to search committees	January 2 <sup>nd</sup>
Search committee acknowledgement email	Early January
Last day names released to search committees without permission to extend	January 16 <sup>th</sup>

## Forms and Links

[Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)

## MinistrySearch System

Once the record has been approved by the Transitions Program Manager, the search committee will receive notification that the record will go live on December 1<sup>st</sup>.

Should the search committee wish to make changes after December 1<sup>st</sup>, they should get the approval of the Transitions Office before making changes to the live congregational record.

## Other Related Information

### Discussion

What does all the work from our preparation tell us about what we want in our next minister? And how does that compare to what we had in previous ministries? What unspoken pluses from previous ministries are likely to have gone unsaid in the information provided by the congregation? And if the congregation says it wants more of something from the next minister, what would we give up in order to get that in our next minister (unless you're paying significantly more than before)? Is it reasonable to have higher expectations without higher compensation?

## **Discussion**

Do you have preconceived notions about what you are looking for before you begin reading all the information? What are the patterns that stand out as you begin reviewing records and websites (or in the case of ministers—documents packets)? What themes re-emerge from what you read or what you presented, not only with one congregation or minister but across all the information you read?

## **Phase Five: Discernment and Mutual Selection**

### **Background Information to Improve the Odds of Better Decision Making**

A new kind of anxiety or urgency may strike at this point in the process, usually a combination of excitement and concern. This is the moment when there is a greater need to take a breath, be reflective, notice what your anxieties are, and ask what these anxieties might help you to see more clearly and what they might keep you from seeing.

Often, the anxiety comes in the form of reactivity to something from the past.

Our Transitions Director has watched search committees base their entire ministerial search on one unspoken question: Who's not going to fire the music director? Who's not going to ruffle our most vocal people in the congregation? Who's the most charismatic speaker? Ministers have done the same, though with different questions.

There's also the great anxiety of not finding a minister or congregation. This, too, can lead to poor choices.

There are no guarantees, and there shouldn't be, about the search process. This does not negate the hard work a search committee did (that hopefully the congregation recognizes) or the deep preparation a minister did.

Every search year is different, with a different pool of both congregations and ministers in the process, and that seems to affect the search process as much as how much hard work a congregation or minister has done. Sometimes a congregation or minister simply needed an extra year to be ready but did not know it.

The Transitions Director has watched both ministers and congregations be too picky or not picky enough. He's witnessed what he thought were horrible choices, and they've turned out well. He's assured himself that a particular mutual selection is what both the congregation and minister needed next, and the ministry lasted only three years. He's seen needles being found in the proverbial haystack and the metaphorical horse at the water station refusing to drink.

On the other hand, more often than not, hard work pays off. Ministers who've done their homework know what they have to offer and that their limits do well in the process.

Congregations that are aware of their gifts and challenges, have noticed historical patterns in the congregation's life, and are able to see and present ministry as a shared venture are more likely to fare well in the process.

At this moment, search committees should practice kindness and gratitude with each other and with prospective ministers. Ministers and search committees would do well to remember that not only is the minister looking for a ministry, they are expected to do ministry while they are searching with those who will select them. This is both fair and an extra burden. Prospective ministers should remind themselves that one way a search committee could select a minister is by seeing how the minister does ministry with the search committee.

What is not a fair request is, "How can you fix us so we don't have to do this ourselves?" or, as likely, "How can you be exactly as we want and idealize you to be without us having to do anything at all?" Ministers who enter into the search process expecting a perfect congregation

that is going to love and appreciate everything they do and follow every suggestion the minister makes (because the minister does know better, after all!) won't last long in the ministry either.

So, as you move through this mutual discernment process, be kind to yourselves, be present to yourselves, and be real about good possibilities for ministry.

## Key Elements

### Initial List and Screening

When ministerial records are released, each search committee member is encouraged to read all ministerial records and look at all websites of the applicants. Doing initial reference checks may also provide helpful insights in the screening process. Know that a few more applicants may come in over the next two weeks, but most names generally come on the first day. The new MinistrySearch system is designed to send emails when new applicants express interest.

#### [Visual Guide: Release of Ministers' Names](#)

While every search committee may devise its own screening process, the Transitions Office recommends each committee member simply make a yes, no, maybe list of all the applicants, answering this simple question, "Could this person be our congregation's minister?" The Transitions Office recommends two parallel screening questions (in no particular order):

1. Who has the ministry skills for what we need now?
2. Who presents as a good minister?

When the search committee gathers, it should determine from everyone's lists where is there mutual agreement and where is there a variety of opinion.

The Transitions Office highly recommends that the variety of opinion is a great opportunity for the search committee. If five people rate some highly, and two people are less enthusiastic, finding out more about people's thinking should be informative for the whole committee. Asking, "What lens did someone have that others didn't?" may lead to a rich conversation and greater group clarity. It may also represent the diversity of the congregation, something all members should keep in mind and not cast aside.

In general, the Transitions Office recommends that this list comparison happen at some point within a week of the initial release of names.

Ministers, too, would do well to answer the questions:

1. Do they need my gifts and skills now?
2. In what ways could I do good ministry with them (where do they hurt and where do they hope and find joy?)

## **Confidentiality**

A reminder: take great care with any information you have and hold it in confidence. Avoid leaving papers around, computer files open, and sharing, even anonymously, tidbits of information about applicants.

## **Protocols**

Once the search committee has met and has begun its discernment process, they should notify ministers whom they know they will not continue to consider of their decisions. They can do that in the MinistrySearch system. They have the option in the system (using the “Dismiss” button) to send a standard note thanking the minister(s) for their interest, saying the committee is not continuing with them, and wishing them well in their search, or committee members can write their own message within the system. Note: when sending messages outside of the search system, the minister will end up getting two emails.

Sending the email allows the minister to pursue other interests without thinking they are still being considered.

The same is true for a minister who has decided to withdraw from a congregation; please let that search committee know sooner rather than later.

## **Video/Phone Interviews**

Most congregations try to schedule video or conference call interviews with applicants as they move toward pre-candidates. Usually, these interviews take about an hour with time for questions from both search committee and minister. All search committee members should make every effort to be present, though in an emergency, and with the minister’s prior consent, video calls may be recorded. Questions should be consistent for each minister, though answers may prompt differing follow-up questions. Generally, these interviews happen in mid-to-late January.

## **References**

Some search committees immediately ask for references, which is recommended. Some search committees ask prospective ministers for initial references when they invite them for a video interview. The search committee may continue with developed references when they have agreed upon pre-candidates. A candidate reference check is an option once the candidate is named.

Searching ministers are encouraged to reach out to the current interim minister, previous settled ministers, and ministers on staff at any time. Searching ministers may speak to regional staff about a congregation once named a pre-candidate to that congregation.

*See the longer section in Phase Three on References for more detailed information.*

## **Pre-Candidate Selection**

Initial pre-candidating invitations may be extended as early as January 23rd (and not before), which is three weeks after name release. They can also be extended after the 23rd, if a search committee simply needs more time. Search committees would do well to let all applicants know a prospective timeline if they are going to extend invitations after the 23rd. Applicants may respond at any time on the 24th.

Most search committees allot three slots for pre-candidating weekends. Search committees are encouraged after the interviews to return to the question of “Could this applicant (or co-applicant) be our minister?” From that group, the search committee should then decide whom to ask and in what order.

Searching ministers are limited to three pre-candidating weekends. This can get complicated, so it is imperative for searching congregations to move toward selection by the third or fourth weekend of January.

The Transitions Office recommends giving the minister a three-day window to respond to the request to pre-candidate. This allows a searching minister to at least check back in with other congregations they may be waiting to hear from to get their timing. At the end of three days, the minister should either have responded to the message or the search committee can decide to move on. Once ministers have agreed to be a candidate, they should not back out to go to another more desired congregation.

Once the search committee has confirmed its pre-candidates, please send the other ministers an email through the settlement system to let them know you are moving forward with other ministers. This is also true for ministers.

### **Ministers may not accept more than three pre-candidating visits in the settled ministry search process.**

Once the committee has its pre-candidates confirmed and neutral pulpit sites assigned, please let the Transitions Office know the names and dates for pre-candidate weekends. This notification serves as a request for an interpretive file summary on each pre-candidate.

## **Interpretive File Summaries**

Once the search committee has selected all of its pre-candidates, they may request an interpretive file summary for each pre-candidate from the Transitions Office. An interpretive file summary is merely a compilation of the various evaluations a pre-candidate has received from other ministries and ministerial assessments. The file summary is a short compilation (usually a half-page to a page) of these assessments, and often includes information from congregations served, internship sites, the career assessment, and the Ministerial Fellowship Committee. It will also confirm the standing of the minister with the UUA.

Requests must be submitted at least 10 days before the weekend visit and will be sent first to the minister for their review. The minister is free to ask questions about sources for the file summary. The week of the visit, the summaries are sent to the search committee.

Once with the search committee, the file summary is only for them and not for public consumption—even if the pre-candidate becomes the candidate.

Often, the file summary tells the search committee what it already knows about the pre-candidate, which is one of the goals—that the minister has been forthcoming about their ministries to the search committee.

## **Pre-Candidating Weekends**

Pre-candidating weekends occur over the first eight full weekends in February and March (though a March Easter weekend may add a week to that calendar).

These weekends include a three-hour interview, a tour of the congregational facilities, a tour of the area, a neutral pulpit service, and a final lunch interview after the neutral pulpit service. The Transitions Office recommends that other social meal gatherings be provided as well. Pre-candidate spouses should be welcome this weekend at the expense of the search committee and are welcome at all the events of the weekend except for the interviews. Expenses are the responsibility of the search committee, which may either pre-pay or reimburse expenses.

## **Ministerial Agreements (Contracts)/Deal-breakers**

During the pre-candidating weekend, the search committee and pre-candidate should spend some time talking about the proposed contract and compensation. This is the time for the pre-candidates to bring forth any “deal-breakers” which can then be taken to the negotiating team, if need be. These questions may be raised earlier in the process by either search committees or ministers, but there should be no surprises either way when the offer is eventually extended.

*A recommended set of questions is available in the Appendix of this document.*

## **Discernment**

Once the pre-candidate weekends are complete, both search committees and ministers should enter into a final discernment of their options. The Transitions Office recommends both create a list of yeses, maybes and nos. At this point, both should rank order their yeses in the order of whom to ask/accept first.

Should a pre-candidating weekend happen on the very last weekend of potential pre-candidating options, the search committees and ministers involved would do well to have made a decision on the other options and then discern after the last weekend where the last visit falls on the list.

Both search committees and ministers should prepare lists to send to the Transitions Office.



## List to Transitions Office

Search committees must not communicate with any minister their intention to name the minister as candidate in advance of the offer day. Ministers must not communicate their intention to accept an offer from a congregation in advance of the offer day.

Instead, by Monday (midnight local time) after the last pre-candidating weekend of the search cycle, the Transitions Office would like from **every** search committee and **every** minister a list of your choices. The list should be divided into three columns—Yes (ranked), Maybe, No.

Search Committees should decide which ministers you would welcome to serve you, whom you would still consider, and whom you would definitely not select. For ministers, same columns, but list the yes/maybe/no for congregations. List the yeses in order of preference.

For Search Committees—something like this...

<b>YES</b>	<b>MAYBE</b>	<b>NO</b>
<i>Vivian—first choice minister</i>	<i>Louise</i>	<i>Terry</i>
<i>Harold—near tie</i>		

For ministers—something like this...

<b>YES</b>	<b>MAYBE</b>	<b>NO</b>
<i>Sydney—first choice congregation</i>	<i>Tokyo</i>	<i>Paris</i>
<i>Lagos—close behind</i>		

The Transitions Office asks for search committees' and ministers' lists to gauge how things are going to play out and to try and make the overall process smoother for all. The intent is to use this information to be able to say to search committee or minister:

- 1) You will be very happy on Thursday, when you reach out or hear from your first option

OR

- 2) It looks like your first option is thinking elsewhere, but your next option is available. Are you still good with this option?

Once you hear from the Transitions Director, you are free to confirm with your first choice option that they are going elsewhere.

OR

- 3) None of your yeses are going to work out. Let's talk about who's on your maybe list and give you a day or so to ruminate about this

OR

- 4) Nothing is going to work out; let's talk with the Transitions Office about the second offer date.

The Transitions Office will not meddle in this process. If first options match up, excellent -- even if it creates more open pulpits. While the Transitions Office wants all congregations and ministers to be selected, it is far more important that fairness, good timing, and honest process are at work in this final discernment moment.

The Transitions Office covenants with search committees and ministers to fairness, good timing, and honesty as these lists dictate next steps.

If search committees or ministers finish pre-candidating weekends early in the pre-candidating window, these lists can be sent as soon as you are clear. Ministers and search committees are free to continue contact with each other during this time, especially with follow-up questions that remain after pre-candidating, under the caveat you may not offer or accept a position before the actual offer day.

## Offer Date

**No official offer may be made before noon EDT on the first Thursday after the 8<sup>th</sup> weekend of pre-candidating weekends.** Once the time has arrived, search committees are free to reach out to all pre-candidates to either extend the offer, confirm they are going elsewhere, and/or wish them well.

## FAQs

We (I) can't decide between two options. What should I/we do?

*Congregations are encouraged to look at the results of the surveys/cottage meetings, etc., that gave them direction about what is needed in the next ministry. If a tie still seems unbreakable, talk with the Transitions Director or Transitions Program Manager, who may offer suggestions or clarifying questions. Ministers unable to decide should consult with family, colleagues, and the Transitions Director as well.*

How did the process evolve into what it is now? It seems very rigid and controlled.

*That's actually true, and it came out of desires to make the process as fair as possible to everyone. At one time, there was no offer date. Search committees could simply make an offer, and that often happened after the first pre-candidating weekend. Other search committees and ministers cried foul. In an effort to even the playing field, an offer date was created.*

*That evolution continued when at noon Eastern time on the offer day, ministers figured out how to avoid phone calls from their second options in order to hear from their first option. Additionally, some ministers didn't return phone calls as they waited to hear from first options who never let that minister know they weren't being offered the position. Some positions weren't filled and nothing was known about how things would go for two full days after the Thursday noon deadline.*

*A system of tipping off first options evolved and came to an unfortunate head when a congregation learned their first choice was going elsewhere. They came back to that minister at 11:50 am on Thursday and said, "Would you change your mind if we offered you \$5,000 more?" The minister did, and at the time this wasn't against the rules. However, it did leave an imprint on the other congregation who thought it had its first choice. Metaphorical dominoes fell as a result of that one change of mind, and multiple congregations who thought the search was going to work out one way discovered this was no longer the case. The resentment was understandably significant.*

*As a result, the Transitions Office asked for a finalized list by that Monday prior to the offer day. To date, that has worked better for all, though it's still a very hard day to find out you do not have an offer to extend or accept. The fairer process does improve the odds that deals are not already made.*

*The process will always evolve toward greater fairness. That is the ultimate reason for these changes.*

We don't have a match and we're devastated. What do we do?

*It's much better to talk about this sooner rather than later. Some search committees would do well to have a pastoral conversation with the interim minister, the Transitions Program Manager, or the Transitions Office. It's important to be proactive in responding to the situation at hand. A new perspective is often helpful--so is support.*

## Calendar

Names of interested ministers released to search committees	January 2
Last realistic date to expect names (search committees may extend)	January 16
Video interviews (suggested time frame)	January 2-15
Initial reference checks and website reviews	Mid-late January
Pre-candidating offers made	January 23 <sup>rd</sup> and beyond
Pre-candidating offers accepted	January 24 <sup>th</sup> and beyond
Interpretive File Summary Request	10 days before 1 <sup>st</sup> visit
Pre-candidating weekends	1 <sup>st</sup> full weekend in February and next seven weekends
Developed references (including UUA staff)	February 1-March 24
Decision List to Transitions Office	1 <sup>st</sup> Monday after 8 <sup>th</sup> pre-candidating weekend
Offer Date	1 <sup>st</sup> Thursday after 8 <sup>th</sup> pre-candidating weekend, 12:00 PM Eastern

## Forms and Links

[Visual Guide: Release of Ministers' Names](#)

## **MinistrySearch System**

On January 2<sup>nd</sup>, prospective ministers' names are released to search committees. The search committee can log in and view the ministerial records of those who have applied.

The MinistrySearch system has the capacity to send polite “no thank you” emails to ministerial applicants as the Search Committee narrows its lists. The same is true for ministers who decide to withdraw their interest from a congregational search.

## **Other Related Information**

### **Discussion**

Malcolm Gladwell, among others, suggests we make decisions in a very short time, often based on our assessment of a person's appearance (Gladwell's talked about Warren G. Harding appearing “more presidential”).

What makes someone appear more “ministerial” to you? What makes a congregation instantly more appealing?

### **Discussion**

When is it better to present no candidate than any candidate? What are our standards for bringing a minister to the congregation for candidating?

## **Phase Six: Finalizing the Offer**

### **Background Information to Improve the Odds of Better Decision Making**

At this point, an offer has been made and accepted. The focus turns now toward the wider congregation and more congregational involvement. There are several key pieces that need significant attention. Often, it's a time of relief and occasional impatience on the part of the search committee and candidate. Still, it can also be a bit of a treacherous time, especially if elements take longer or prove problematic in some way. The impact of contract negotiations can impact the subsequent ministry. Ministers serving a congregation will need to move quickly to make sure their current congregation hears from them that they are leaving. Attending to these elements impacts a lot of people. Care and good will are needed for all.

### **Key Elements**

#### **Contract Negotiations**

As soon as the offer has been accepted on that Thursday (noon EDT), the candidate may be turned over to the negotiating team. In theory, major deal-breakers have been discussed and resolved. The negotiating team and candidate should discuss any places needing negotiation, hearing each other well, and moving forward toward a common resolution of the contract and compensation. Relocation costs should be discussed (as of 2018 this is now taxable income, and congregations are advised to account for the extra tax in their offer) as well as all pieces of compensation. Other elements of the contract should be discussed and resolved. This can take anywhere from minutes to a couple of weeks, often depending as much on schedule as anything.

Regardless of the time, the contract and compensation should be agreed upon prior to candidating week, and either the contract is signed and exchanged via fax, or mutually agreed upon and signed upon a successful call.

The Office of Church Staff Finance can be a valuable resource for specific questions, as this is often an educational moment for ministers and congregations.

Major changes to the contract at this time that have not been discussed constitute a breach of trust and will affect the ministry. Minor changes, if contentious, can have the same effect.

Please refer back to the proposed contract, the suggested changes, and the standard UUA/UUMA contract.

#### **Criminal Background Check**

All congregations should do a criminal background check on their candidates, if for no other reason than consistency and the ability to honestly report they have done their due diligence.

These can take anywhere from one to four weeks.

Congregations need only do the criminal background check and sex offender check. Credit and motor vehicle checks are not to be done on the candidate.

Listed under the forms section and in the Appendix are two companies which do background checks as well as a document from the UUA about responsible staffing. The companies listed are recommendations only; congregations may use the company of their choosing.

## **Announcing the Candidate**

Search committees are eager to announce the candidate.

The announcement that a candidate has been found, without revealing the identity of the candidate, can be made after the candidacy has been accepted.

The announcement of the candidate's name can be made when:

1. There is complete agreement on the contract between the negotiating team and candidate.
2. The candidate has agreed and released their signed agreement to do a background check.
3. The minister, if currently serving a congregation, has informed the congregation of their candidacy.

The announcement must wait until all of the above are complete. Once completed, the search committee and candidate should agree that the announcement can be made and what information about the candidate can be shared (website is standard).

## **For Ministers Currently Serving a Congregation**

Ministers currently serving a congregation must let their congregation know they are a candidate. It is not fair to the current congregation or the new congregation to wait until after candidating week to make this news public. There is no room for negotiation on this matter.

Upon accepting the candidacy, the candidate should tell their current congregational president, leadership, staff, and congregation to allow the congregation to move forward on their ministerial needs.

Departing ministers should talk with the Transitions Director about facilitating next steps for their congregation.

## **FAQs**

Why can't we do credit checks?

*It's not essential for good ministry. And it's invasive in ways that can lead to unnecessary judgments. Ministers generally don't ask for a credit check of the congregation's governing board, even though they are the ones responsible for church finances. Most ministers don't have check signing capabilities for the congregation.*

How likely is it that something will come up in a background check for our new minister?

*Very small. Chances are you'll know anything that comes up if you've requested a file summary of the minister. Even then, the overwhelming majority of arrests that show up are for some sort of public protest. Still, every congregation should be able to say at some point they've done this as good standard procedure.*

Doesn't the UUA conduct background checks? Why do we have to handle a background check?

*Ministers who are eligible to use our MinistrySearch system are in good standing with our Association. Our Association does not employ ministers who are serving congregations. As employers, congregations are responsible for the background checks of employees.*

Why can't the minister wait until after candidating week to let their congregation know they are leaving?

*Chances are this will hamper their interim minister selection. It takes about two weeks to get the congregational record for interim search up on MinistrySearch. Since most candidating weeks are late April and early May, that means the congregation's search for a minister would miss the first offer date of interim search and possibly the second offer date.*

## Calendar

Negotiating team and candidate work out contract	Right after offer is accepted
Background check on minister	Right after offer is accepted
Minister informs congregation of departure	Within 10 days of accepting candidate status
Announcement to congregation	After contract agreement is reached, background check is initiated, and minister has informed current congregation

## Forms and Links

- [Responsible Staffing](#)

- [Oxford Document Management Company](#) (background checks)
- [Church Mutual Insurance Company](#) (background checks)

## **MinistrySearch System**

There is no interaction with the system during this phase of search.

## **Other Related Information**

### **Case Study**

Our candidate identifies as a person of color. Every minister of color in our movement has experienced some micro-aggression from the congregations they have served. Should we begin dealing with this in some way when we make the announcement of our candidate to the congregation? Should it wait? (This could be applied easily to other identities too, including trans\*/gender nonbinary candidates).

### **Discussion**

What are the most important things we should say in our announcement about our candidate when we can do that?



# **Phase Seven: Entering Into a New Ministry**

## **Background Information to Improve the Odds of Better Decision Making**

The work of settling a new minister comes to fruition in this phase, though this is more than a vote by the congregation on the candidate. This is a culmination of a process that started with intentionality about two years before to prepare the congregation for its next settled ministry. From moving through the departure of the last settled ministry to transitional ministry to search to entering into a new ministry, the congregation and its search committee have made a great deal of movement and done a great deal of work.

The congregation has placed a lot of trust in the search committee and it is important to know, even at this juncture with the apparent focus on the candidate, the congregation is still looking to the search committee for leadership. As much as eyes and ears are on the candidate, they are equally on the search committee, whom they know better.

And after candidating week is over, there is now the start of a new ministry which will coincide with the end of the current ministry and launch the congregation into the next phase of its life.

## **Key Elements**

### **Candidating Week**

The week usually happens toward the end of April or first of May. Candidating week is a time for congregational leaders, staff, and members to spend time with the candidate(s). The candidate(s) acts as minister during the week, having conferred with the interim about any special circumstances that may arise, but the congregation moves toward seeing the candidate as its minister. The interim minister is usually away during candidating week.

The candidate usually arrives a day before the first Sunday and spends the week leading two services, meeting with leaders, talking with members, engaging staff, searching for housing, and starting to learn the ins and outs of the congregation. Congregants should wear name tags for all events. Introductions, even if they've been done before, are a good idea.

Scheduling of candidating week has already been suggested in the phase three section of this handbook. There should be balance during the week and the candidate should not have to be "on" all the time. Since the candidate is expected to be the minister, the candidate should have time off as well.

The week culminates on the final Sunday with a congregational vote. Most ministers see at least 90% as a successful call and will not agree to go with less (though often congregational by-laws indicate a significantly lower percentage than 90). In general, the search committee and candidate should have a sense by Friday of that week if things are not going well. There should be a quick check-in between the search committee and candidate. If there are concerns, the search committee and minister should check in with the Transitions Director.

The vast majority of candidating weeks culminate in a successful call, however. On average, over the last two decades, there has been one unsuccessful vote every other year.

## **Notice of Call/Contract**

After the contract is signed and the vote confirmed, the [Notice of Ministerial Call](#) form should be submitted to the Transitions Office along with a copy of the signed contract.

## **After Candidating Week**

After candidating week is complete, the search committee should meet to debrief one last time, shred any documents which list applicants' names, and most importantly, to celebrate their good work.

One person from the search committee should act as liaison for questions from the called candidate after candidating week to field questions or direct the candidate in the appropriate direction. The candidate and interim minister should talk about how things will be handed off, and ideally the interim minister and search committee will keep requests from overloading the candidate between the end of candidating week and the start date. It is important for the newly-called candidate to finish their own ministry and for the congregation to work at ending well with the interim minister.

The newly called candidate, congregational leadership, and interim minister, should proceed knowing that there is a current minister under contract. Any involvement with the new minister must go through the current interim minister, and the candidate should not act as minister of the congregation until their contract actually begins.

The congregation should, at the end of the interim ministry, make sure the website is updated. Additionally, a photo directory for the new minister is a welcomed gift. The minister's office should be cleaned and empty of anyone else's belongings before the settled minister's arrival. Repainting the office to the color of the minister's choosing is an added sign of welcome.

## **Arrival**

Most ministers arrive in the area before their start date to settle in a bit, if possible. Often, they are not asked to preach in August, their first month, and see this as a time to begin to know the staff on a daily basis, meet with board members and other leaders, and learn more about the congregation. Embarking on a path of deepening trust building and relationship is crucial to a successful ministry. This is a time of story-telling, and new ministers are encouraged to find out the history behind practices and expectations. Congregants and staff can remind each other that the new minister is in fact new and different from other ministers and not everything will happen in the same way. This is a time for curiosity and kindness.

## Start Up/Covenant

Early in the ministry, the board chair and minister should reach out to the Transitions Program Manager about what resources and assistance are available and recommended for the start of the ministry. Every region may have some differences in what they provide, but the field staff is there to help. Congregations with ministers from historically marginalized identity groups are strongly encouraged to reach out for assistance.

The new minister should become familiar with the current covenants of the congregation (members/staff) if present, and then work to enter into covenant with the congregation, its leaders, and staff. The covenanting process may be a reminder for the congregation or this may be a time of co-creation or mutual alteration. There may be a public welcome and covenant with the new minister.

If the minister was an inside candidate and moved to being the senior minister, attention should be paid by the congregation to understand the minister to be in a new role with new responsibilities. This can be hard for some congregants used to interacting with the minister in their previous role and better to pay attention to this sooner rather than later.

## FAQs

Are spouses and children welcome during candidating week?

*Yes. Participation levels should be left up to the minister and their family. The family also may only be able to come for part of the week due to school or other commitments.*

Why 90% for a call vote? Our by-laws say we only need 2/3 affirmative votes.

*If more than 10% of the members of the congregation vote against the minister, that constitutes a significant group within the congregation—enough to be very problematic were the minister to accept the call.*

Paper ballot or voice vote?

*Most congregations do paper ballot, though it is worth checking to see if the by-laws state one option or the other. If not, it is up to each board to decide. It is also possible to conduct a vote electronically, if the by-laws permit this.*

Who makes the motion to vote?

*Unless your by-laws specifically state otherwise, the motion should come from the chair of the search committee.*

If we have a successful vote, can we have a party with the minister and their family?

*Yes, some congregations do this. Usually, a search committee member votes early, then escorts the minister and their family to lunch. Upon hearing of a successful call, the search committee member takes the minister and family back to the congregation. Some ministers may not want this, however, so options should be checked out before being planned.*

Why is our contact limited with the minister between the call vote and acceptance and their actual start date? We have planning meetings that require the minister.

*First and foremost, the congregation is not yet paying the minister to work. Second, there is a minister in place who is still the minister of the congregation. That should be honored.*

What if something happens during the candidating week, like a member dies?

*The candidate and interim should talk about this in advance, though the candidate should be seen as the minister during that week.*

What if we got less than 90% vote? Do we start all over again?

*Yes and no. No, because this is a new moment. You're not starting where you were two years ago. And yes, in that we recommend a new search committee of completely new members be formed (though this can be discussed with the Transitions Office). It can mean the search committee was more afraid of bringing no one than someone who was not a good match, or that they had disconnected from the congregation and lost touch with what the congregation needed. If the search committee intentionally did not bring forth a candidate, feeling no interested minister would serve them well, then they have in fact done their work and could stay together.*

## Calendar

Candidating week	Late April-Early May
Congregation submits Notice of Call/contract	Soon after candidating week
Ending the interim ministry well	May-July
Arrival	August 1
Start-up/covenanting with UUA staff support	Starting that first fall through following spring

## Forms and Links

[Notice of Ministerial Call](#)

[Ordinations and Installations](#)

## MinistrySearch System

There is no interaction with MinistrySearch system during this phase of search. The Transitions Office will remove the listing from public view, so the search committee should download a PDF

copy of their congregational record for their files. The search committee may request a copy of their congregational record from the Transitions Office at any time after it is archived.

## **Other Related Information**

### **Discussion**

What were we, as a search committee (or minister), most anxious about? What happened with that anxiety? What parts of the search were easier than we thought? Where did we spend too much or too little energy? What advice would you give if you were to talk to a neighboring search committee?

# **The Second Offer Date: If No Match Occurs**

## **Overview**

The second offer date of search is an abbreviated continuation of the search process that allows search committees and ministers in search to take an additional look at potential opportunities. The steps are the same, but on a much shorter timeline.

- The current records and web materials are used, though updates can be made at this time.
- Ministers and search committees will have time to explore interest.
- Interviews (phone or video) will occur. Initial reference checks can be done.
- Congregations and ministers may only schedule one pre-candidating weekend unless they get approval from the Transitions Office. Developed reference checks may be conducted.
- Search committees can extend an offer to a minister for a candidating week.
- A minister may be called after a successful candidating week by the congregation.

Every year, for a variety of reasons, some congregations and some ministers do not find a match. This may be the result of simple bad luck or it may be that the congregation or minister is just not ready for settlement (or other possibilities in between). Not matching after the first offer date could also be the result of a search committee's and/or minister's careful discernment and good judgment about not rushing into the wrong commitment.

Some search committees realize they were close to finding a candidate or feel an obligation and/or pressure to at least look at options so they continue their search. Some ministers feel similarly. Additionally, ministers who were not involved before the first offer date occasionally enter search in time for the second offer date.

The second offer date of search is **optional**.

Every year, some congregations and ministers decide to wait and consider other options, including interim ministry, rather than prepare for the second offer date. Ultimately, each congregation and each searching minister must decide what is best for them.

A second offer date may have financial implications for congregations and the search committee may need to ask the board for a larger budget in addition to getting their consent to continue.

Years of experience have taught that there is both value and risk in preparing for the second offer date. Many search committees and searching ministers have found successful calls and settlements after the second offer date. In some cases, panic and desperation set in, which resulted in poor matches and tumultuous, conflicted ministries. Indeed, a poor match is worse than no match. While it is often hard to see this, especially for search committees, finding no match may be sign of a successful search. Some congregations and ministers just need an extra year. It is important to not lower your standards in order to save face or feel like a success.

For congregations, talking this through with the Transitions Program Manager, regional staff, or the Transitions Office may be useful. For ministers, talking with a trusted colleague or the Transitions Office is also recommended.

## Timing – Second Offer Date

See the calendar on [the Transition website](#) for the exact dates for your search year. Please use the tabs at the bottom of the spreadsheet to find your specific search year.

First Offer Date	End of March
Search committee decision to prepare for second offer date	End of March to early April
Ministers may submit interest to a congregation preparing for the second offer date	Early to mid-April
Names of interested ministers released to search committees	Early to mid-April
Search committee reviews ministerial records and exchanges information with prospective ministers	Mid-April to early May
Video/phone interviews between search committees and potential ministers	Mid-April to early May
Pre-candidating weekends	Late April to mid-May
Candidating weeks	Late May to mid-June
Congregation submits Notice of Call	By June 30

Congregations have a full week following the first offer date to decide to prepare for the second offer date. The search committee should immediately let the Transitions Office know of its decision.

Once the congregations preparing for the second offer date are re-opened for search, ministers will have nearly two weeks to express interest. Ministers who have previously expressed interest in a congregation in the first offer date may not re-express interest in the congregation for the second offer date without the approval of the Transitions Director, who will check with the search committee.

Search committees should review ministerial records, examine websites, and set up phone/video interviews with ministers they wish to pursue. Ministers should feel free to contact current and past ministers who have served the congregation as reference checks. Search committees should begin initial reference checks.

After completing interviews, both search committee and minister should move toward narrowing their list of potential pre-candidates to one, if any. The Transitions Office strongly encourages both search committees and ministers to take a week following an interview to extend or accept a pre-candidating offer. While time feels short, both parties should make a thoughtful and well-considered decision. The time allows for reference checks to be completed and a period of reflection to affirm the initial good feelings. Now is the time to quote the mantra of the Transitions Office, “Better to do this well than to do it quickly.”

After the week, a search committee may extend an offer to a minister to pre-candidate. If the minister accepts, the search committee may now request an interpretive file summary for the pre-candidate from the Transitions Office with at least a week's lead time.

While arranging a neutral pulpit can be trickier in the second offer date, it should not be impossible. If the search for a neutral pulpit gets complicated, please check in with your current minister or the Transitions Office for help.

The pre-candidating weekend for the second offer date should mirror the one(s) before the first offer date unless the search committee has decided they need to do things differently from what they learned the first time. Search committees should consult with the Transitions Program Manager about significant changes. Contracts and compensation should be discussed for deal-breakers at this point but negotiations should not occur until an offer is made. Search committees are urged to follow up with developed references before offering a candidating slot. Ministers are urged to consult with regional staff before accepting an offer to candidate with the congregation.

Candidating weeks should take place as soon as they can be arranged. Upon completion of the candidating week, following a successful call, the congregation should submit a copy of the finalized contract and [Notice of Call](#) form to the Transitions Office by the end of June. If the call was not successful, the congregation and minister should be in quick contact with the Transitions Office to discuss options.

## **Standards**

Search committees and ministers should maintain high standards for the second offer date. While in some cases, the initial standards were set too high, more often than not those preparing for the second offer date lower their standards, often below what might be to their best interest. Search committees should engage in an intentional conversation about their standards. Ministers are encouraged to engage colleagues, including the Transitions Office, about their own search and standards.

## **Staying Positive**

Anxiety often runs higher at this time than during preparation for the first offer date. Both search committees and ministers would do well to name and discuss this anxiety, rather than let it silently drive their search. Again, finding an outside, non-anxious presence (Transitions Program Manager, colleague in ministry, etc.) can be most helpful. Not finding a candidate or position may be a sign of good work and good discernment. Being honest, positive, and patient with yourselves is likely to serve you well.

## **Transitions Program Manager and Transitions Office**

Often during this time, a majority of the consultation happens with the Transitions Office, though the Transitions Program Manager is a good resource for support as well. Search committees should make use of both, especially for counsel. It is strongly recommended to search committees to ask questions via email to both the Transitions Program Manager and the Transitions Office at the same time. With a shorter timing, responsiveness and correct answers become imperative.



## FAQs

Should you prepare for the second offer date of search?

*The search committee should make a recommendation. Ultimately, this is a board decision.*

What should we say to the congregation and when?

*“We were unable to find a suitable match after the first offer date.” This should be said on the first Sunday following the first offer date. Additional information should be provided as appropriate. Remind the congregation that the work of the search committee was to find a good candidate that would minister well here. So far that has not happened, and we’re discerning what serves us all best next.*

If the congregation prepares for the second offer date, does this mean they can’t enter into interim search?

*A congregation can do both. By the time the names of interim ministers are released to congregations, the search committee will know whether or not they have a likely pre-candidate and possibly candidate. Congregational leaders from the board and search committee should be in touch with the Transitions Office for help with navigating the dual process. The same congregational record can be used for both processes.*

Why, as a minister, can I only do one pre-candidating weekend for the second offer date?

*There is only a brief period of time before the congregation must decide whether to continue to pursue a settled ministry or to opt for an interim. The search process is already tough on the congregation and congregations may be out of search budget money. Ministers should be in touch with the Transitions Office throughout the preparation process for the second offer date.*

What are the pitfalls of congregations preparing for the second offer date?

*Search committees often feel desperation, panic, and a sense of failure if they cannot find a candidate. If a poor match is made, a failed, short ministry may be more costly to a congregation (and minister) than doing another year of interim ministry. Many congregations simply are better served with another year of interim ministry.*

*Some search committees rush and do not follow all the steps that they followed for the first offer date. If a search committee has felt particularly overworked, they may not serve the congregation as well in this round.*

*Many congregations have reported that they realized they needed another year of interim work to be ready for a settled minister and didn’t realize this until they made it through the*

*next year. A first search that doesn't find a match may well be indicating simply that the congregation needs more time to be ready for its next settled ministry.*

What are the pitfalls of ministers preparing for the second offer date?

*A minister who did not become a candidate after the first offer date may let factors like salary and prestige affect their choices negatively for the second offer date. In the past, ministers have reported that they failed to ask enough questions when preparing for the second offer date. Ministers need to do thorough research, which may include speaking with the interim minister, previous settled ministers, regional staff, and Transitions Office. The tighter timeline before the second offer date may not allow as much comparison or reflection as a minister needs.*

What does it say about our congregation if we don't find a minister?

*Self-esteem is a big part of a congregation's life, and it's reflected by the search committee. In reality, not finding a minister simply means that the search committee did not find a match from the pool of searching ministers that year. Rarely is there one reason or a simple explanation for this result. Chances are the congregation was somewhat unlucky, had more to learn, or wasn't quite ready for a new settled ministry. It may be that the search committee did its work well and found that no potential ministry they looked at was right for the congregation.*

Can a search committee ask for file summaries of ministers for second offer date consideration?

*Yes. When the search committee has identified a pre-candidate and scheduled the weekend visit, it may request a file summary of that ministerial pre-candidate. Please give the Transitions Office at least a week's notice before the pre-candidating visit to complete the file summary.*

How many names is a congregation likely to receive after the first offer date has passed and before the second offer date?

*Usually there have been one to three new names. Historically, congregations have had as few as none or as many as six.*

Can a minister re-apply to a congregation that didn't consider the minister for the first offer date?

*A minister may request that their name be resubmitted to a congregation that is preparing for the second offer date. The Transitions Office will check with the search committee to see if they will reconsider the minister's credentials. The Transitions Office will ask each search committee if there is anyone on their original list who is still available and whom they would like to pursue for the second offer date. If so, the Transitions Office will ask the minister if they are still interested.*

Can a congregation adjust its congregational record, website, compensation, and/or contract in preparation for the second offer date?

*Yes. Please alert the Transitions Program Manager and the Transitions Office of any and all changes you make ahead of time. If your draft agreement has changed, please send the revised version to the Transitions Office.*

## **Forms and Links**

None

## **MinistrySearch System**

The search committee may make changes to its congregational record. There is no need to re-initiate the search. Interaction with the MinistrySearch system will mirror the above steps from Phases 5-7, but on a more compressed timeline.

# Appendix

## **Important Links**

[Video Version of Settlement Handbook](#)

[Board Checklist for the Settled Search](#)

[UUMA Guidelines](#)

[Second Ministry Search Handbook](#)

[Transitions Support for Congregational Staff](#)

[Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

## **Phase One: Concluding a Ministry Well**

[Notice of Ministerial Transition](#)

[Transitional Ministry Handbook](#)

[Minister Emeritus/a Policies](#)

[Board Checklist for the Settled Search](#)

## **Phase Two: Education and Preparation for Search**

[Finding a Compensation Consultant](#)

[General Compensation Information](#)

[Request Settled Ministry Search Support](#)

[Ministerial Website Template](#)

[Visual Guide: Initiating a Search & Logging into the MinistrySearch System](#)

## **Phase Three: Building the Structure to Search**

[Congregational Covenant](#)

[Ministerial Covenant](#)

[Congregational Survey](#)

[Beyond Categorical Thinking Program Information](#)

[BCT Request Form \(Word\)](#)

[Blank Congregational Record](#)

[Blank Ministerial Record](#)

[Visual Guide: Steps to Completing the Congregational Record](#)

[Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox](#)

[Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries \(Word\)](#)

[Contract Change Form](#)

[Compensation Worksheet](#)

[Sample Interview Questions for Search Committees and Ministers \(xls\)](#)

[Government Reimbursement Rates for Mileage](#)

[Clergy Moving Resource from Maj-Britt Johnson](#)

[Congregational Online Voting Resource](#)

[Theme-Based Candidating Week Model](#)

[A Guide to Process Observation \(from UU Regional Lead Rev. Dr. Ian Evison\)](#)

[Geo Index Listing 2021-2022](#)

#### **Phase Four: Opening Up for the Search**

[Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)

#### **Phase Five: Discernment and Mutual Selection**

[Visual Guide: Release of Ministers' Names](#)

#### **Phase Six: Finalizing the Offer**

[Responsible Staffing](#)

[Oxford Document Management Company \(background checks\)](#)

[Church Mutual Insurance Company \(background checks\)](#)

**Phase Seven: Entering into a New Ministry**

[Notice of Ministerial Call](#)

[Ordinations and Installations](#)

**If No Match Occurs: The Second Offer Date**

None