Ministry Search Handbook:

the unified guide to transitional and settled ministry searches

Updated 01/2026

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Welcome to Search!

A ministry search is an inherently hopeful act. When congregations enter search, they are eager to find a minister who will companion and challenge them into their next chapter. Ministers are excited to find a congregation which wants to do the kind of work which they love and are called to do.

Our Unitarian Universalist ministries matter so much in our lives and to a hurting world. The stakes are high for each ministry search. It is best to approach a ministry search with hope for the future, love for our faith and congregations, inclusive practices, curiosity, candor, self-awareness, and a commitment to good process. These are the antidotes to the anxiety, competitiveness, bias, and sense of urgency or scarcity which can poison a search.

The UUA Transitions Team designed this resource to guide search teams and ministers in increasing their chances of making good matches. No resource can replace relationships. Count on the care and support of UUA staff as you navigate the ministry search process. You are not alone. The work of search feels and IS crucially important. The world needs excellent UU ministry matches! A long line of ministry searches has gone before yours. You have guides and companions for the journey. Though no particular outcome is guaranteed, all will be well.

The handbook

This handbook is a guide to the process of ministry search. In it, the UUA supplies the structure for search, the road map, the cautions and learnings from earlier searches.

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

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

In the past, the UUA Transitions Team has separated search materials for transitional (hired by the board to do particular work for a set period between other ministries) and settled (called by the congregation) ministry search processes. The search processes are increasingly connected and the choice of a type of search is no longer as clear as it once was, so it no longer makes sense to separate search materials into two handbooks.

This handbook is divided into sections designed to reduce overwhelm. Each section will provide you with information about the search process and the rules and recommended practices for each stage of the search. Additionally, we share a little context and background to give you some insight as to why things are the way they are.

While the sections/phases are linear in their presentation, overlaps and pivots occur. This is true for ministers who are in search while serving with a congregation, for congregations which are

engaging the interim ministry while preparing for their next ministry search, and for congregations which need to pivot from one type of search to another if the first type of search they try does not yield a candidate.

This is a searchable document with a detailed table of contents with clickable links. Our hope is that those planning for or engaging in a ministry search will read the sections which are relevant to their circumstances and be able to find information quickly. If some materials seem repetitive, remember this is intentional so the reader may find all their information in a few clicks, rather than by scouring the entire handbook.

We hope the guidance provided here is educational, thought-provoking, and anxiety-reducing for each reader. May this handbook help you to greet with the natural sense of urgency a transition can produce with understanding and confidence.

UUA staff support

The UUA has a mighty network of care for congregations and ministers in transition! The UUA Transitions Team and Congregational Life staff group provide most direct support to ministers, boards, and search teams, but we also have an in-house developer for our search system and staff and volunteers to help with compensation and benefits concerns. Please reach out any time we can help.

UUA Transitions Team:

- **Rev. Patrice Curtis**, Transformational Interim Ministries Director: works with transitional ministers to support them in their role as change agents, main contact for ministers in transitional ministry searches, provides support for inclusion work throughout the search process, manages Break Barriers, Build Beliefs (B4) program
- **Rev. Eric Kaminetzky**, Interim Settled Ministries Director, main contact for ministers in settled and contract-to-call ministry searches, acting in an interim role to support needed evaluation and change for the search process
- **Christine Purcell**, Congregational Transitions Director: holds the ministerial transitions portfolio for the Congregational Life staff group, main contact for search teams and boards in search, manages search team retreat leaders, member of the Congregational Life Leadership Team
- **Amy Szen**, Transitions Administrator: sends communications from the UUA Transitions Team, helps troubleshoot issues with congregational records in the MinistrySearch system, maintains records, helps search teams use the MinistrySearch system

UUA Transitions Team: transitions@uua.org (this email address reaches the whole transitions team.

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

- **Jan Gartner**, Associate Director of Church Staff Finances, provides guidance on equitable compensation and benefits
- **Sean Griffin**, Compensation and Benefits Specialist, provides guidance on equitable compensation and benefits

For compensation questions: comp@uua.org (this email address reaches the compensation team)

For Canadian congregations

Congregations in the Canadian Unitarian Council may avail themselves of UUA support and will use the UUA's process and MinistrySearch system, though their primary support will come from CUC staff.

Ending a Ministry Well

All ministries will end.

We do not often know when and how ministries will end. Sometimes they end because of retirement, death, illness, or disability. Often, the minister and/or congregation know it is time for something else. Sometimes the ending is a surprise, and sometimes an unpleasant one.

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

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

This applies both to ministers and to congregations. It can be tempting to rush to end the ministry and move on to what is next without taking a moment to breathe and reflect. Nothing better sets the stage for the success of a future ministry than the congregation and minister ending the current ministry as well as possible. This begins as soon as the news becomes public that the minister is leaving. This is a moment for the congregation to remember that people will need time to be able to move forward, and that some folks will need more time than others to adjust to this change. 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 create narratives from their 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 next 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. A minister might think, “In my next ministry, I want a congregation that wants me 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.

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

Types of ministerial departures

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

All ministry endings cause different emotions in varying degrees all involved: grief, relief, disappointment, anger, excitement. Congregants do not all feel the same way at the end of a

ministry, and leaders do well to honor disparate feelings, rather than forcing a label or groupthink onto congregants.

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

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

Marginalized identities
Unitarian Universalists work to overcome supremacy from our wider culture that marginalizes people who hold a variety of identities: woman, disabled, fat, neurodivergent, Black, Indigenous, and people of color, non-binary or gender non-conforming, queer, lesbian, gay, bisexual, transgender, and more. A minister's identity or identities may be met with resistance, exclusion, erasure, micro-aggressions or other harmful behavior in a congregation that leads the minister to conclude they will be unable to continue serving that congregation. The effect of this analysis can be difficult to admit. In the report from the Commission on Institutional Change, congregants are encouraged to accept the experiences of the minister as their lived experience and avoid challenging these perspectives. Ministers should bring up such issues to leaders well before an announced departure and should avoid fomenting conflict in the transition time. UUA staff offers support in such cases and exit interviews provide an opportunity to share candid reflections with leadership as the ministry ends.

Minister leaves for a new congregational ministry position
Ministers often leave for a new congregational position, though sometimes the timing can surprise the congregation they are leaving. A shorter-than-expected tenure can cause a congregation to question itself. A longer-than-expected tenure can cause frustration for a congregation and guilt for ministers, who, only when leaving, realize the ministry might have been better ended a year or two before. A settled ministry lasting less than four years can often have a significant detrimental impact on a congregation, both emotionally and financially.

Minister leaves for a new non-congregational ministry position
Sometimes, ministers discover their preferred ministry lies outside of a congregational setting. They may feel their work with a particular congregation has run its course and are unable to move to a new congregation. They may need more traditional work hours to meet family needs.

There may be some combination of reasons for this change in the way they live out their calling. The effects of these moves are often the most easily understood by a congregation, though grief, loss, and relief will still be apparent. Some congregants may also feel the loss of what might have been; of the opportunity and future they hoped this ministry would create.

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

Minister leaves ministry resulting from ministerial misconduct
The impact of ministerial misconduct is traumatic. Often, congregants take sides and there is division in the congregation in the wake of misconduct. Blame can be a significant part of congregational life in the wake of misconduct, both turned inward and outward. Once trust has been violated, it will be slow to rebuild. Feelings are likely to run deep, strong, and long. In the worst case, the congregation no longer understands what ministry is and is supposed to be. Future ministries will need to focus on building trust, maintaining boundaries, abiding by covenant, moving slowly, and ending well. Sometimes, if there are repeated instances of misconduct, it will take multiple ministries for trust in ministry to return.

Notes on misconduct:

- Examples of misconduct include sexual, financial, emotional (e.g., bullying).
- Misconduct is not limited to ministers. Staff members, even congregants, engage in misconduct.
- Unnamed misconduct in a congregation's past has a profound impact on a congregation, perhaps even more profound than named misconduct.

Minister negotiated out of congregation
Negotiated endings are particularly hard on congregations, staff, and ministers. This type of ending is often a result of some unresolved conflict, sometimes from only a small but powerful group or member of a congregation. The ending can catch many members and even the minister by surprise. The desire to keep silent about the conflict inhibits healing for both congregation and minister. Negotiated endings can lead to congregational division, secrets, blaming, and misinformation. The effects can be long-lasting unless both minister and congregation can eventually respond to these three questions with empathy and the ability to take other perspectives into account:

- What happened?
- What happened to the congregation?
- What happened to the minister?

Trust must be rebuilt after a negotiated resignation. Learning must occur for both minister and congregation to avoid repeating patterns. Ministers must remember they must minister to the

entire congregation. Congregants must remember that the minister has their own perspective and still must minister to everyone in the congregation. Not all negotiated endings are a result of misconduct. Congregations with a history of misconduct, especially unacknowledged or unknown misconduct, seem more likely to have negotiated endings than those with no history of misconduct. Often, the negotiated ending amplifies feelings of grief, loss, and relief. The feelings of the loss of opportunity are often more present than the feelings of loss for the ministry ending.

UU Ministers Association Good Officers with the specialized contract/call negotiation support portfolio and UUA Congregational Life staff are trained and equipped to support ministers and congregations in negotiating ministry endings which are as equitable, kind, and clear as possible. Congregational leaders should reach out to their regional staff contact or the Congregational Transitions Director and ministers should reach out to a specialist Good Officer for support as soon as they realize a negotiated ending is likely.

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

To participate in the Service of the Living Tradition, ministers must complete and submit the Intent to Retire form.

For more information about retirement, visit the retirement page on the UUA website.

Please see this article, Six Rules for Letting Go when You Retire, for further reading.

Leaving well

Most ministers and lay leaders are not taught the skill of ending a ministry well. Timing and tone matter. In general, there seems to be less anxiety in both congregation and minister(s), when the departure is announced four to six months before the actual end date. Longer-anticipated departures can be frustrating for the minister and congregation, as often any work happening within the congregation goes on “pause.” Shorter endings can lead to greater congregational anxiety which will affect the congregation for some time. This may still be the better path, given other options.

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

Endings should focus on celebrating accomplishments, expressions of gratitude, and saying good-bye in a way that people will remember with satisfaction. Once the announcement of an ending has been made, it is rare, and even unadvisable, that the departing minister initiate new major projects.

In a good ending with appropriate boundaries:

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

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

People will need to say goodbye in their own time and in their own ways. Congregants will want to talk to the minister. This is a very pastoral time, 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 for punishment. 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.

Expected behavior from congregations when a minister departs

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

Congregational leaders will engage in an exit interview from the region as part of the process (automatically offered for settled ministries, and upon request for other types of ministries). The interview is an opportunity to reflect and move toward a new time in the congregation's life.

Congregations face the complicated task of allowing the current ministry to conclude while, at the same time, preparing for the next ministry. The minister who is leaving is still the congregation's minister until the last day of the contract. Congregational leadership should partner with the current minister to find appropriate ways to be in relationship once the next minister is hired. Congregational leadership should work with the current minister to define appropriate expectations and relationships once the current minister departs.

When the ending is complicated, congregational leadership should exercise diligence in co-creating as good an ending as possible. Congregational leaders should model civility, good manners, and fairness to encourage these same qualities in members. Like the similar expectation of ministers, this is not the time for the congregation, or more likely a congregant, to engage in antagonism, "intense truth-telling," condescending instruction, or bullying of the departing minister. Leaders will be able to tell their stories, on the record, in the exit interview.

Even celebrated and appreciated endings can have complications. There is a difference between appreciation for a ministry and Beloved Former Pastor Syndrome—lionizing a departing minister to the degree that the next ministry partner cannot meet impossible standards. Leaders will do well to reinforce the reality that the next ministry will be different and should be different than the current ministry, even if the current minister is dearly beloved.

Expected behavior from departing ministers

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

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

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

The UUA expects ministers to honor their contracts, engage in an exit interview, and, if the ending was conflicted, engage in a time of reflection overseen by the UUA’s Review Team.

Expected behavior from congregational staff when a minister departs

A ministerial departure has a significant impact on staff. The work of the staff is two-fold here: first, they too must say goodbye to the outgoing minister. They must also serve the congregation, by being present, supporting leaders and the minister and continuing their professional responsibilities and behavior. Anticipating a new supervisor can cause anxiety in congregational staff. If the ending of the ministry is conflicted, the staff should avoid triangulation and taking sides in the conflict. If staff need support, they should find it outside of the congregation, through their professional organizations, therapists, and other sources of support.

Negotiated or conflicted ministry endings

Negotiated endings of ministry partnerships are challenging and can be traumatic. Congregations negotiating the ending of a ministry need support from UUA staff (regional staff, Church Staff Finances, and the Transition Team); ministers need support from colleagues, a UU Ministers Association Good Officer, and UUA staff. A civil ending to a ministry is best, whenever possible. Conflicted endings lead to greater mistrust of ministry within the congregation. Public blaming or shaming statements, entrenched negative feelings, and rigidity are impediments to good process for a minister and congregation negotiating an ending. Self-reflection and learning are helpful, and often both the minister and the congregation need guidance outside of their system to move toward healing.

Congregations with conflicted endings may develop a negative reputation and may have to meet some requirements for future searches. Ministers go through a review process before moving forward to future congregational ministries. For both the congregation and minister, finding a good match in the next attempted settlement can be difficult. The requirement for some sort of non-disclosure agreement in a very conflicted ending often leads to more trauma and distrust. The UUA discourages this practice.

Ministers: review, hold, and settlement restrictions

A negotiated ending from any type of ministry puts a minister on a temporary hold from ministry search until the minister has completed the Review Team Assessment which includes a reflective essay from the minister, completed congregational and ministerial exit interviews, and additional information from regional staff. The Review Team may ask this of a minister when the ending was not defined as negotiated but known to be conflicted, particularly one where the minister may bring the baggage of the last ministry into their next ministry.

- The minister has up to three years from the end date of the ministry to complete the essay before they are referred to the Ministerial Fellowship Committee for a fellowship review.
- Upon completion of the active ministry, receipt of the reflective essay and exit interviews plus information from regional staff, the Review Team will determine the minister's future readiness for parish ministry. The Review Team includes members of the Ministries and Faith Development and Congregational Life staff teams.
- The Review Team may decide to keep the minister on hold pending further ministerial development, place settlement restrictions (overseen by the Review Team) or release the minister to any kind of parish ministry search. Self-reflection, self-awareness, emotional intelligence, responsibility for one's actions, and potential to avoid a similar situation in the future are all factors which will be evaluated.
- "On Hold" means the minister is prohibited from having their ministerial record shared with a congregation for any parish ministry search. Ministers may appeal hold decisions of the Review Team to the Ministerial Fellowship Committee.
- "Settlement Restriction" means the minister may be considered for certain parish ministry settings with the oversight of the Review Team. These restrictions can include, but are not limited to setting, duration, percentage of full-time, required mentorship, continuing education, and therapy. Settlement restrictions may be lifted by the Review Team.

Congregational accountability in negotiated endings

After a negotiated or conflicted ministry ending, congregations are held in special care by UUA staff. Regional staff and the UUA Transitions Team will work with leaders to determine the best way forward with a ministry search. The congregation would not be well-served by pretending nothing happened and looking for a new minister without reflecting on what went wrong and shoring up their congregational system and relationships. See this section for more information on how UUA staff works with congregational leaders after a negotiated or complex ministry ending: What Type of Ministry Should Be Next for My Congregation?

Exit interview process

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

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

The process is overseen by UUA regional staff. A regional staff member sets up and conducts the interviews. They are encouraged to share any insights they have as well. The interviews are shared only with the outgoing minister, congregational leadership, regional staff, the UUA Transitions Team, and, if requested, the incoming interim and settled minister.

An interview will be conducted with the outgoing minister. Another interview will be conducted with the congregational board. Regional staff will take notes on interview responses, share the notes with interviewees to make sure they reflect what was said and intended, and share and store the approved interview notes appropriately. Both leadership and minister are encouraged to share what worked well and what each wish they had gone better or produced a different outcome. In some cases, the regional staff may also interview congregational staff.

Exit Interviews

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

Sample ministerial exit interview

To be conducted with the departing minister of the congregation by a member of the Congregational Life staff group (regional staff) or designee.

Introduction

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

Regional staff will provide written copies of the report to the minister, the governing board of the congregation, and the UUA Transitions Team. A copy should be kept for regional files.

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

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

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

Date of interview:	
Congregation:	
City & State/Province:	
Name of departing minister(s):	
Date of minister's departure:	
Name of interviewer:	

Exit Interview Questions:

- 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 this shared ministry? *Some examples: boundaries, healthy relations policies/processes,* identity-based bias/conflict, *bullying (and tolerance for bullying), covenant, unspoken expectations, or issues with trust, power, or authority*
- How was the ministry shared between the minister, staff, and lay people?
- Were there any cultural shifts in the congregation during this ministry? *Some examples: inclusion, generosity, trust, and justice focus.*
- What are your hopes for the future of this congregation's ministry?

Sample congregational transition interview

To be conducted with the lay leadership of the congregation by a member of the Congregational Life staff group (regional staff) or designee.

Introduction

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

Regional staff will provide written copies of the report to the board chair (or designee), the departing minister, and the UUA Transitions Team.

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

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

- the congregation has checked whether it follows its by-laws regarding such matters as termination, call, and committee on ministry, and whether its by-laws serve them well (experience of field staff and the UUA Transitions Team, for example, suggests that a call of a minister should require at least a 90% vote and for dismissal 30% should be sufficient),
- the congregation has thoughtfully considered the appropriate pace and process for its search process,
- the congregation understands the roles of the Congregational Transitions Director (the person in the Congregational Life staff group with the nationwide transitions portfolio) and the Compensation Consultant and has planned to meet with them at the appropriate point in its process, and/or
- The congregation needs any other assistance.

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

Transition Interview Questions:

- 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 this shared ministry? *Some examples: boundaries, healthy relations policies/processes,* identity-based bias/conflict, *bullying (and tolerance for bullying), covenant, unspoken expectations, or issues with trust, power, or authority*
- How was the ministry shared between the minister, staff, and lay people?
- How did identity bias (gender, sexuality, ableism) contribute to challenges the minister experienced?
- Were there any cultural shifts in the congregation during this ministry? *Some examples: inclusion, generosity, trust, and justice focus.*
- What are your hopes for the future of this congregation's ministry?

Sample regional staff reflection on transition

Ministerial Transitions Regional Staff Report
Regional staff are asked to share information from their perspective that will help the congregation. These reports may be submitted with the exit and transitions interviews to transitions@uua.org.

Based on the delicate nature that may be required in some situations, regional staff can request confidentiality on all but the last two questions if needed.

Questions

1. What went well during this ministry?
2. What did not go well?
3. What kind of minister would be a good fit for this congregation?
4. How did identity bias (race, gender, sexuality, ablity) impact the minister and ministry?
5. How has the congregation changed due to this ministry?
6. Is the congregation stuck in a rut or in the past?
7. How well is the congregation connected to the larger movement? To the wider community?

To be shared with congregational leadership, the departing minister, and future minister who serve with this congregation:

1. What would you tell the congregation they need to focus attention on during the interim ministry?

2. What are your hopes for this congregation?

Exit interviews for other ministerial positions

When a ministry ends, congregations and ministers benefit from reflection on the course of the ministry with the congregation.

- Settled ministers go through an exit interview process usually overseen by congregational life staff.
- Interim ministers have final evaluations of the ministry. The minister does their own evaluation of the ministry, and the congregational leadership does its own.
- In developmental ministry, the leadership and minister complete a joint evaluation of the developmental ministry.
- Contract ministries have historically not had evaluations which are shared with the UUA, but they may be evaluated.

Not only do the congregation and minister benefit from the evaluation and self-reflection, but ultimately other congregations and ministers benefit. Evaluations shared with the UUA allow our faith to share learnings from a particular ministry to assist our congregations, our ministers, and our faith.

For Ministers in Search

A ministry search heralds a significant shift for ministers, whether you are new to fellowship and searching for the first time or you have searched many times in the past. As you begin to consider a search, seek the counsel of wise colleagues, including those on UUA staff. Review the UU Ministers Association Guidelines for the Conduct of Ministry, especially if you are ending a ministry. A network of support exists for you as you make big decisions about the partnership ahead!

As you prepare to leave, abide by the terms of your contract. Be clear and kind. Have firm boundaries. If the ending is conflicted, surround yourself with wise and caring people outside of the congregational system who can help you keep your perspective and give you an outlet so you don't lash out at congregants. Tell the truth in the exit interview. Find a way to discharge some of the hurt and distrust from this partnership so you don't carry it into your next ministry.

Knowing when to end a ministry

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

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

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

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

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

UUA Transitions Team staff will be glad to listen to your ideas and concerns and to help you plan a good ending of your ministry. Don't hesitate to reach out: transitions@uua.org.

Considerations for a search

Here are some considerations as you begin to work on your search profile and check out the congregations in search in the MinistrySearch system:

- Have you identified your ministry gifts, skills, and particular interests? How do you hope to engage them in a congregational setting?
- What will help you thrive in a congregational setting? What would make ministry challenging or undesirable for you in a congregational setting? What is your plan to determine if a congregation has these traits?
- What does your family need to thrive?
    - If you hold (or a family member holds) a targeted identity, does the state provide protection that will help? Will you and they feel safe?
    - Will your spouse need a job if you relocate? How are job searches in their industry near this congregation?
    - Do you need a school system for your child that can meet specific needs?
- Geographically, where do you have emotional support? Will a ministry opportunity place you close to family, friends, and/or colleagues?
- What do you know about the culture in areas you are considering? How comfortable are you in navigating this culture?
- Do you understand how cost of living in an area determines the spending power of your salary? *Learn more about the advice congregations receive about setting ministerial salaries here: https://www.uua.org/leaderlab/congregational-salary*
- What does housing cost near the congregation? How is the market? *Once you have applied, you can ask the search team to help you find information or a local contact who can answer your questions.*
    - Link to fair market rental info: https://www.rentdata.org/lookup
    - Link to rental market trends and listings by city or zip code: https://www.zillow.com/rental-manager/market-trends/
- Does this congregation offer all the benefits you and your family will need? *Please refer to the supplied draft ministerial agreement in the compensation and benefits section of each congregational record/search profile and pay special attention to any modifications from the UUA/UUMA recommended model agreement.*
- Search teams want to see videos of your sermons and learn more about you. How will you present additional information? Do you have a website, or will you supply a curated list of links? What will a search engine inquiry reveal about you?
- How are you presenting yourself? Does your ministerial record paint you as an academic or consultant? Does it humanize you and convey warmth?

Using the MinistrySearch system

As you prepare for search, you will create or update your ministerial record (MR, also known as a search profile) in the MinistrySearch system. You will submit that record to ministry search teams once you have read their search profiles when you would like to apply.

Please click on the “Stay informed” button in your ministerial record to receive updates on kinds of search in each search cycle. Alternatively, you may sign up for the UUA Transitions Team newsletter to receive general search updates.

Timing of searches

Please pay attention to the search calendars, as they shift a bit between search cycles. Dates and reminders are in our search newsletters, as well. Deadlines are firm unless otherwise indicated.

For a settled ministry search:

- Calendar link: https://www.uua.org/files/2024-06/Settled_Search_Calendar.pdf
- congregational search profiles will be published on 02 December
- you may apply by 02 January (or as late as 16 January, if needed)
- interview with congregations and learn about them from their document packets between 02 and 22 January
- receive pre-candidate invitations on 23 January
- accept pre-candidate invitations on or after 24 January
- schedule precandidate weekend visits to occur in this window: 06 February to 15 March
- submit rankings to UUA on or by 23 March: https://uua.wufoo.com/forms/ministers-ranking-of-congregations
- receive match news on 25 March
- offer day: noon Eastern on 26 March

For a developmental ministry search:

- congregational search profiles will be published on 31 January
- check in with regional UUA staff about alignment and apply by 02 March
- by 06 March, regional staff decide which applicants could be a good match for the congregations' needs and the UUA Transitions Team releases those applicant names to search teams
- interview with search teams and continue your research in mid-March
- submit rankings to UUA on or by 23 March: https://uua.wufoo.com/forms/ministers-ranking-of-congregations
- receive match news on 25 March
- offer day: noon Eastern on 26 March

For a contract ministry search:

For **Primetime** (timed to coincide with the settled search process) contract ministry searches, congregational search profiles will be published between 02 December and 15 February

- calendar link: https://www.uua.org/files/2025-07/Contract_Search_Calendar.pdf
- submit rankings to UUA on or by 23 March: https://uua.wufoo.com/forms/ministers-ranking-of-congregations
- receive match news on 25 March
- offer day: noon Eastern on 26 March

For an **Open** (timed to the interim search or later) contract ministry search, congregational search profiles will be published on or after 01 April

- Apply and accept offers at will

For an interim ministry search:

- calendar link: https://www.uua.org/files/2025-01/Interim_Search_Calendar.pdf
- search profiles published between 03 and 22 April

- Transitional UUMA chapter gathering: 20-24 April
- application deadline 04 May (link to ranking of preference in calendar)
- applicant names released to search team 06 May
- submit rankings to UUA Transitions team (link for this form in calendar) 18 May
- offer day: 21 May, noon eastern time

Your congregational research

The UUA Transitions Team wants to empower ministers to do their due diligence when considering serving with a congregation. We expect and request that you will reach out to the following people as you research congregations which you are seriously considering:

- **The UUA Congregational Life regional staff team member who is the primary contact for the congregation:** search profiles list the staff member who works closely with the congregation. They would love to discuss congregational needs and context with you.
- **Other ministers connected to the congregation**: departing or most recent minister, another previous minister, or another minister on staff who is not the senior minister may have key insights to share which can help you determine a good alignment with a congregation

Eligibility for ministers in 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 of 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 Ministerial Fellowship Committee (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 Credentialing Director, in consultation with the UUA Transitions Team, can approve specific requests of candidates for contract ministries only of no more than one year. Students and Ministerial Candidates who have not seen the MFC must obtain permission from the Credentialing Director for permission before reaching out to the UUA Transitions Team about potential positions they could serve.
- 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.
- All ministers are encouraged to be members of the UU Ministers Association (UUMA). All ministers in search must follow the guidelines of the UUMA whether they are a member or not.

Three-year rule

for intern and student ministers, interim ministers, and other professional staff

- Per Ministerial Fellowship Committee rules, a minister is not eligible for employment in a ministerial capacity in a congregation for at least three years following previous engagement as an intern or interim minister in that congregation. Waivers may be granted by application to the Ministerial Fellowship Committee.

Inside candidate and professional engagement rule

- Per Ministerial Fellowship Committee rules, any minister who has visited a congregation in a professional capacity after the most recent settled minister has announced their departure to the congregation, or who is either employed by or a member of a congregation seeking to fill another ministerial position on staff may only apply for such a position as an inside candidate (see process below) to be considered before the UUA Transitions Team has submitted a list of potential candidates to that congregation.
- Per UUA Transitions Team policy, to promote fairness to inside candidates and potential external applicants, a decision about the candidacy of the inside candidate must be made before the search is opened to potential external applicants. **This policy applies only to full-time positions.**

Inside candidate process for a contract ministry (board hire)

Per Ministerial Fellowship Committee rules and UUA Transitions Team policy, certain ministers are only eligible to be hired by a congregation through a full-time transitional ministry search process as an inside candidate:

- a minister who is a member or staff member of a congregation seeking a transitional minister (this could be a contract minister who is serving year-to-year or a second minister)
- an affiliated community minister
- a minister who has visited the congregation in a professional capacity since the departure of the most recent settled minister was announced.

The process modifications for inside candidate consideration are simple and much of the process remains intact:

- The board appoints a search team.
- Inside candidates must express interest to the search team and the UUA Transitions Team early in the process.
- If a congregation has more than one inside candidate, they should contact the UUA Transitions Team for guidance on how to proceed.
- If an inside candidate signals interest in the position, the search team must consider whether they will consider an inside candidate.
- If the search team is willing to consider an inside candidate, they prepare the congregational record and the other documents listed in the relevant section of this handbook and share the materials with the inside candidate.

- The search team requests the ministerial record of their inside candidate from the UUA Transitions Team.
- The search team evaluates the inside candidate before their congregational record is published for potential external applicant review.
- The search team decides whether to hire the inside candidate or recommend a hire to the board, in alignment with the board's charge to the search team.
- If the decision is made to hire the inside candidate, the ministerial agreement (contract) is negotiated.
- If the inside candidate is not hired, the congregational record may be published for potential external applicant review. The remainder of the search process from this point aligns with the process described in the relevant section of this handbook (interim, developmental, contract).
- *This process is slightly different for a settled ministry search, as the search team is assembled differently, and the search team decides whether to recommend the candidacy for a congregational vote to call instead of making a hiring recommendation.*

UUA Transitions Team and UUMA support

- For support on transitions ministry searches (those with a defined term which will not lead to a call), reach out to Rev. Patrice K. Curtis ("PK"), Transformational Interim Ministries Director (pcurtis@uua.org). They are here to support you in conversation, offer specialized training, and help you to find the resources you need.
- For ministries without defined term limits, and for those which may lead to a call, please contact Rev. Eric Kaminetzky, Interim Settled Ministries Director: ekaminetzky@uua.org.
- If there is a piece of information you wish you had about a congregation before deciding whether to apply, please reach out to Christine Purcell, the Congregational Transitions Director, Christine Purcell, who may know the answer or will get it for you: cpurcell@uua.org. Please contact her, as well, if a search team behaves in an irregular way in their interactions with you.
- For contract advice and negotiation support, contact UU Ministers Association Good Officers with the contract and call specialty: https://uuma.org/collegiality/the-ministry-of-good-offices/

What Type of Ministry Should Be Next for a Congregation?

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, UUA 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 poor, brief, or 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, offering support, and recommending an appropriate type of search before initiating a ministerial search adds parallel 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 into ministry searches, the UUA Congregational Life staff team hopes to support congregational leaders in making decisions that will yield sustainable, vital future ministry matches.

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
- Anti-racism/anti-oppression/multicultural (AR/AO/MC) commitment, including participation in "Break Barriers, Build Beliefs" during settled search (or "Beyond Categorical Thinking" for older search processes)
- 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 congregations with significant conflict or misconduct would benefit and welcome UUA curation of the list of applicants (ministers with full fellowship or a particular type of experience, for example)
- Cultural or structural change work which the congregation wants or needs to engage
- The congregational understanding of Unitarian Universalist theology

- The understanding of the discipline and practice of covenant

When UUA staff considers a congregation's needs and context, they may not recommend a certain type of ministry search 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. A recommended extra year of interim ministry or a pivot to developmental ministry can make a significant difference for congregations working on structural or cultural change work between settled ministries.

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. This is the type of ministry search which is recommended for congregations with fewer than 125 members. These positions may be part- or full-time.
- **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 and approved by Congregational Life staff, often suggested by 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 team. This is an open-ended ministry, unlike transitional ministries, which have renewable one-year agreements.

Download or print a brief description of the types of ministries and searches here.

In addition to recommending types of ministry search, UUA Congregational Life staff members:

- offer and suggest support which could take many forms and be ongoing: coaching, training, leadership experiences, the Hope for Us conflict engagement process, UU Leadership Institute courses, developmental ministry, etc.
- review all congregations' ministry search profiles before publication and, in some cases, offer guidance on congregational needs and history to include in the search profiles to maximize the chance that applicant ministers will understand and be equipped for the challenges the congregation has faced or is facing. When congregational leaders gloss over past misconduct or current conflict, for example, ministers do not know what they need to know before applying.
- provide support, upon request, to congregational leaders and ministers in adapting the standard agreement/contract as part of the negotiation process. UU Ministers Association Good Officers Contract/Call Negotiation Support Specialists can support ministers in this work, as well.

Contract vs. settled ministry: a sea change

In recent years, more congregations than ever before have chosen the contract search process over other types of ministry search. They have done so for several reasons:

- The contract search process is less expensive and easier on volunteers than the settled search process.
- They like the flexibility of being in partnership with a minister for a couple of years before deciding mutually whether to move toward a call process.
- They are uncertain if they will be able to sustain full-time, fair compensation for four or more years, which is a firm expectation of congregations in the settled search process.
- They want to have more time to consider applicants and be considered by applicants than the narrow window of consideration in faster-moving ministry searches.
- They know that in the last decade, congregations with fewer than 125 members and those offering part-time ministry opportunities had fewer (or no) applicants in the interim, developmental, and settled searches as ministers think more carefully about the sustainability of ministry in our changing and challenging economic landscape.

Some ministers mourn the loss of the traditional approach to being called to serve with a congregation, missing the time when far more congregations and ministers entered the settled search process and made deep, open-ended commitments to one another at the end of the annual search cycle. Other ministers have embraced the shift toward flexible, defined term ministry with joy and interest. This change echoes a broader generational shift in the world of work: people today are far less likely than in decades past to remain in one position for most or all of their careers.

Contracted ministry is flexible ministry; it is not lesser than settled ministry. With the average ministerial tenure now lasting seven years or fewer, past misconceptions about the diminished status of contract, flexible ministry no longer hold. Flex ministry is an asset to congregations. The ability to navigate change skillfully is one of the most vital traits a minister can possess in a dynamic world. Indeed, a contract may result in a ministry that lasts for the typical span of a settled ministry. As such, contract ministry may be a type of transitional ministry *or* encompass the typical context and content of settled ministry.

Change does not equal decline—but failure to change guarantees it. All ministry is about change, whether we acknowledge it or not.

When entering a contract search, regional staff can help congregational leaders determine whether your contract ministry should have a transitional focus or if it could lead to a call in a couple of years. A contract search is not a way to skip needed interim ministry work.

Multi-year contract positions with a developmental ministry focus or the possibility of a call were common and extremely attractive to searching ministers in the 2025 search cycle, drawing as many applicants, in some cases, as the most popular settled searches. It is interesting to note that there was greater diversity amongst the ministers who chose multi-year contract ministries than amongst those who chose settled positions in 2025. With 82% of the applicants in the 2025

settled search also applying for contract positions, and many of them choosing the contract positions over the possibilities for immediate settlement, we notice that ministers, in general, are less concerned with the form of the search or the label of the type of ministry than they are with these three considerations:

- **Compensation:** Does this congregation offer sustainable compensation which meets my needs and the needs of my family? Can I afford to buy a home and live a good life there with this compensation?
- **Location:** *This has always been an extremely important factor, though ministers seem to define favorable geography differently than they did before COVID began, with slightly less of a focus on the coasts and major metropolitan areas.* Do I want to live in this area? Will I be safe and comfortable there (particularly true of ministers and their families with marginalized identities)? Will I be close to my family and support network? Can my spouse find a job there? Do my children want to go to college there (in-state tuition)?
- **Congregational self-awareness:** Does the congregation describe itself in nuanced ways? Can I imagine the ministry partnership based on what they have said about themselves? Has the search team provided a profile which is too rosy or too negative? Has the congregation done the needed transitional ministry since the ending of a long-settled ministry or in the wake of significant conflict or misconduct? Does the search profile match what my ministerial colleagues have said about serving with this congregation?

The truth is that no type of ministry or search is inherently better or more important than the others. UUA Congregational Life (regional) staff work with leaders of congregations to think through the next, best move in seeking ministry partnership, and make binding recommendations about the types of ministry search which are open to congregations. UUA Ministries and Faith Development staff and UUMA mentors and colleagues support ministers in making good choices for their ministry careers. We have vital ministry to do regardless of the path we take to forming ministry partnerships.

Covenant for Search Processes

Unitarian Universalism is a covenantal faith. All searching congregations, searching ministers, and those who assist congregations and ministers in the search process covenant with one another for a fair and responsible search process. This 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.

- Only congregations and ministers who have agreed to covenant are eligible to participate in the UUA's ministry search process.
- 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 who break covenant will be referred to those who supervise them.
- Search teams and ministers agree to enter into the search covenant by ticking the covenant box in your MinistrySearch profile; there is no separate form to fill out or submit.
- Volunteers and UUA Staff agree to follow the covenant in their work to support ministry transitions. The UUA Transitions Team fully abides by the covenant below.

Covenant for searching congregations

The UUA Transitions Team encourages search teams to make a more relational covenant to guide their work and establish their team culture. *This* covenant is for fair process in search with the UUA.

As a search team representing our congregation, we agree:

- to 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 and interact with applicants with honesty, care, compassion, and respect.
- to follow the rules and timelines within the Ministry Search Handbook and other UUA search materials.
- to honor a minister's needs to follow the UU Ministers Association guidelines (regardless of membership).
- not to perpetuate historic differences in compensation and benefits based upon gender, race, ethnicity, ability, and other marginalized identities. We understand that ministers will communicate with UUA staff and UU Ministers Association Good Officers regarding the terms of the agreement offered.
- to inform and work with the UUA Transitions Team and regional staff throughout the search process.

- to understand and honor the need for fairness and confidentiality throughout the search process.

Special circumstances:

Interim ministry (on behalf of leadership and the congregation):

- We agree to not to ask the interim to be a candidate for a congregation's settled position and understand that that the interim may not apply to a position with our congregation that starts within 3 years of their last day as interim minister.
- We agree to complete interim progress appraisals as required.
- We agree to fund the training cost of the interim minister, if they have not completed the transitional ministry training already.
- We understand that an interim minister must have a mentor (all except Accredited Interim Ministers) or collegial support system (AIMS only) during the interim ministry.
- We understand the need for fairness throughout the search and interim period. We agree to abide by the interim search rules as well as to support interim ministry in our congregation throughout the interim period.

Developmental ministry (on behalf of leadership and the congregation):

- We understand that the developmental minister will leave at the end of the developmental ministry (usually not longer than seven years) and agree to not to ask the developmental minister to be a candidate for a congregation's settled ministry position or stay beyond the developmental ministry.
- We agree to complete developmental ministry progress appraisals as required.
- We agree to fund the training cost of the developmental minister, if they have not completed the transitional ministry training already.

Covenant for searching ministers

As a Unitarian Universalist minister representing our faith, I agree:

- to 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.
- to follow the rules and timelines within the Ministry Search Handbook and other UUA search materials.
- to follow UU Ministers Association guidelines (regardless of membership).

- to inform and work with the UUA Transitions Team and regional staff throughout the transitional process.
- to understand and honor the need for fairness and confidentiality throughout the search process.

Special circumstances:

Interim ministry:

I agree:

- not be a candidate for a congregation's settled position and will not apply to a position that starts within 3 years of my last day as interim minister.
- complete interim progress appraisals as required.
- complete the initial training for transitional ministers, if I have not already done so.
- have a mentor (all except Accredited Interim Ministers) or collegial support system (AIMS only) during the interim ministry.
- support my interim ministry colleagues throughout the search and interim period.

Developmental ministry:

I agree to:

- leave at the end of the developmental ministry term and clear any extension beyond seven years with the UUA Transitions Team.
- complete developmental ministry evaluations as required
- complete the initial training for transitional ministers, if I have not already done so.

Covenant for UUA staff and volunteers who support transitions

As the UUA Transitions Team, UUA staff, and search volunteers representing our faith, we covenant to:

- 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.
- serve ministers in search to the best of our ability. We pledge to interact with each minister we encounter in the search process with respect, kindness, and authenticity.

- serve our Unitarian Universalist faith in a way that reflects its values and manage the ministerial search process in a way that respects all involved.

What is Transitional Ministry?

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

Transitional ministry has a defined term which begins with a hire by the governing board. This is different from a settled ministry, which is open-ended, has a year-long search process conducted by a team elected from the congregation, and begins with a congregational vote.

Any search for a ministry position which is not full-time is considered a contract ministry search by the UUA Transitions Team. Full-time contract ministry searches are also possible. While congregations may call the ministry by another name, the rules for contract ministry searches apply. Contract ministry searches are more flexible and easier on congregations, and may, unlike developmental and interim ministry, lead to a call and a settled position.

An introduction to each type of transitional ministry

Interim

Interim ministry is a transitional ministry designed to help a congregation move from one settled ministry to the next settled ministry or from a settled ministry to a developmental ministry. Most interim ministries last 24 months, though occasionally the ministry may extend to a third year, especially in cases when the previous settled ministry was long or conflicted. An interim minister assists the congregation in moving beyond its last ministry and equipping itself for a new, different ministry. This preparation involves helping the congregation look at practices that may or may not be serving them well, assisting through the emotional process of transition, setting sights forward, and connecting the congregation to needed resources. The interim minister is hired by the board of trustees. Interim ministers may not be called by the congregation. Most congregations planning to continue in full-time ministry after a settlement use this option for their transition.

Contract

Contract ministry can take many forms and may not always be transitional. Congregations with fewer than 125 members and those with part-time ministry positions use the contract ministry search process because of its flexibility and simplicity. Some form of contract ministry is usually available to most congregations in search as an option. If a congregation does not find a match in another type of ministry search, they may shift to a contract search.

- Sometimes a congregation is unsure about ministry and/or how much of it they need or can sustain financially. The congregation decides to contract with a minister for a year or more, with the option to renew as the contract ends. **This is Flex Contract ministry.** The congregation sometimes has very specific duties for the minister, especially in part-time ministries.

- Sometimes the congregation is coming out of a settled ministry, or out of a contract ministry that lasted three or more years. The congregation may or may not first try to find an interim minister, but the board realizes that the congregation needs to do grapple with

big change, as they transition from one minister to another. **This is Transitional Contract ministry and may not lead to a call.**

- Sometimes the congregation hopes to call a minister and uses this ministry as a test period—to see whether the shared ministry is good, and to provide ministry while the congregation assesses its needs. A contract minister may be called after a couple of years of ministry partnership, if there is a desire to do this which is shared by the minister and the congregation (see process for doing so in the Contract to Call section of this handbook). **This is Contract to Call ministry.**

Developmental

Developmental ministry is an option for congregations with a history of repeated short ministries or chronic conflict, or those with systemic work to do before calling a new minister. They exhibit a need to make structural or cultural changes and have the self-awareness, desire, and capacity to make meaningful changes. Some congregations need longer than a typical interim ministry to work on deep-seated issues and patterns that have kept the congregation circling in place or heading in a negative direction.

Developmental Ministry is a cooperative program between Congregational Life (CL) Staff and the UUA Transitions Team. These UUA staff colleagues work with a congregation to identify the deeper issues underlying the recurring symptoms of burnout, inadequate financing, low volunteer satisfaction, ministerial turnover, or conflict. Congregational leaders may ask for developmental ministry as they recognize a troubling situation or unique opportunity for meaningful change, or an interim minister and/or CL staff may recommend it. The congregation must be approved by CL staff before they enter the program. Leaders work with CL staff during a transition to prepare for developmental ministry. During a developmental ministry, the congregation and minister work collaboratively with CL staff and the UUA to increase the odds of realizing the deep change sought by the congregation.

Developmental ministries have been most successful with a 4-7-year term. The developmental minister is not eligible for the called ministry of the congregation, as a good ending is part of the curriculum of the developmental ministry. In the last year of a developmental ministry, the congregation typically engages their next search for a settled minister. After this significant work in the congregation, there is no desire or need to have an interim ministry before the next settlement.

Download or print a brief description of the types of ministries and searches here.

Interim Ministry Overview

When it works:

- Interim ministries follow most full-time, settled ministries.
- Interim ministers serve most congregations well, even, sometimes, when the congregation thinks the interim has not. Frustration within the congregation can be directed at the next minister in many ways. When these frustrations are directed at the newly settled minister, shorter settled ministries ensue. It is better to use an interim time to deal with these frustrations in a period of purposeful disequilibrium than to unintentionally create a transitional minister out of the newly settled minister.
- Additionally, congregations may have areas of neglect and/or unproductive patterns that need attention. The interim helps the congregation refocus to improve the odds of a successful settled ministry.
- Following a particularly traumatic, intense, or surprising ending, an interim can work with the congregation to bring stability, reflection, and openness to a new future.

When it doesn't work:

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

Reminders:

- If a congregation had a particularly anxious time with a previous interim minister, they are better served by clearly stating what did not work with that interim ministry in their search materials, than thinking interim ministry is the problem. Like snowflakes and settled ministers, no two interims are alike.
- Interim ministers cannot become the next settled minister.

Notes about the interim ministry search process

- The search for an interim minister takes place in April and May of each year for an August 01 start.
- **Congregations seeking a minister at less than full time use the contract ministry search process.** A contract ministry with an interim focus is possible, though the settled ministry search is open only to full-time searches. The transitional ministry training which interim ministers receive from the UUA and Interim Ministry Network is open to contract ministers.
- Congregations seeking a part-time minister and those with fewer than 125 members (even those seeking full-time ministry) use the contract ministry search process.
- We know that congregations sometimes learn that they will be in search while pledge drives are on-going and a full financial picture for the year ahead is still unclear. We can initiate an interim profile for your congregation, at your request, while leadership figures out if full-time ministry is affordable and sustainable. We can transfer your interim search profile responses to a contract search profile (part-time or full-time), if needed, before publication if it becomes clear to leadership that this is the better way forward for your congregation.

- The interim search moves quickly, so the interim search team should be prepared to prioritize this search over the several weeks it normally takes to conduct it.
- We strongly recommend you read *In the Interim: Strategies for Interim Ministers and Congregations, 2nd Edition* available from the UUA Bookstore, but if you are close to the April application deadline, feel free to submit your application first.
- The name of every minister who expresses an interest in your congregation will be released to you, up to six names.
- You may choose to limit the number of names you receive (2-6 names)
- If your congregation had a difficult interim experience in the past, please arrange to speak with your regional staff or UUA Transitions Team. This should not deter you from searching for an interim minister, but it can shape how you search for your next, different interim minister.
- When reviewing a congregational profile, ministers look for fair compensation and authenticity. They are most interested in a congregation which honestly expresses its challenges, successes, and needs. They want an opportunity to do real work with a congregation looking to get ready for its next settled ministry.

Duration of interim ministry

- Years ago, congregations engaging at least a 24-month interim ministry period had a much greater success rate (90%) at calling a minister following their interim period than congregations doing only a single year of interim ministry (56%), so the UUA no longer recommends one-year interim ministry periods.
- Settled ministry search teams have more time and seem to be more discerning and open when elected after the interim minister has arrived than during the end of the settled ministry. Search teams need a full year to do their work well. Search teams selected after an interim minister has arrived tend to be able to look forward and are more likely to see future needs than committees elected before the settled minister departs. Search teams selected while a settled minister is still serving the congregation tend to gaze backwards and are more reactive and less open to a new and different minister and ministry.
- Congregations planning for two years of interim ministry should do so with a contract for one year which may be renewed for the second year. Doing so allows for the possibility of a graceful exit if the interim and congregation do not match well. Additionally, some congregations are simply better served by two different interims.
- The UUA Transition Team may approve the extension of an interim ministry to a third year at the mutual request of the congregation and the interim minister.

Interim ministry search covenants

On behalf of congregational boards, search teams enter into covenant using the checkbox in their search profile in the MinistrySearch system. Applicant ministers do the same in their search profiles. Participation in interim search requires agreeing to and following the covenant (see covenant section).

The interim ministry search process

1. Let the UUA Transitions Team know that you are anticipating a ministerial transition within six months of the end date of the ministry by completing the Notice of Ministerial Transition
2. **Board and search team members may contact Christine Purcell, Congregational Transitions Director, at any time during the transitional period for support: cpurcell@uua.org.** She holds open office hours each week on Zoom for those in transitional ministry searches on Tuesdays from 3:00-5:00 PM Eastern time: https://uua.zoom.us/j/95425414067
3. The board should review the sections of this handbook on ending a ministry well and on interim ministry.
4. The board should discuss your ministry needs with your congregation's primary contact on the UUA's regional staff team and arrange to complete an exit interview process with them (if you are not sure whom to contact, Christine Purcell can connect you: cpurcell@uua.org). Your primary contact, with assistance from the UUA transitions team, will offer customized recommendations for your ministry search based on timing, finances, congregational needs, etc.
5. Your governing board should examine your congregation's bylaws to see how ministry search is presented to ensure a smooth interim search process. If the board perceives a misalignment between the requirements of the bylaws and UUA process (if the congregation must vote on a transitional ministry, for example), please reach out to the Congregational Transitions Director as soon as possible.
6. If interim ministry is recommended and desired, assemble a search team. This team is usually a task force of the board with 3-5 members who are trusted by the full board and can engage in a fast-moving process that plays out in early May. Staff members are not eligible to serve on search teams.
7. To initiate a search profile, email the Congregational Transitions Director, Christine Purcell (cpurcell@uua.org), to provide the name and email address of at least one search team member in or after mid-February. The UUA transitions team will open a search profile for your search team in our MinistrySearch system once that information is received. Here is a link to the MinistrySearch System. Only search team members added to the profile will have access to the profile. The initial contact to whom UUA staff grant system access may add other interim search team members.
8. If your team wants access to your information from a previous search, you may request your congregation's old record sheet(s) by sending an email to transitions@uua.org.
9. **The search team should pay attention to the interim search calendar, as exact dates change a bit from year to year (published on uua.org/transitions) and to all newsletter updates from transitions@uua.org.**
10. While the search team could download the profile questions for work outside of the search system, copying and pasting responses takes time, and frustrating formatting errors are likely. If you decide to work off-line on the questions, you should clear formatting before pasting text into the system. It may be easier to work on the profile in the search system, saving changes as you go, as the search system is stable.
11. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the profile. This is the person search teams ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or** UUA Transitions Team**, not to regional staff.**
12. The search team should have the draft ministerial agreement approved by the board and compile a documents packet (full list below) to be shared with applicants. *A link to the draft ministerial agreement must be included in your search profile.*

13. Complete the profile as best you can. Ideally, input is obtained from at least the entire board of trustees. Some answers may require an educated guess or estimate. Some information will be pre-populated from certification data submitted to the UUA from the congregation. The profile serves your congregation best when you are truthful about your congregation's needs during the interim time. Provide a quick assessment of your strengths and challenges and a snapshot of your congregation and its values. Authenticity and honesty serve you better than putting your best foot forward. Surprises lead to resentment, bad matches, and hard feelings all the way around. You may adjust and modify your application until the deadline.
14. **For the best exposure to potential applicants, search profiles should be ready for publication before the last week of April**.
15. Once the profile is complete, your team should click "complete record" and then "publish." Doing so will push your changes to a version of the document which can be previewed by regional staff. *Let your primary or regional staff contact know that your profile is ready for review.* Your primary contact (or the Congregational Transitions Director) will review your profile for clarity, consistency, and a balanced view of your congregation's unique strengths and challenges. They may offer feedback or request changes before clearing it for publication.
16. Ministers will review all search profiles in the last week of April and decide where to apply.
17. When names of applicants are released to your search team the following week, each member of the search team will receive an automated notification email from the MinistrySearch system when your team has applicants to review. The names and ministerial records of your applicants will appear in the profile when you next log in. It is possible that not every congregation will have applicants, so if you do not see any names when you log in, check in with the UUA Transitions Team to confirm this. Every effort will be made to release the names of all prospective interims available to the search team by 5 p.m. Eastern on the day names are released.

18. A minister's name may be sent to up to 6 congregations for consideration before the first offer date, with preference being given to accredited interim ministers and those with experience and training in interim ministry. The UUA Transitions Team will release the names of all eligible applicants to each search team unless there are more than 6 applicants for your position. If your search team receives the names of 6 applicants, you can be sure that those are the 6 most experienced ministers who applied.

19. Trust is key in this process. The board must trust the team it assembles to make hiring decisions (including ranking applicants and making a verbal offer once matched). Ministers need to be able trust that their identities will be held in confidence by the search team throughout this process. Only search team members listed in the MinistrySearch system should know who your applicants are. The search team can solicit hopes/questions for the interim ministry/minister from staff members and people on the board who are not on the search team and create a shared document for all involved to see. The search team could share *anonymized* information about and responses from applicants in this way.
20. If a minister reaches out to you about your position and seems unwilling to use the MinistrySearch system, please contact your regional staff or the UUA Transitions Team to determine if the minister is eligible to serve.
21. Search teams should fully and fairly consider all applicants, using an inclusive process that honors the unique needs, perspectives, identities, and skills of all search team members and applicants, in alignment with our Unitarian Universalist shared values.
22. The search team should acknowledge each application and send a link (view-only access) to the documents packet so your applicants can learn more about your opportunity while your team learns about them. Documents packet details are below.

23. Everyone on your search team should read each ministerial record in preparation for a discussion about whom your team wants to interview. You may want to interview all your applicants if you have time to do so in the consideration window. Every member of the search team should participate in each interview.
24. To let an applicant minister know, at any point, that your team does not wish to move forward in considering them, you should dismiss them using the MinistrySearch system. The system can send them an automated message, or you can write your own message within the system, as you prefer, once you click “dismiss.”
25. **References and confidentiality**: as the search team moves forward with discernment, team members should keep the identities of applicants confidential both in their own congregation and in the process of learning about applicant ministers. They should only reach out to references provided by the applicant minister. They should NOT, for example, reach out to someone in leadership at the congregation where a minister is serving if that person’s name was not provided as a reference, as that leader may not know the minister is in search. Search teams should not attend live worship led by an applicant on-line or in-person, though they are free to watch recordings which are provided by the applicant or available to the public. Attending live worship can breach confidentiality and may lead to the withdrawal of an applicant who did not consent to this. *Please check in with UUA Transitions Team with any questions about confidentiality.*
26. The search team should ask applicants if there are dealbreakers in the draft contract or any additional expectations applicants would like to share. Doing so maximizes the chance of a smooth negotiation.
27. Check the references your applicants provide to you. You may do this before or after interviews, as you wish. There are advantages to both approaches.
28. You may ask your applicants for additional references if you need more specific information. You may also ask top applicants which UUA regional staff member is most familiar with their ministry. *UUA staff do not provide references for ministers* but would be glad to provide their perspectives on applicants. If you are not sure whom to call on regional staff to learn more about your top applicants, the Congregational Transitions Director can connect you to the right person on her staff team. See this section for information on research calls with UUA staff.
29. Congregational Life staff and the minister(s) currently serving your congregation are likely to be contacted by applicants to learn more about your ministry needs and history. This is appropriate and helpful. A minister currently serving a congregation should not provide applicant-specific information or guidance to the search team.
30. Once you have read ministerial records, checked references, and interviewed applicants, your team should meet to assess and rank your applicants with the priorities for your interim ministry in mind.
31. On or by the date specified on the search calendar, please provide your ranked yes/maybe/no list to the UUA Transitions Team using this form (for search teams). Ministers will do the same using this form.
32. The UUA Transitions Team will figure out the highest-ranking match for everyone and let everyone know what is likely to happen on offer day *before* offer day. For example, if Rev. A and congregation X identify each other as mutual first choices, it is a match! If Rev. B identifies congregation Y as their first choice, and congregations Y and Z both identify Rev. B as their first choice, Rev. B has a match with congregation Y. The UUA Transitions Team would then check for an alignment between congregation Z and their second choice. Occasionally, matches are more complex to determine. Perhaps the UUA Transitions Team will need to have a conversation with a minister or search team about a tie or a potential match identified as a maybe. Search teams should prepare to be responsive to messages from the UUA Transitions Team in the days between the ranking due date and offer day.
33. No offers or hints at offers may be made before offer day (date identified in the search calendar) at noon Eastern time. There is no formal letter of offer; just a call or email to

say that the search team is offering the position to the minister. When the verbal offer is accepted, the minister and board may negotiate any final details of the contract.
34. Search teams may check with all their other applicants after noon Eastern time on offer day if they want to wish the ministers well.
35. As negotiations begin for finalizing the employment agreement, board members may reach out to the Office of Church Staff Finances (comp@uua.org) for assistance. The minister may reach out to a UUMA Good Offices specialist in contract negotiations for assistance.

If no match is found

If a congregation does not have a match on offer day, the search team notifies their board that there is no match in the current search cycle. The UUA Transitions Team is available to offer care, guidance, and perspective at this moment and to debrief with the search team and board. The UUA will convert the interim ministry search to a contract ministry search unless the congregation wishes to withdraw from search (see Contract Ministry Overview section). A contract ministry search in the open search (starting 01 April) has no matching process, offer day, or deadlines; search teams interview applicants until they find the minister they would like to hire. Interim work may still be done with a contract minister, and the training required for interim ministers is open to contract ministers.

Additional materials/documents packet for interim search

The search team should provide all applicants with a link with **view-only access** to an on-line folder which anyone with the link can access (Google Drive, Dropbox, etc.) with:

- Draft ministerial agreement/contract (board-approved) and change log, if changes from the UUA/UUMA model agreement were made and not tracked in the draft agreement itself
- Bylaws
- Covenants or policies around behavior or expectations of congregations (like a safe congregation policy)
- Recent board and annual meeting minutes
- Recent budgets
- Benefits information
- Employer Participation Agreement for the UUA Retirement Plan
- Search team bios
- Anything else leadership wants to share with applicants

Your website is also a source of information for potential applicants. Expect ministers to scour it.

If these documents are already housed on your website, direct the applicants to them and provide the access information needed. If they are not on your website, copies can be placed in a Dropbox or Google Drive (strongly preferred) or shared via email. You may include incentive pieces or links about your area, such as links to your location's Chamber of Commerce, Wikipedia page, housing information, and any tourism sites.

The UUA Transitions Team encourages every minister to have a website or a collection of links to sermon videos ready to share with search teams when they apply. What congregational search teams want more than anything else is to see and experience sermons/worship. A good website for a minister will include:

- a biography including a vision for Unitarian Universalism and your ministry
- sermons (ideally video or with video links)
- other rites of passage services (good but optional)
- newsletter columns (good but optional)
- additional photos and video files are a plus

Offer and background checks

- Please remember that congregations should compensate interim ministers at the same level as you would compensate a called minister. You should plan to pay your interim minister at least at the midpoint of the salary range. Several of our experienced interims can command above midpoint compensation.
- When you make an offer on the final day of the search cycle, the offer is contingent on a successful background check as well as coming to agreement on the specifics of the offer being made.
- While you can use any company you wish to complete a background check we offer:
  - Oxford Document Management Company
  - Church Mutual Insurance Company
- Follow this link to find your congregation's Geo index and salary tables.
- Follow this link to learn more about fair compensation.
- If your current minister is paid below the mid-level recommended guidelines, you should at least maintain or raise the salary to find the best interim possible.
- If your current minister is paid above the mid-level recommended guidelines, you should at least pay the mid-point, unless you are getting an interim with more experience than your current outgoing settled minister. In that case, you should match or raise the compensation.
- You should be prepared to pay full benefits in the compensation package. Please use the Compensation Worksheet.
- The UUA recommended sample interim agreement can be found here and on the Transitions website. Deviating from the recommended contract is discouraged.

If you have questions

- Questions about the interim search should be directed to the UUA Transitions Team.
- Emails are easier for the UUA Transitions Team, but you may request a phone or video call. Send an email to transitions@uua.org with several suggestions of a time for a call and the nature of your questions or concerns.

After the agreement is signed

- When your interim ministry search is archived, you will receive an automated request for someone who is familiar with the compensation details for your search and has a copy of

the signed ministerial agreement to complete this form: https://uua.wufoo.com/forms/notice-of-ministerial-call-or-hire/
- Please be sure we know the start date of the ministry so we can update the online directory for your congregation.

Compensation, benefits, and relocation for interim ministers

Congregations should compensate ministers fairly.

Fairness includes:

- Compensation (salary and housing)
- Benefits (retirement, health, dental, long-term disability, life insurance, half of the minister's self-employment taxes)
- Professional Expenses (greater of 10% of salary and housing or $8,000)
- Relocation costs (~$10,000). Keep in mind that ministers are taxed on relocation expenses.

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

Compensation

Every congregation resides in a Geo index or wage rate area and is of a particular size. Both are factors in expected adequate compensation.

Follow this link to find your Geo index and salary tables.

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

If your leadership and your current (perhaps previous) minister kept their salary/housing lower than fair compensation guidelines suggest (as often happens in congregations where the minister is there for a while), know that you are dealing with a deferred congregational problem, and not the incoming minister's problem. This will also likely affect the settled search unless you begin to offer fair compensation. Simply put, take responsibility for the fact that the minister has been underpaid and work to correct this issue, as soon and as best you can. If this is someone else's problem and not the congregation's, the congregation is less likely to attract the minister it needs.

Your leadership should not reduce the hours or compensation of other religious professionals on staff to pay a minister a higher wage. This would harm the programs of your congregation and could set up the new minister for resentment from the rest of the staff. If your congregation is struggling to afford and sustain fair compensation for all staff, leaders should be in touch with

UU compensation staff (comp@uua.org) or regional staff for guidance in thinking through this challenge.

Benefits

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

If your minister has a benefit covered elsewhere, the money saved should be included in the minister's overall package or set aside in a sabbatical coverage fund for a future settled minister.

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

Professional expenses

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

Follow this link to learn more about professional expenses.

Relocation

This is often very hard on both minister and congregations. Relocation expenses are usually 10% of salary and housing to $10,000 because moving is so expensive. Relocation expenses are now considered taxable income by the US government, so the congregation is encouraged to help offset the additional tax burden. Everyone is encouraged to find ways to help and save.

Any search team 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 UUA Transitions Team 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 UUA Transitions Team for more information.

Interim minister sabbatical fund

The standard UUA/UUMA recommended agreement for interim ministries states: "In recognition and appreciation of the unique work of interim ministry, the Congregation will contribute $1,000 to the UUA Interim Ministry Sabbatical Fund. Such payment will be made to the Office of Church Staff Finances." To make a congregational contribution to this fund, please follow these instructions.

Getting ready for the interim ministry

Interim Ministry Training

If a minister has not served as an interim before, they receive training from the UUA and the Interim Ministry Network in the summer prior to or just after beginning their interim service. The congregation pays for this training as described in the agreement.

Getting ready for the interim ministry/common read

Congregational leaders that prepare themselves for the interim ministry period are more likely to have a successful interim period. We recommend a common read for leaders preparing for the interim ministry like *In the Interim* or *The Spirit That Moves* from our UUA bookstore.

Once the interim ministry begins

The new minister, leadership, and regional staff may plan for a new ministry start-up to help align expectations and begin the early stages of planning for the interim work ahead, if desired. Congregational leaders should be patient as interim ministers do the early work of getting to know the congregational system and building trust and relationships. You have important work to do together! The work is easier once a baseline of trust and care is established.

The Transition Team

Typically, the Committee on Ministry is disbanded by the board or goes on hiatus during the interim ministry and a transitions team (with different members) is formed. Once an interim minister is hired, it is a good practice for them to converse with the board about the traits and connections they would value in members of their transition team. The interim minister appoints, or the board selects, in alignment with the interim minister's preference, a team of people to orient the interim minister to the culture of the congregation and to assist them in planning, carrying out, and assessing some of the special tasks of interim ministry.

In the Interim includes a chapter on transitions teams: A Different Country, by Rev. Judith Walker Riggs.

What happens after the interim ministry?

In most cases, in the last year of the interim ministry, the congregation conducts a settled ministry search. Some congregations pivot to a developmental ministry search, if their leaders, UUA regional staff, the interim minister, and UUA Transitions Team see that the congregation has significant cultural and structural change work to do before beginning an open-ended ministry partnership. Others may choose a contract ministry search as the best way forward. See the relevant section of this handbook for guidance on these types of ministry search.

For ministers considering or practicing interim ministry

Interim ministry is not settled ministry. Interim ministry has evolved from a place where a congregation got an interim minister as a placeholder while they searched for their next settled minister. Interim ministry should not be perceived as something an interim minister does to a congregation.

Interim ministry is a collaboration between congregational leaders, staff, and the interim minister to help the congregation move forward toward a new future. Interim ministers must be prepared to work with congregations in various stages of grief, readiness, and receptivity to this ministry to be successful at it.

Ministers considering interim ministry are encouraged to read In the Interim and to reach out to colleagues currently engaged in interim ministry for even more information and discernment. The UUA's transitional ministry training (in partnership with the Interim Ministry Network) is not required to apply for interim ministry. It will be expected once a minister begins an interim ministry.

The process for ministers wanting to apply to do interim ministry

1. Alert the UUA Transitions Team of your interest in interim ministry
2. Complete your Ministerial Record in the MinistrySearch system
3. The UUA Transitions Team encourages every minister to have a website or a collection of links to sermon videos ready to share with search teams when they apply. What congregational search teams want more than anything else is to see and experience sermons/worship. A good website for a minister will include:
    - a biography including a vision for Unitarian Universalism and your ministry
    - sermons (ideally video or with video links)
    - other rites of passage services (good but optional)
    - newsletter columns (good but optional)
    - additional photos and video files are a plus
4. Once your materials are complete, you may express interest in MinistrySearch for interim congregations. You should also email a list to the UUA Transitions Team of your order preference (for the first round of interim search) as congregations and ministers are limited to the number of applications that can be received or sent.
5. Have references available immediately. We are encouraging in interim search that congregations contact references before video interviews.
6. You are free to reach out to colleagues who serve or have served the congregations you are interested in for more information.

7. We ask all searching ministers and interim search teams to provide the UUA Transitions Team with rankings at least 48 hours before the offer date. The UUA Transitions Team will confirm all lists and share what is likely to happen on offer date with each search team and minister. Please submit your rankings using this form.

When the offer date and time comes, the minister may accept an offer to do interim ministry. Contract negotiations may begin as soon as the offer is accepted. Ministers may hear from other search teams who will call to wish them well in their search. We recommend ministers not initiate communications with search teams but let the search teams come to them.

Year-long Transitional Ministry Training (in partnership with the interim Ministry Network)

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

Becoming an Accredited Interim Minister

To become an Accredited Interim Minister first requires one year as an interim minister, followed by an application and acceptance as an Accredited Interim Minister in Training (AIMIT). Once an AIMIT completes the requirements, they may then apply for acceptance as an Accredited Interim Minister (AIM). This section provides information for the AIMIT and AIM applications.

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

- Be in Full Fellowship with the UUA (however, ministers in preliminary fellowship may be admitted on a case-by-case basis).
- Demonstrate competence in worship, preaching, counseling, working with volunteers, and church administration.
- Demonstrate a proven willingness to seek, illuminate, and create opportunities for the full integration of people with historically and currently marginalized identities into all aspects of congregational life, and to dismantle white supremacist culture.
- Have completed the Interim Ministry Network's New to Transitional Ministry training, offered each year by the Transitions Office.
- Have served effectively as an interim minister for at least one full current year.
- Exhibit appropriate personal qualities:
    - self-differentiation: personal security, emotional stability, flexibility
    - resilience and resourcefulness
    - comfort with beginnings and endings.
    - the ability to listen attentively and to ask searching questions.
    - patience, empathy, understanding.
    - hopefulness: a positive approach to life
    - physical vitality
    - entrepreneurial energy on behalf of congregations; and
    - a domestic situation conducive to frequent relocation.
- Make required professional commitments.
- Retain an AIM as a mentor, and to engage in regular conversation about interim ministry with the mentor at least monthly.

Instructions to apply for Accredited Interim Minister in Training (AIMIT) status

Application Deadline: February 1

To apply for AIMIT status, an application is required with supporting materials no later than February 1. Evaluation of your application will be conducted by the UUMA Transition Ministry Chapter Executive and the UUA Transitions Team. If your application is accepted, you must attend the UUMA Transition Ministry "Transitional Ministry Seminar" held in April, after which a final determination will be made whether you are granted AIMIT status. You will be notified of the decision by email from the UUA Transitions team following the Seminar.

Applying
The application and all supporting materials should be submitted electronically together (as email attachments) and must include the following:

- The AIMIT application submitted electronically here (see below to preview questions asked).
- Name of congregation you are currently serving as an interim minister (and have completed one year).
- The name of a regional staff person with whom you have worked.
- A letter from your mentor evaluating your potential for interim ministry.
- Copies of at least one year of interim appraisals from you and the congregation. (If you have served more than one year as interim, please include up to three years of appraisals. If you cannot provide these, the Transitions Office will attempt to locate copies. Our filing system is challenging so please allow several weeks' lead time when requesting copies of appraisals.)
- A copy of your up-to-date Ministerial Record from the UUA MinistrySearch system (as a PDF).
- A link to your website or an electronic version of your packet
- A copy of your certificate of completion of the *Fundamentals of Transitional Ministry: The Work of the Congregation (FTMC)* including fieldwork (either through the UUA-sponsored *Year-long Transitions Ministry Training*/*New to Transitions Ministry Training*, OR the Interim Ministry Network's class).

Preview of "Application for AIMIT Status"

(Apply here)

1. Today's Date
2. Name
3. Email
4. Preferred Phone
5. Mentor's Name
6. Mentor's Email
7. How long as mentor?
8. Does mentor have interim ministry experience?
9. Please list other mentors you have had and length of time as mentor.
10. Regional Staff Name
11. Please explain why you are interested in AIMIT status at this time.

12. Please explain why you feel called to interim ministry work and express any reservations you may have about the suitability of interim work for your ministry.
13. Is there any other information you would like to share?

Instructions to apply for Accredited Interim Minister (AIM) status

To apply for AIM status, an application is required with supporting materials no later than February 1. Applications will be considered after February 1. Evaluation of your application will include a review of your UUA file by the Transitions Office, and discussion will be conducted by the Transitions Office, your mentor, and another AIM chosen by your mentor. A decision will be sent to you via email from the Transitions Office by March 15.

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

- The AIM application submitted electronically (see below to preview questions asked).
- A letter from your regional staff person you have worked with, evaluating your experience as an interim minister.
- Copies of interim appraisals by you and the congregations served for the most recent three years of interim ministry. (If you cannot provide these, the Transitions Office will attempt to locate copies. Please allow several weeks lead time when requesting copies of appraisals.)
- A copy of your up-to-date Ministerial Record (as a PDF) from the MinistrySearch System.
- A link to your website or an electronic copy of your interim search packet.
- A copy of your certificate of completion of the Fundamentals of Transitional Ministry: The Work of the Congregation (FTMC) including fieldwork (either through the UUA-sponsored *Yearlong Transitions Ministry Training*/*New to Transitions Ministry Training*, OR the Interim Ministry Network's class.)

Preview of "Application for AIM Status"

1. Today's Date
2. Name
3. Email
4. Preferred Phone
5. Mentor's Name
6. Mentor's Email
7. How long as mentor?
8. Does mentor have interim ministry experience?
9. Please list other mentors you have had and length of time as mentor.
10. Regional Staff Name/Email
11. Dates of AIM seminars attended
12. Interim Training Completion Dates
13. Explain why you are interested in AIM status and what you bring to Accredited Interim Ministry. In your statement, please address how your recent ministries have demonstrated success in assisting congregations in the tasks of interim ministry.
14. Is there any other information you would like to share?

Interim progress appraisals

Overview

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

The appraisals should be approached as a conversation between leaders and the interim, offering a valuable opportunity to reflect on the progress of the interim ministry as it unfolds. The UUA Transitions Team likes to have copies of the appraisals to learn about the congregation's readiness for settled ministry and to see how self-reflective and open the interim minister and congregation are as they move forward. They are not meant as an evaluation of the interim minister.

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

Cycles

For a 24-month interim ministry

The appraisals are due:

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

For a 12-month interim ministry

The appraisals are due:

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

For interim ministries beyond 24 months

The appraisals are due:

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

Sample appraisals for interim ministry

There are three Appraisal forms. Click this link to download a Word version of the appropriate appraisal:

Six-Month
Annual
Final

Interim appraisals must be completed independently by both the congregation and the interim minister and then shared when completed. Appraisals are required after the first six months, after a year (12 months), and the Final Appraisal at the conclusion of the second year of a two-year interim ministry. For a three-year interim, an additional annual appraisal is required at the end of the second year and a Final Appraisal at the conclusion of the third year. All appraisals should be completed and submitted within 45 days as an email attachment to transitions@uua.org.

Developmental Ministry Overview

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

Good candidates are:

- congregations which want to work on significant structural or cultural change work before calling another minister. There may be positive and creative reasons for seeking a long-term transitional ministry partner, such as moving into a new governance structure, improving the congregation's visitor to leader pipeline, or creating a culture of welcome, inclusion, or generosity, etc.
- congregations with a traumatic history of unresolved conflict, boundary violations, clergy (or other staff or leader) sexual misconduct, repeated and rapid ministerial turnover, abusive leadership.
- congregations with longtime, unresolved struggles, such as over a historic and beloved building.
- congregations where their community has changed, sometimes facing a decline, when the congregation may need to reinvent itself and its purpose.

In an optimal developmental ministry setting, congregational leaders are unified that goal-based work needs to occur, can readily identify areas of work needed, and realize that they must do this work with help from a minister (and, not have the minister do the work for them). They realize that the work may be challenging, as it may be related to trust, power, authority, identity, and right relationship. They realize that sustained work will be needed; this is not a quick fix. They have found a way to ensure buy-in from the larger congregation. New leaders are oriented to and supportive of the program when leadership turnover occurs.

When it works:

- When the congregation identifies significant cultural or structural change work it wants to do or wants to make a breakthrough in addressing chronic issues. The congregation has worked with the regional staff and/or current minister (usually an interim minister) to see the need and capacity for significant learning and change.

When it doesn't work:

- When the congregation is not serious about or committed to working on its goals.
- When the congregational buy-in for this type of ministry has not been established.
- When the congregation expects the minister to do all the work.

Notes:

- Congregational Life staff must approve this type of ministry search for congregations.

- Congregational Life staff must approve applicants for this type of search based on their alignment with the needs of the congregation. For developmental ministries, UUA staff seeks applicants with experience, a track record of success or skills in the type of work the congregation wants to do, and an approach to ministry partnership which could align well with the congregation.
- The developmental minister is not there to fix the congregation. The developmental minister is there to assist the congregation in achieving its goals.
- **The developmental minister may not be called.** Developmental ministry precedes the search for a called minister, usually.
- Congregations seeking a part-time minister and those with fewer than 125 members use the contract ministry search process. A contract ministry with a developmental ministry focus is possible. The transitional ministry training which interim and developmental ministers receive from the UUA and Interim Ministry Network is open to contract ministers.
- **There is no additional cost associated with developmental ministry for congregations which support our UUA's Annual Program Fund (APF) at the Honor level.** Because of the congregation's increased partnership with UUA staff and the need for additional support and continuing education for the developmental minister, congregations with developmental ministries which begin in or after August of 2025 which do not support the APF at the Honor level agree to pay the UUA $1,000 during the first and second years of developmental ministry.

Ministerial pool available:

- Intentionally small. Often UUA Transitions Team and Congregational Life staff actively recruit specific, experienced ministers to meet the congregation's stated goals. The overall pool of ministers interested in this, while growing, is smaller than interim or settled ministers.

For more information:

- Read Nancy Bowen's chapter "Options for Ministerial Transition Other Than Interim Ministry" in the 2nd Edition of *In the Interim.*
- Read this article about one developmental congregation
- Question and answer article from UU World
- Talk with your regional staff person

The developmental ministry search process

1. Leadership should research developmental ministry is and discuss whether it is a good fit for their needs.
2. Board members should check the bylaws to see what they say about hiring transitional ministers. If they do not align with the process below, please contact the Congregational Transitions Director.
3. Leadership should engage with regional staff and their interim minister (if they have an interim minister) about whether developmental ministry might be beneficial. *Congregational Life staff must approve this type of ministry search.*
4. Leadership should engage the congregation in reasons for considering developmental ministry and find ways to generate congregational buy-in. Listen well and communicate broadly.
5. Leadership should agree on appropriate and significant developmental ministry goals with the help of regional staff.
6. Once the decision to pursue developmental ministry is made and approved, leadership should assemble a search team of 3-5 people. This is a task-force of the board and comprises mainly (or exclusively) board members. They should be trusted and empowered to make a hiring decision.
7. The UUA Transitions Team opens developmental ministry search profiles in the MinistrySearch System on **01 December**. Reach out to the Congregational Transitions Director on or after that day to have your profile initiated.
8. **Board and search team members may contact Christine Purcell, Congregational Transitions Director, at any time during the transitional period for support.** She holds open office hours each week on Zoom for those in transitional ministry searches on Tuesdays from 3:00-5:00 PM Eastern time: https://uua.zoom.us/j/95425414067
9. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the profile. This is the person search teams ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or** UUA Transitions Team, **not to regional staff.**
10. The search team should prepare a draft contract/agreement (using the template provided by the UUA), have the draft agreement approved by the board, and compile a documents packet (full list below) to be shared with applicants. A link to the draft employment agreement is included in the search profile; the other documents can be shared with ministers later, once they apply.
11. While the search team could download the profile questions for work outside of the search system, copying and pasting responses takes time, and frustrating formatting errors are likely. If you decide to work off-line on the questions, you should clear formatting before pasting text into the system. It may be easier to work on the profile in the search system, saving changes as you go, as the search system is stable.
12. The search team should complete the profile and have it reviewed by regional staff in time to make any final changes before publication day: **31 January**.
13. Ministers have until **02 March** to apply by submitting their ministerial record through the search system.
14. The Congregational Transitions Director discusses potential applicants with regional UUA staff. UUA Transitions Team members make sure applicants have the experience search teams seek before confirming the list of applicants. For example, someone who is new to ministry may not be selected to apply for developmental ministry positions

unless they have considerable experience outside of ministry in the type of work the congregation plans to engage.

15. The names and ministerial records of applicants are released to search teams on **06 March**.
16. If a minister reaches out to you about your position and seems unwilling to use the MinistrySearch system, please contact your regional staff or the UUA Transitions Team to determine if the minister is eligible to serve.
17. Search teams should fully and fairly consider all applicants, using an inclusive process that honors the unique needs, perspectives, identities, and skills of all search team members and applicants, in alignment with our Unitarian Universalist values.
18. The search team should review all ministerial records and materials submitted by applicants, decide whom to interview, conduct virtual interviews, check references provided by applicants, and talk with regional staff about applicants as part of their discernment work (see information on research calls below). Each member of the search team should participate in all interviews.
19. **References and confidentiality**: as the search team moves forward with discernment, the search team should keep the identities of applicants confidential both in their own congregation and in the process of learning about applicant ministers. They should only reach out to references provided by the applicant minister. They should NOT, for example, reach out to someone in leadership at the congregation where a minister is serving if that person's name was not provided as a reference, as that leader may not know the minister is in search.
20. Search teams should not attend live worship led by an applicant on-line or in-person, though they are free to watch recordings which are provided by the applicant or available to the public. Attending live worship can breach confidentiality and may lead to the withdrawal of an applicant who did not consent to this. *Please check in with UUA transitions staff with any questions about confidentiality.*
21. The search team should provide a ranked list of applicants to the UUA Transitions Team on or by **23 March.** Ministers will do the same. Search teams should use this form to share rankings; ministers should use this form.
22. The UUA Transitions Team will figure out the highest-ranking match for everyone and let everyone know what is likely to happen on offer day *before* offer day. For example, if Rev. A and congregation X identify each other as mutual first choices, it is a match! If Rev. B identifies congregation Y as their first choice, and congregations Y and Z both identify Rev. B as their first choice, Rev. B has a match with congregation Y. The UUA Transitions Team would then check for an alignment between congregation Z and their second choice. Occasionally, matches are more complex to determine. Perhaps the UUA Transitions Team will need to have a conversation with a minister or search team about a tie or a potential match identified as a maybe. Search teams should prepare to be responsive to messages from the UUA Transitions Team in the days between the ranking due date and offer day.
23. No offers or hints at offers may be made before offer day at noon Eastern time. There is no formal letter of offer; just a call or email to say that the search team is offering the position to the minister. When the offer is accepted, the minister and board may negotiate any final details of the contract.
24. Offer day: **26 March at noon Eastern**.
25. Search teams may check in with all their other applicants if they confirm their responses and wish ministers well.
26. As negotiations begin for finalizing the employment agreement, board members may reach out to the UUA Church Staff Finances staff (comp@uua.org) for assistance. The minister may reach out to a UUMA Good Offices specialist in contract negotiations for assistance.

Compensation, benefits, and relocation for developmental ministers

Congregations should compensate ministers fairly.

Fairness includes:

- Compensation (salary and housing)
- Benefits (retirement, health, dental, long-term disability, life insurance, half of the minister's self-employment taxes)
- Professional Expenses (greater of 10% of salary and housing or $8,000)
- Relocation costs (~$10,000). Keep in mind that ministers are taxed on relocation expenses.

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

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

Follow this link to find your Geo index and salary tables.

The UUA recommended sample developmental ministry agreement can be found here and on the Transitions website. Deviating from the recommended contract is discouraged. You may track changes in the document or log changes in a separate document as you prepare the draft agreement.

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

If your leadership and your current (or perhaps previous) minister kept their salary/housing lower than fair compensation guidelines suggest (as often happens in congregations where the minister is there for a while), know that you are dealing with a deferred congregational problem, and not the incoming minister's problem. This is likely to affect the search unless you begin to offer fair compensation, as fewer ministers will apply. Simply put, take responsibility for the fact that the minister has been underpaid and work to correct the issue, as soon and as well as you can.

Your leadership should not reduce the hours or compensation of other religious professionals on staff to pay a minister a higher wage. This would harm the programs of your congregation and could set up the new minister for resentment from the rest of the staff. If your congregation is struggling to afford and sustain fair compensation for all staff, leaders should be in touch with a compensation consultant or regional staff for guidance in thinking through this challenge.

Benefits

Every minister deserves benefits. All of them. Your minister has at least a master's degree and may have other people who depend on them financially. You should be prepared to pay full benefits in the compensation package. Please use the Compensation Worksheet to determine the total cost of ministry.

If you have saved money on benefits, for one reason or another (like the minister's spouse providing health insurance), or if you can (because the interim tells you their health care is provided for), the congregation should make sure that money is conserved and available for future ministries. If your minister has something covered elsewhere, then the money saved should be included in the minister's overall package or set aside in a sabbatical coverage fund for a future settled minister.

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

Professional Expenses

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

Follow this link to learn more about professional expenses.

Separate from professional expenses, we strongly encourage every developmental minister to have additional money set aside for transitional ministry training.

Relocation

This is often very hard on both minister and congregations. Relocation expenses are usually 10% of salary and housing up to $10,000 because moving is expensive. Relocation expenses are now considered taxable income by the US government, so the congregation is encouraged to help offset the additional tax burden. Everyone is encouraged to find ways to help and save.

Any search team 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 UUA Transitions Team 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 UUA Transitions Team for more information.

- Please remember that congregations should compensate developmental ministers at the same level as a called minister. You should plan to pay your developmental minister at least at the midpoint of the salary range. Several of our experienced ministers can command above midpoint compensation.
- Follow this link to find your congregation's Geo index and salary tables.
- Follow this link to learn more about fair compensation.
- If your current minister is paid below the mid-level recommended guidelines, you should at least maintain or raise the salary to find the best minister possible.

- If your current minister is paid above the mid-level recommended guidelines, you should at least pay the mid-point, unless you are getting a developmental minister with more experience than your current, outgoing minister. In that case, you should match or raise the compensation.

Additional materials/packet for developmental ministry search

Your website is a source of information for potential applicants. Expect ministers to scour it. You should also provide a packet of information to your applicants via a link to an on-line folder which anyone can view. This folder should include:

- the draft ministerial agreement (board-approved) and change log, if changes from the UUA/UUMA model agreement were made and not tracked in the draft agreement itself
- Bylaws
- a congregational budget (multiple years are even more appreciated)
- a copy of the by-laws
- covenants or policies around behavior or expectations of congregations (like a safe congregation policy)
- a couple of different orders of service
- several newsletters (links are fine)
- recent board minutes
- search team bios

If these are already housed on your website, direct the applicants to them and provide the access information needed. If they are not on your website, copies can be placed in a Dropbox or Google Drive (strongly preferred) or shared via email. You may include incentive pieces or links about your area, such as links to your location's Chamber of Commerce, Wikipedia page, housing information, and any tourism sites.

The UUA Transitions Team encourages every minister to have a website or a collection of links to sermon videos ready to share with search teams when they apply. What congregational search teams want more than anything else is to see and experience sermons/worship. A good website for a minister will include:

- a biography including a vision for Unitarian Universalism and your ministry
- sermons (ideally video or with video links)
- other rites of passage services (good but optional)
- newsletter columns (good but optional)
- additional photos and video files are a plus

Developmental ministry search covenants

On behalf of congregational boards, search teams enter into covenant using the checkbox in their search profile in the MinistrySearch system. Applicant ministers do the same in their search profiles. Participation in interim search requires agreeing to and following the covenant (see covenant section).

Research calls with UUA staff

The search team should set up research calls with UUA regional staff (or CUC, if Canadian) to learn more about their top applicants. **These are not reference calls, as denominational staff do not provide references for ministers.** Regional staff are keen to share what they know about pre-candidate ministers to help your search team find a great match.

The search team should ask each top applicant minister which UUA regional staff person knows their ministry best. If the minister cannot connect the search team with a regional staff person, the search team may reach out to the Congregational Transitions Director to ask if anyone on staff is familiar with the ministry of the applicant.

Research calls are part of the due diligence of the search team. They are one of the main ways the UUA shares information about ministers with search teams. There is value in confirming the perception your team has formed about your top applicants…or in hearing stories which challenge those perceptions. Ministers and ministries are multi-faceted and cannot be reduced to a single narrative. The view of someone on regional staff can be somewhat limited, and forms only one piece of the puzzle. You may receive a great deal of information from research calls, or you may simply hear, “I have no red flags about this minister for your ministry opportunity.” You may leave the call with ideas about new references to request or questions to ask of your applicant, or you may simply feel more confident in your team’s perceptions of an applicant. Soliciting more perspectives will help your search team select a good match for your congregation.

Before asking questions of the regional staff person, please plan to share a bit about your congregation’s culture, needs, and context, especially if they are not familiar with your ministry.

Sample questions:

- How do you know our applicant? Have you worked with them directly? In what timeframe?
- These are the goals for the next ministry partnership our congregation has identified: [list goals, or ministerial qualities or skills]. How do you see this applicant aligning with these goals?
- Should we know about any other great qualities or growing edges?
- Do you have any concerns about their ministry, especially given what we have shared about our congregation? *Please note that if you learn something which surprises or disappoints you from regional staff, your team has not made a mistake in evaluating an applicant as a potential match for your congregation. You may hear about behaviors or patterns that could cause concern or make a minister a poor choice for your congregation which do not rise to the level of misconduct, but about which your search team should be aware. Some examples: authoritarian management or communication style, resistance to accountability, poor boundaries, conflict avoidance or lack of skill in conflict transformation. You may also hear about the work a minister tried to do in a congregation which was not receptive to their efforts.*

- Can you think of a type of developed reference we should be sure to ask this applicant to provide? *This could be someone who could speak to the applicant's approach to a particular element of ministry (worship, pastoral care, promotion of inclusivity, administrative functions, etc.).*
- Are there others on UUA regional staff we should contact?

If no match is found

If a congregation does not have a match on offer day, the search team notifies their board that there is no match in the current search cycle. The UUA Transitions Team is available to offer care, guidance, and perspective at this moment and to debrief with the search team and board. The UUA will convert the developmental ministry search to a contract ministry search unless the congregation wishes to withdraw from search (see Contract Ministry Overview section). A contract ministry search has no matching process, offer day, or deadlines; search teams interview applicants until they find the one they would like to hire. Developmental work toward the congregation's goals may still be done with a contract minister.

Offers and background checks

- When you make a verbal offer, the offer is contingent on a successful background check as well as coming to agreement on the specifics of the offer being made.
- While you can use any company you wish to complete a background check, here are some options:
    - Oxford Document Management Company
    - Church Mutual Insurance Company

After the Agreement is Signed

- Board leadership or a staff person familiar with the terms of the finalized contract should complete the Notice of Call of Hire to update UUA records on the new ministry.
- Please also be sure we know the start date of the ministry so we can update the online directory for your congregation.

Once the developmental ministry begins

The new minister, leadership, and regional staff should plan for a new ministry start-up to help align expectations and begin the early stages of planning for the developmental work ahead. Congregational leaders should be patient as developmental ministers do the early work of getting to know the congregational system and building trust and relationships. You have important work to do together! The work is easier once a baseline of trust and care is established.

What Happens After the Developmental Ministry?

In most cases, in the last year of the developmental ministry, the congregation conducts a settled ministry search (see The Settled Ministry Search section).

For Ministers interested in Developmental Ministry

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

The developmental minister understands that

- The work is the congregation's work to do and not the minister's work.
- Systemic issues are often at play.
- The congregation may be at a low point of self-esteem, and this will play out in many ways.
- They will need outside resources to adequately minister to the congregation
- They will work closely with UUA regional staff if hired.
- They will commit for a 4-7-year period, but be open to re-evaluation each year, which they will do with congregational leadership
- They will attend the UUA Year-long Transitional Ministry Training (YLTMT) if they have not previously completed it or both trainings from the Interim Ministry Network.
- They need to be patient and self-differentiated.
- They are not eligible to be called.

Please reach out to the UUA regional staff person who is the primary contact for congregations where you might be interested in applying to learn more about the opportunity and give the regional staff the information they need to determine whether there is a good alignment between the congregation's needs and your skills/interests. Their contact information is included in the search profile.

If you would like support for your search process, please contact Rev. Patrice Curtis, Transformational Interim Ministries Director, pcurtis@uua.org.

Developmental ministry evaluation

This is an evaluation of the combined efforts of the congregation and minister in its developmental ministry. The form is to be completed by the board together with the developmental minister. A final copy should be sent to board members, minister, and UUA Transitions Team (email transitions@uua.org). Please use narrative form to evaluate. This form may be submitted electronically here.

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

Today's Date

Full name of congregation

Congregation city and state/province

Name of developmental minister

Email of developmental minister

Name of person completing form

Role of person completing form

Email of person completing form

List names and roles of participants

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

Contract Ministry Overview

In a contract ministry, a congregation and minister make agreements for ministerial service with a term-limited, potentially renewable contract. It is the only type of ministry search available for part-time positions, though contract searches may be for full-time positions, too. Any ministry position which is not full time is considered a contract ministry by the UUA Transitions Team for search purposes.

Contract ministry searches are for second ministry positions (assistant ministers), part-time ministers, and for congregations seeking a solo minister (full- or part-time). A congregational call is still possible with a solo contract minister, even one who is serving part-time (see the contract-to-call process in this handbook).

Contract ministry is not a lesser form of ministry partnership. The contract ministry search process is simply a flexible and accessible path to ministry partnership. Most contract ministries are indistinguishable in scope and quality from other types of ministries.

Note for small congregations: About a decade ago, the UUA transitions Team noticed that congregations with fewer than 125 members had few (and sometimes no) applicants in interim, developmental, and settled ministry searches. **The UUA now exclusively recommends the contract ministry search process for small congregations.** A contract search works well for small congregations because it moves more slowly, costs less, and requires less volunteer time and energy than, for example, the settled ministry search process. Contract ministers, even those serving part-time, are eligible to participate in the UUA's annual training for transitional ministers (previously restricted to interim ministers) and can work with your congregation on interim or developmental ministry tasks. They may be called by the congregation after a couple of years of good ministry partnership, if doing so is desirable to leadership, the minister, and the congregation (see the contract to call section in this handbook).

Contract ministries agreements are often for one year. These agreements may be renewed. There should be no expectations by the congregation or the minister that the ministry will last longer than the term identified in the employment agreement. Congregations which hope to call the contract minister in the future or those with goals which would be best approached with a longer-term ministry partnership should consider offering a 2-3+ year initial contract. There is low risk to the congregation or minister in doing so since our employment agreements include clear terms for ending a ministry partnership earlier, should the need arise.

The process for finding a contract minister is simpler than a settled ministry search. Finding a contract minister sometimes takes longer than congregational leaders might wish, depending on factors such as timing of the search in the annual search cycle, geography, and compensation/ percentage of time.

There is not a discrete pool of contract ministers. Ministers apply across types of ministry search for the positions which interest them. Their main considerations tend to be compensation and geographical preferences/needs, not the form of the search or employment agreement.

Contract ministry considerations

When it works:

- The congregation is seeking less than full time ministry or has fewer than 125 members.
- The congregation wants a streamlined search process and to be in ministry partnership for a while before considering calling a minister.
- The congregation needs to rebuild trust in the ministry and a ministry with a defined term is needed.

When it doesn't work:

- When expectations do not match what is stated in the search profile or contract.
- When the minister works more than the allotted time contracted with the congregation (working full-time at half-time compensation).
- When the congregation is intentionally avoiding needed interim work.

Reminders:

- The more specific the contract is, the better. Clarity helps manage expectations.
- Contracts may be renewed.
- A contract minister may be called (see relevant section of this handbook). If your congregation hopes to move from contract to called ministry with its next ministry partner, you may want to offer a 2–3-year agreement.

Ministerial Pool Available:

- Small, especially outside of major metropolitan areas, and/or if part-time. Often, the available contract ministers are local. Offering relocation expense reimbursement may help widen the search.

Part-time Positions

Most workers in our congregations (including ministers) are employees, not independent contractors, even if they are part-time with limited responsibilities. See this Employee or Independent Contractor page and contact comp@uua.org with any questions.

Congregations should not expect full-time work for part-time pay. Talk with your applicants about equitable and mutually agreeable ways to structure a part time arrangement. Example: a minister working at 75% could work three weeks on and one week off. A minister working at 50% could work every other week.

The UUA provides a reference for the number of Sundays a minister would expect to lead Sunday services. A full-time minister is in the pulpit 30-35 Sundays a year. You may apply the percentage of time for the position to that range to determine the number of Sundays for your part-time position.

Search process for contract ministries

Contract ministry searches occur within the MinistrySearch system, which will allow your search team to review the ministerial records of interested ministers. Using the MinistrySearch system will require your search team to complete a profile in our system with questions about your unique ministry context. The contract search process is more flexible, sometimes faster, easier on volunteers, and less expensive than the settled search process.

For the 2026 search cycle, we will have two contract search cycles available. Given the high number of contract searches in 2025, we heard from ministers and search teams alike that there was confusion about when to make and accept offers when applicants had applied for both contract and settled ministry positions (an extremely common scenario). For this reason, we will have a Primetime Contract search cycle, which is timed to the settled ministry search, and an Open Contract search, which is timed to the interim search cycle and beyond. There will be more rules and waypoints for the Primetime search cycle to maximize fairness, clarity, and odds of matching, and to reduce confusion.

Timing of contract searches:

Ministers, in general, search each year between December and May for positions which will begin on 01 August. Search teams will have a larger pool of potential applicants when they post a contract search profile during the Primetime search, early in this window. If a congregation needs to find a new minister in the fall, it may be better served by a short-term contract with a minister so the contract ministry search will align with the main search cycle (see Short-term Contract Ministry and Sabbatical Coverage section in this handbook). Reaching out to your Congregational Life staff member or the Congregational Transitions Director can help you determine how best to proceed.

- **Primetime**: for the Primetime search, a search team should be prepared to publish their search profile between 02 December and 15 February. They may evaluate and interview applicants through the third week of March. They will submit a ranking of their applicants to the UUA Transitions Team on 23 March 2026. They will learn about their match on the 24th or 25th of March and make a verbal offer to their match on offer day, 26 March.
- **Open**: for the Open search, a search team should be prepared to publish their search profile any time after 01 April. They may evaluate and interview applicants and make an offer to their top applicant at will. This type of search remains open until a hire is made or until the search team asks to close the profile.

Here is the calendar for both of the 2026 contract ministry search cycles.

Types of contract search:

- Sometimes a congregation is unsure about ministry and/or how much of it they need or can sustain financially. The congregation decides to contract with a minister for a year or more, with the option to renew as the contract ends. **This is Flex Contract ministry.** The congregation sometimes has very specific duties for the minister, especially in part-time ministries.

- Sometimes the congregation is coming out of a settled ministry, or out of a contract ministry that lasted three or more years. The congregation may or may not first try to find an interim minister, but the board realizes that the congregation needs to do grapple with big change, as they transition from one minister to another. **This is Transitional Contract ministry and may not lead to a call.**

- Sometimes the congregation hopes to call a minister and uses this ministry as a test period—to see whether the shared ministry is good, and to provide ministry while the congregation assesses its needs. A contract minister may be called after a couple of years of ministry partnership, if there is a desire to do this which is shared by the minister and the congregation (see process for doing so in the Contract to Call section of this handbook). **This is Contract to Call ministry.**

Contract ministry search covenants

On behalf of congregational boards, search teams enter into covenant using the checkbox in their search profile in the MinistrySearch system. Applicant ministers do the same in their search profiles. Participation in interim search requires agreeing to and following the covenant (see covenant section).

The search process:

1. Check your bylaws to see what they say about hiring transitional ministers. If they do not align with the process below, please contact the Congregational Transitions Director.
2. **Board and search team members may contact Christine Purcell, Congregational Transitions Director, at any time during the transitional period for support**: cpurcell@uua.org. She holds open office hours each week on Zoom for those in transitional ministry searches on Tuesdays from 3:00-5:00 PM Eastern time: https://uua.zoom.us/j/95425414067
3. Since the board hires a contract minister, the board assembles the search team for a contract minister. The search team often has several board members on it. The board should choose search team members who understand the congregation's ministry needs and context, are trusted in the congregation, work well with others, and do not have a personal or controlling agenda.
4. The board should charge the search team with its work. The board should determine and let the search team know which responsibilities lie with the board and with the search team. For example, will the board review the congregation's search profile before publication? Who makes the verbal offer to the top choice applicant, the board or the search team? If the search team cannot make the final decision on the candidate, what will the board need to consider the candidate identified by the search team?
5. Even though formal surveys and focus groups are not required for a contract ministry search, leadership should spend some time listening to the needs and hopes of the congregation before a contract search, especially if trust is an issue in the congregation or if the congregation hopes to find a contract minister who could be a good match for a later call. The Congregational Transitions Director can provide coaching on strategies for finding a good match and a congregational assessment template which could be adapted for a contract ministry search. Small group meetings where some questions like

the following are explored will increase trust, buy-in, and momentum for the search process:

- Why did you come to our congregation?
- Why do you stay?
- In the last ministry, I wish our congregation had more _____
- In the last ministry, I wish our congregation had less _____
- What do you hope never changes in our congregation?
- What do you think could be improved with fresh perspective and energy?

6. If leaders want to discuss what they learn from such conversations, they should feel free to contact regional staff. Questions like these provide valuable guidance to the search team as it presents the congregation to potential applicants and discerns the best choice of the ministers who apply for the position.
7. The board should prepare the minister's draft agreement and let the search team know the minimum amount they expect to pay for the position. Our UUA website has comprehensive information on ministers' salary and benefits (Compensation Standards and Resources). UUA compensation guidance is available to help the board navigate decisions about compensation and benefits, as well: comp@uua.org.

    - Contract ministry agreement template
    - UUA geo index listings and salary tables
    - Guide to UUA Salary Recommendations
    - Benefits, Compensation, and Aid Funds (note: some benefits are required)

8. **Once the search team is in place, the board president should complete this form to initiate the contract search profile in the MinistrySearch System, the on-line portal where searching ministers and congregations connect.** Note: congregations which support the UUA's Annual Program Fund (APF) at the Honor level will be able to use the search system without an additional charge. We acknowledge with gratitude that their faithful support funds our work fully and fairly already. Congregations in search in the 2026 search cycle and beyond which do NOT support the APF at the Honor level, will pay a one-time $500 fee for search support and system use.
9. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the search profile. This is the person search teams ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or UUA Transitions Team, not to regional staff.**
10. While search team could download the profile questions for work outside of the search system, copying and pasting responses takes time, and frustrating formatting errors are likely. If you decide to work off-line on the questions, you should clear formatting before pasting text into the system. It may be easier to work on the profile in the search system, saving changes as you go, as the search system is stable.
11. Per Ministerial Fellowship Committee rules, UUA Transitions Team policy, and ministers' covenant with one another for fair search process, if you have an inside candidate for your position, your search team must make an up or down decision on this candidate before publishing the search profile for the review of potential external applicants. An inside candidate is someone on staff in or affiliated with the congregation or, in the case of full-time ministry searches, someone who has visited the congregation in a professional capacity since the need for a ministry search was announced. See the section on Eligibility for Ministers in Search for more information.
12. Once the profile is complete, your team should click "complete record" and then "publish." Doing so will push your changes to a version of the document which can be

previewed by regional staff. **Please let your primary contact on regional staff know that your profile is ready for review.** Your primary contact (or the Congregational Transitions Director) will review your profile for clarity, consistency, and a balanced view of your congregation's unique strengths and challenges. They may offer feedback or request changes before the Congregational Transitions Director publishes it.

13. *We will publish Primetime Contract ministry listings published between 02 December and 15 February, and Open Contract ministry listings after 01 April.* Here is the calendar for both of the 2026 contract ministry search cycles.
14. Once the search profile is posted, ministers will apply to the search team through the MinistrySearch System. Search team members will receive emails from the system to let them know when they have applicants. They will be able to see applicants' full ministerial records in the system. The search team should plan to gratefully acknowledge each application with a brief email with a link to the supplemental documents listed below.
15. The search team should provide all applicants with a link which anyone with the link can view to an on-line folder (Google Drive, Dropbox, etc.) with:

    - Draft ministerial agreement/contract (board-approved) and change log, if changes from the UUA/UUMA model agreement were made and not tracked in the draft agreement itself
    - Bylaws
    - Covenants or policies around behavior or expectations of congregations (like a safe congregation policy)
    - Recent board and annual meeting minutes
    - Recent budgets
    - Benefits information
    - Employer Participation Agreement for the UUA Retirement Plan
    - Search team bios
    - Anything else leadership wants to share with applicants

    Your website is also a source of information for potential applicants. Expect ministers to scour it.

16. If a minister reaches out to you about your position and seems unwilling to use the MinistrySearch system, please contact your regional staff or the UUA Transitions Team to determine if the minister is eligible to serve.
17. Search teams should fully and fairly consider all applicants, using an inclusive process that honors the unique needs, perspectives, identities, and skills of all search team members and applicants, in alignment with our Unitarian Universalist values.
18. Search teams should stay in touch with applicants throughout the discernment process (ministerial record and website review, interview, reference checking, etc.). Prompt evaluation and courteous communication make a good impression on applicants.
19. Search teams should plan to interview top applicants via videoconference after reviewing the applicants' materials. Each member of the search team should participate in each interview. Search teams may check references before or after holding interviews.
    - Link to download sample questions used by settled ministry search teams (may be adapted)
20. **References and confidentiality**: as the search team moves forward with discernment, the search team should keep the identities of applicants confidential both in their own congregation and in the process of learning about applicant ministers. They should only reach out to references provided by the applicant minister. They should NOT, for example, reach out to someone in leadership at the congregation where an applicant minister is serving if that person's name was not provided as a reference, as that leader may not know the minister is in search.

21. Search teams should not attend live worship led by an applicant on-line or in-person, though they are free to watch recordings which are provided by the applicant or available to the public. Attending live worship can breach confidentiality and may lead to the withdrawal of an applicant who did not consent to this. Please check in with UUA transitions staff with any questions about confidentiality.
22. In-person visits with top applicants are not baked into the contract search process, though they are permissible. If a contract search team invites top applicants to visit, they should cover the ministers' travel and hospitality expenses up front or by prompt reimbursement, being careful to keep applicants' names out of search team financial records which will be submitted to finance or administrative volunteers. The search team should always keep confidentiality in mind during visits so that the congregation's staff, volunteers, and members will not learn the identities of ministers whom the congregation has not hired.
23. While *UUA staff does not provide references for ministers in search*, the search team may reach out to UUA regional staff for a unique perspective on the ministries of top applicants. They may ask applicants who on regional staff is most familiar with their ministry or ask the Congregational Transitions Director for a connection to regional staff with relevant knowledge. See this section for information on research calls with UUA staff.
24. As the search team makes decisions about applicants, they should be sure to use the "dismiss" button in the MinistrySearch System. Doing so opens an email (which may be customized) to thank and release applicants who are no longer in consideration. Do not be shy about using this button! It frees applicants to focus on ministries where their gifts align with congregational needs.
25. If the board needs to learn about the recommended candidate before the search team can make an offer, or if the board needs to make the verbal offer, the search team may ask the or top applicant(s) for permission to share their ministerial search materials with the board and be prepared to share their reasoning for their rankings or recommendations. *In the Primetime search, this should happen before submitting rankings to the UUA on or by 23 March.*
26. Primetime and Open contract searches have different offer approaches:
    - For a Primetime search, the search team will submit a ranking of its applicants to the UUA Transitions Team on or by 23 March using this form. Ministers will also submit rankings which may include Primetime contract, settled, and developmental positions for which they applied. The UUA Transitions Team will notify all search teams and ministers of their matches on the 24th or 25th, as soon as a match is clear. The search team should reach out to make a verbal offer to their match on 26 March at noon Eastern time. If the search team has no match, the UUA Transitions Team will convert the Primetime contract search to an Open contract search and the search team will continue looking for a minister, unless the board objects.
    - For a Primetime search, this is how the matching process plays out: The UUA Transitions Team will figure out the highest-ranking match for everyone and let everyone know what is likely to happen on offer day *before* offer day. For example, if Rev. A and congregation X identify each other as mutual first choices, it is a match! If Rev. B identifies congregation Y as their first choice, and congregations Y and Z both identify Rev. B as their first choice, Rev. B has a match with congregation Y. The UUA Transitions Team would then check for an alignment between congregation Z and their second choice. Occasionally, matches are more complex to determine. Perhaps the UUA Transitions Team will need to have a conversation with a minister or search team about a tie or a potential match identified as a maybe. Search teams should prepare to be responsive to messages from the UUA Transitions Team in the days between the ranking due date and offer day.

    - For an Open contract search, the search team (or board) may make a verbal offer and move into negotiations whenever they feel they have found a minister who is a good match for the congregation's needs.
27. The board will negotiate and finalize the contract with the minister once a verbal offer is extended and accepted. If the board needs assistance working out the final compensation and benefits details, they may reach out to the Office of Church Staff Finances at comp@uua.org. The minister may reach out to a UUMA Good Offices specialist in contract negotiations for assistance.
28. The board should make sure that the congregation initiates a criminal background check on the hired minister as doing so is a good practice in hiring for a religious organization (see relevant section to follow).
29. Once the contract is signed, board leadership or a staff person familiar with the terms of the finalized contract should complete the Notice of Call of Hire to update UUA records on the new ministry. Archiving the search profile initiates a reminder to submit this form.

Important reminders about any ministerial search:

- Ministers usually apply to multiple congregations.
- Ministers want clarity about what percentage of time they are being asked to serve.
- The first consideration in a minister's decision-making process is often compensation.
- The more authentic a search team is about who they are and what they need from a minister, the more likely they are to get a minister who can serve them well.
- Using the UUA's MinistrySearch system is more likely to get interest than just trying to get the word out through other channels. Use of the system is limited to ministers who are cleared for search. Ministers who have lost fellowship, have not been credentialed as Unitarian Universalist, or have misconducted are not eligible to have their names released to search teams.
- Ministers do not appreciate being "cold called" by search teams soliciting applicants. Ministers who are interested in searching know how to see which congregations are in search. If your search team or congregation is in relationship with a minister, it's fine to invite them to apply through the MinistrySearch system.

If you have questions, ask for assistance from the Congregational Transitions Director or the UUA Transitions Team.

Compensation, benefits, and relocation for contract ministers

- Follow this link to find your congregation's Geo index and salary tables.
- Follow this link to learn more about fair compensation.
- If your current minister is paid below the mid-level recommended guidelines, you should at least maintain or raise the salary to find the best minister possible.
- If your current minister is paid above the mid-level recommended guidelines, you should at least pay the mid-point, unless you are getting a minister with more experience than your current, outgoing minister. In that case, you should match or raise the compensation.
- You should be prepared to pay full benefits in the compensation package. Please use the Compensation Worksheet to calculate the total cost of ministry.

- The UUA recommended sample contract ministry agreement can be found here and on the Transitions website. It is written for a half-time arrangement but may be easily scaled to another percentage of time using parenthetical references throughout the document. Deviating from the recommended contract is discouraged.

Congregations should compensate ministers fairly.

Fairness includes:

- Compensation (salary and housing)
- Benefits (retirement, health, dental, long-term disability, life insurance, half of the minister's self-employment taxes)
- Professional Expenses (10% of salary and housing or a minimum of $8,000, prorated for the percentage of time)
- Relocation costs: contract ministry searches which do not provide for relocation costs may have only local applicants. Congregations typically budget $10,000-$15,000 for relocation expenses in other types of searches. Keep in mind that ministers are taxed on relocation expenses.

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

Every congregation resides in a Geo index or wage rate area and is of a particular size. Both correlate to what is expected to be adequate compensation.

Follow this link to find your Geo index and salary tables.

Contract Ministers are employees, not independent contractors. This makes them benefits-eligible. They should receive W-2s, not 1099s. If they are not yet in fellowship or ordained, taxes and payroll are handled as they are for non-ministerial staff.

Congregations which can pay at the recommended mid-point for their Geo index and size for contract ministry receive more applicants. If your congregation has been paying less than this and cannot offer in-range compensation, you should not expect many applications for the ministry position.

If your leadership and your current (perhaps previous) minister kept their salary/housing lower than fair compensation guidelines suggest (as often happens in congregations where the minister is there for a while), know that you are dealing with a deferred congregational problem, and not the incoming minister's problem. This will likely affect the search unless you begin to offer fair compensation. Simply put, take responsibility for the fact that the minister has been underpaid and work to correct the issue, as well and quickly as you can.

Your leadership should not reduce the hours or compensation of other religious professionals on staff to pay a minister a higher wage. This would harm the programs of your congregation and could set up the new minister for resentment from the rest of the staff. If your congregation is struggling to afford and sustain fair compensation for all staff, leaders should be in touch with the UUA's Church Staff Finances team or regional staff for guidance in thinking through this challenge.

Benefits

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

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

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

Professional expenses

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

Follow this link to learn more about professional expenses.

Year-long Transitional Ministry Training

Contract ministers are encouraged to take the transitional ministry training offered by the UUA, especially new ministers and those in ministries which require some extra skill and care. The UUA offers this training in collaboration with the Interim Ministry Network. This training was once only available to interim ministers. Contact the UUA Transitions Team for more information about this year-long, cohort-based training, including the cost to the congregation, scheduling, and content.

Relocation

This is often very hard on both minister and congregations. Relocation expenses are usually 10% of salary and housing because moving is so expensive. Relocation expenses are now considered taxable income by the US government, so the congregation is encouraged to help offset the additional tax burden. Everyone is encouraged to find ways to help and save. Congregations in search for a contract minister who do not provide relocation expenses may have only local applicants.

Any search team 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 501(C)(3) status. Please contact the UUA Transitions Team 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 UUA Transitions Team for more information.

When the minister commutes from a longer distance:

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

Offer and background checks

When you make an offer, the offer is contingent on a successful background check as well as coming to agreement on the specifics of the offer being made. While you can use any company you wish to complete a background check, here are some options:

- Oxford Document Management Company
- Church Mutual Insurance Company

Once the contract ministry begins

Upon request, a new ministry start-up may be available to the congregation and minister. Regional staff lead programming to help the minister and congregation begin to get to know each other and align hopes and expectations for the partnership ahead. Ministers and board presidents may be in touch with regional staff once the ministry partnership begins to determine whether a start-up would be beneficial.

Sample contract ministry evaluation

This form may be submitted electronically here.

Congregation:
Minister:
Evaluation for Time Beginning: _____ and Ending: _____
Person, completing/submitting evaluation form:

Role in congregation:

1. What was effective/worked well during the contract ministry?
2. What did you want more of from the ministry?
3. What did you want less of or differently from the ministry?
4. What else should be known about the congregation and/or minister?

Short-term Contract Ministry and Sabbatical Coverage

History

The Targeted Ministry Program (TMP) was created through the partnership of UURMaPA (UU Retired Ministers and Partners Association), the Congregational Life staff team of the UUA, and the UUA Transitions Team. In 2024, we expanded the capacity of our MinistrySearch System to help make these connections in a more fair and transparent way. Short-term ministries are now handled as short-term contract ministries, and not as placements brokered by UUA staff. UUA staff may suggest that ministers apply whom they think might do good work with a congregation, but the hiring decision is between the minister and search team.

How it works

Congregations share a bit about their needs and context in a search profile, and ministers apply directly to the congregations in search by sharing their ministerial records with search teams.

Is this like interim ministry?

While targeted ministry work can be like the work of interim ministry, it is short-term and wider ranging than our current model of interim ministry. Part-time, short-term ministries are generally for fewer than 6 months, and full-time, short-term ministries usually do not exceed 2 months (unless there are significant reasons like a death of a minister).

Possible reasons for requesting a short-term minister

- Any ending to a ministry that is not timed with the annual search cycle: death, illness, family emergency, negotiated ending, etc.
- Sabbatical coverage
- Congregations considering and wanting to try new ministry (first professional ministry, an assistant ministry, or specialized ministry like pastoral care, social justice, or family ministry)
- Multisite congregations looking for specific extra help
- Innovative congregational projects best overseen by a minister

Congregational considerations for short-term ministry

- Congregations should work with regional UUA staff to clarify goals for the ministry with reasonable and achievable expectations
- Congregations are expected to pay the minister for their services in accordance with UUMA and UUA recommended guidelines
- Housing for a minister from outside the area should be provided by the congregation at their expense, whether it be an extended stay hotel, a vacated seasonal home, etc.
- The leadership of the congregation should work with the congregation and minister to ensure clarity of the goals as the ministry begins

Costs

The congregation is expected to pay:

- Salary/housing—at least the midpoint for that congregation's size and Geo index
- Retirement benefits (required by federal law)
- Social security tax (in lieu of FICA/self-employment offset tax) 7.65% of salary

Additional benefits can be negotiated.

Sabbatical coverage

The short-term ministry search process can be used to find a sabbatical minister. It is best if congregations list these positions 6-8 months before the sabbatical begins. Congregations which offer compensation that aligns with UUA and UUMA recommendations, travel expense reimbursement, and/or lodging provisions receive the most applications.

Short-term ministry search process

1. Check your bylaws to see what they say about hiring transitional ministers. If they do not align with the process below, please contact the Congregational Transitions Director.
2. **Board and search team members may contact Christine Purcell, Congregational Transitions Director, at any time during the search process for support**: cpurcell@uua.org. She holds open office hours each week on Zoom for those in transitional ministry searches on Tuesdays from 3:00-5:00 PM Eastern time: https://uua.zoom.us/j/95425414067
3. The search team for a short-term ministry is usually a taskforce of the board. If this is a short-term ministry with a senior minister who will supervise the short-term minister, the minister will likely be on the hiring team.
4. The board should charge the search team with its work. The board should determine and let the search team know which responsibilities lie with the whole board and with the search team. For example, will the whole board review the congregation's search profile before publication? Who makes the verbal offer to the top choice applicant, the board or the search team? If the search team cannot make the final decision on the candidate, what will the board need to consider the candidate identified by the search team?
5. The search team and board should prepare a draft employment agreement to share with applicants. Our contract ministry template can be adapted for this purpose. Please contact our compensation staff at comp@uua.org for support in thinking through compensation, benefits, and tax implications of the agreement.

    - Contract ministry agreement template
    - UUA geo index listings and salary tables
    - Guide to UUA Salary Recommendations
    - Benefits, Compensation, and Aid Funds (note: some benefits are required)

6. Once the search team is in place, they should share the name and email addresses of at least one member with the Congregational Transitions Director, Christine Purcell: cpurcell@uua.org. She will open a profile for the search team in the MinistrySearch System, the on-line portal where searching ministers and congregations connect.

7. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the search profile. This is the person search teams ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or UUA Transitions Team, not to regional staff.**
8. While the search team could download the profile questions for work outside of the search system, copying and pasting responses takes time, and frustrating formatting errors are likely. If you decide to work off-line on the questions, you should clear formatting before pasting text into the system. It may be easier to work on the profile in the search system, saving changes as you go, as the search system is stable.
9. Per Ministerial Fellowship Committee rules, UUA Transitions Team policy, and ministers' covenant with one another for fair search process, if you have an inside candidate for your position, your search team must make an up or down decision on this candidate before publishing the search profile for the review of potential external applicants. An inside candidate is someone on staff in or affiliated with the congregation or, in the case of full-time ministry searches, someone who has visited the congregation in a professional capacity since the need for a ministry search was announced. See the section on Eligibility for Ministers in Search for more information.
10. When working on the search profile, the search team should be aware that our search system uses a shared set of questions for all types of ministry searches, and customized questionnaire sections which relate to specific types of ministry searches. **Focus on the questions in the position basics, compensation and benefits, questionnaire, demographics, and accessibility sections.** For questions which seem too detailed for a temporary ministry partnership, it's fine to use placeholder text like "optional for targeted ministry application" as your responses. It's also fine to respond to more questions or prompts, as your responses will pre-populate the next search profile for your congregation as editable starter text.
11. Once the profile is complete, your team should click "complete record" and then "publish." Doing so will push your changes to a version of the document which can be previewed by regional staff. **Please let your primary contact on regional staff know that your profile is ready for review.** Your primary contact (or the Congregational Transitions Director) will review your profile for clarity, consistency, and a balanced view of your congregation's unique strengths and challenges. They may offer feedback or request changes before the Congregational Transitions Director publishes it.
12. Once the search profile is posted, ministers may apply to the search team through the MinistrySearch System.
13. Search team members will receive emails from the system to let them know when they have applicants. They will be able to see applicants' full ministerial records in the system. The search team should plan to gratefully acknowledge each application with a brief email and share their timeline for mutual consideration and a copy of the draft employment agreement.
14. Search teams should fully and fairly consider all applicants, using an inclusive process that honors the unique needs, perspectives, identities, and skills of all search team members and applicants, in alignment with our Unitarian Universalist values.
15. Search teams should stay in touch with applicants throughout the discernment process (ministerial record and website review, interview, reference checking, etc.). Prompt evaluation and courteous communication make a good impression on applicants.
16. Search teams should plan to interview top applicants via videoconference after reviewing the applicants' materials. Each member of the search team should participate in each interview. Search teams may check references before or after holding interviews.
    - Link to download sample questions used by settled ministry search teams (may be adapted)

17. **References and confidentiality**: as the search team moves forward with discernment, the search team should keep the identities of applicants confidential both in their own congregation and in the process of learning about applicant ministers. They should only reach out to references provided by the applicant minister. They should NOT, for example, reach out to someone in leadership at the congregation where an applicant minister is serving if that person's name was not provided as a reference, as that leader may not know the minister is in search.
18. Search teams should not attend live worship led by an applicant on-line or in-person, though they are free to watch recordings which are provided by the applicant or available to the public. Attending live worship can breach confidentiality and may lead to the withdrawal of an applicant who did not consent to this. Please check in with UUA transitions staff with any questions about confidentiality.
19. While *UUA staff does not provide references for ministers in search*, the search team may reach out to UUA regional staff for a unique perspective on the ministries of top applicants. They may ask applicants who on regional staff is most familiar with their ministry or ask the Congregational Transitions Director for a connection to regional staff with relevant knowledge. See this section for information on research calls with UUA staff.
20. As the search team makes decisions about applicants, they should be sure to use the "dismiss" button in the MinistrySearch System. Doing so opens an email (which may be customized) to thank and release applicants who are no longer in consideration. Do not be shy about using this button! It frees applicants to focus on ministries where their gifts align with congregational needs.
21. When the search team finds the minister who is best for the congregation's needs, they may recommend a hire to the board or make a verbal offer to an applicant, in alignment with the agreements about roles and responsibilities between the board and the search team. If the board needs to learn about the recommended candidate before an offer is extended, the search team may ask the candidate minister for permission to share their ministerial search materials with the board and be prepared to share their reasoning for recommending the minister they chose.
22. The board will negotiate and finalize the contract with the minister once a verbal offer is extended and accepted. If the board needs assistance working out the final compensation and benefits details, they may reach out to the Office of Church Staff Finances at comp@uua.org. The minister may reach out to a UUMA Good Offices specialist in contract negotiations for assistance.
23. The board should make sure that the congregation initiates a criminal background check on the hired minister as doing so is a good practice in hiring for a religious organization (see relevant section to follow).
24. Once the contract is signed, please share a copy of it with the UUA Transitions Team: transitions@uua.org. This will let us know that we can close and archive your search profile.
25. Board leadership or a staff person familiar with the terms of the finalized contract should complete the Notice of Call of Hire to update UUA records on the new ministry.

Important reminders about any ministerial search:

- While the board is responsible for hiring the short-term minister, board members should be in conversation with other leaders, staff, and the rest of the congregation about the ministry partnership ahead to build trust and buy-in.
- Ministers usually apply to multiple congregations.
- Ministers want clarity about what percentage of time they are being asked to serve.
- The first consideration in a minister's decision-making process is often compensation and benefits.

- The more authentic a search team is about who they are and what they need from a minister, the more likely they are to get a minister who can serve them well.
- Using the UUA's MinistrySearch system is more likely to get interest than just trying to get the word out through other channels. Use of the system is limited to ministers who are cleared for search. Ministers who have lost fellowship, have not been credentialed as Unitarian Universalist, or have misconducted are not eligible to have their names released to search teams.
- Ministers do not appreciate being "cold called" by search teams soliciting applicants. Ministers who are interested in searching know how to see which congregations are in search! If your search team or congregation is in relationship with a minister, it's fine to invite them to apply through the MinistrySearch system.

Sample short-term ministry evaluation

The board and minister may complete this form together to update the UUA on how the ministry partnership went.

The Contract to Call Process

Most contract ministry arrangements offer the opportunity, at some point, for the congregation to call the minister. People often ask UUA staff, “When should we do this?” or “How quickly can we do this?”

Many, if not most, ministries start well. The congregation is grateful for ministry and the process of building a trusting working relationship often feels like it is proceeding smoothly, even easily. This will not always be so. How a congregation and minister work together through conflict is important, and success in doing so may be a good indicator that the relationship will continue to be mutually beneficial.

UUA staff generally recommend a call after the first year of a contract ministry. Historically, the UUA has recommended waiting two or more years to move into a call process. Trust and a working relationship can take longer to develop than a year. That said, some congregations have done intentional transitional or interim ministry and may have even gone through a settled search without finding a minister to call. Such congregations may be more ready to call a minister than others. The UUA respects the discernment and agency of ministers and congregation in determining readiness for a contract-to-call process.

There is no detriment to being sure of the relationship before moving toward a call. There is no prize for rushing. Do this well. Offer the minister and the congregation respect for the time it takes to establish a true working relationship, even when there has been conflict and disagreement. Trusting each other, an act of faith, takes time and is essential for a successful call.

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

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

Typically, the call process begins following a congregation-wide evaluation of the ministry (not just the minister) after at least the second year of a contract ministry. The congregation must discern if there is an alignment that is more significant than what is sought with a consultant of any type, and if the transition to open-ended, settled ministry seems like a good fit. The minister must discern if committing to a long-term relationship with the congregation is the best course for all concerned, given the dynamics experienced in the contract period and the minister’s personal call to serve the Unitarian Universalist faith. Together, the congregation and minister

must assess whether vision, leadership, and financial resources are sufficiently robust to sustain new and ongoing progress in a settled ministry.

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

Considerations of the congregation

The congregation should think carefully about its willingness to vest their contracted minister with ongoing, indefinite leadership. Deciding whether to keep a minister who already has relationships, critics, and supporters may be complex for a congregation. A definite and distinct decision process which meets the requirements of congregational by-laws and is agreed upon and explained in advance to the entire congregation, can and will minimize miscommunication and conflict.

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

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

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

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

Considerations of the minister

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

When to engage the contract to call process

A contract minister should accept a call only after a full and intentional period of assessment and discernment. In some cases, a formal contract-to-call arrangement is in place, usually stipulating that the minister is free to accept a call from his/her congregation shortly before the end of the term of an employment agreement. The UUA recommends that congregational leaders consider the time remaining on the current contract and the annual ministry search cycle when determining how and when to move toward a call.

A congregation deciding not to initiate the call process should contact regional UUA staff, who, along with the UUA Transitions Team, can support and assist lay leaders and the minister as they explore other ministerial options. It may prove unrealistic to expect a contract minister to serve effectively as interim minister if a call, expected by either party, fails to materialize. In this case, it may be better to work with the UUA Transitions Team and regional UUA staff to identify a minister who may serve as a transitional minister while the congregation engages in a search process.

How to call a contract minister

What if we need help?

Board leaders and call process task force members should contact the Congregational Transitions Director, Christine Purcell, and/or the congregation's primary contact on the regional UUA staff team for assistance in planning a call process.

Call Process Task Force

When interest arises in a call after a recent, generally positive assessment of the ministry, the congregation's governing board appoints a special call process task force to coordinate the decision-making process. The call process task force is charged with leading the membership in considering the question of a call and recommending a course of action to the congregation. While it may be tempting to assign this function to an existing committee, a fresh, unbiased, diverse committee of five to seven members, representing a range of interests, age, gender, cultural identity, and tenure in membership will more easily gain the broad-based confidence of the congregation.

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

The call sermon

Early in the call process, a call process task force member or a hired speaker may deliver a sermon or homily on “The Call.” The service may focus, in a general way, on what the call means to whoever presents it. The service might also touch on the meaning of congregational polity, as final decisions about ordination and calling of ministers reside with congregations.

Communication

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

Small group meetings

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

Selection and role of small group facilitators

When selecting small group facilitators, choose individuals with solid listening and group process facilitation skills. Also, facilitators should be regarded by the congregation as unbiased and objective with the ability to create a safe environment where each participant can speak and listen in an atmosphere of mutual respect. For instance, when discussion about the minister occurs, the facilitator must be able to keep the focus on the role of minister and this minister’s ability to fill the role, and to hear all points of view. The call process task force should plan to meet with the facilitators before the session to make sure communication is clear and unified and to respond to facilitators’ questions. Before the small group meetings begin, facilitators may want to take time to record their own answers to the questions they will be asking the other congregational members. This will allow them to pay better attention to participants in the small group meetings when the time comes.

Tips for small group facilitators

- Arrive early and ensure your space is comfortable and welcoming.
- Make sure that you have the proper tools: newsprint, easel, markers, etc.
- Be familiar with the list of questions to be asked.
- Set the ground rules first.
- Tell participants that:
    - the session will last from ___ to ___
    - The session framework is a series of questions designed by the call process task force.

    - Everyone in the group will have an opportunity to respond. Advise participants if you will be using a specific process (i.e., if you will be going around the circle one at a time, etc.)
    - Your role as facilitator is to maintain focus, to make sure everyone has an opportunity to speak and listen, to be objective, etc.
    - the content of the session must remain confidential.
    - Everyone is expected to listen actively and respectfully to one another.
    - This process is about discerning what is good for the congregation.
- Make sure there is someone willing to act as a recorder.
- Encourage participants to use “I” statements.
- Encourage everyone to talk. Ask the more reserved participants if they have something to add.
- Avoid having the conversation become personal about the minister or other members of the congregation.
- Have the group agree on the recorder’s notes before sharing them with the Task Force.
- Thank participants for their willingness to spend their time and energy for their church community's benefit.

Selection and role of small group recorders

Each small group has a designated recorder to document what is said during the small group meeting and to submit a report of the group’s views to the call process task force following the meeting. It is important to designate someone who can represent accurately what is said. It can be helpful to identify the recorder and gather their responses to the questions which will be asked of the group in advance so they can focus on recording what others say during the meeting.

Call Process Task Force role in small group meetings

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

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

Small group meeting summary report and its distribution

After receiving the small group reports, the call process task force should plan for at least two meetings to consider their larger charge and process and summarize the findings. While some members will express their views in terms of adequacy and inadequacy of the minister, the committee’s report should clearly focus on the question, “What is best for the congregation as a whole?” The task force then summarizes all reports into a larger report. In this report, trends and

points of consensus are identified. The report does not need to include statistical analysis but can use language indicating trends and general weights i.e., “most members, some members, few members,” etc. A nuanced view that frames multiple perspectives is better than an attempt to distill all perspectives into a single narrative. The report needs to be constructed in such a way that it is not possible to identify the responses of individuals or small groups.

If issues arise with deliberations of the call process task force that cannot be resolved, contact regional staff, the Congregational Transitions Director, or others on the UUA Transitions Team for assistance.

Before presenting a summary report to the congregation, there should be a discussion with the minister and the board regarding what information needs to be shared with the congregation at large and by what method. When sharing the results of the report with the minister, it is important to consider how information will be presented to them prior to the discussion. A few members of the call process task force and the Committee on Ministry should be present when discussing the summary report with the minister to ensure that a broad and clear understanding of the information is achieved. The information and discussion at this meeting are to be kept confidential.

If the report's findings are negative, no more than two people should be present when reviewing the findings with the minister. The chairs of the call process task force and the Committee on Ministry may be the best choices for this task. In the case of negative findings, prior preparation for the discussion becomes even more critical. It is essential that information be presented factually to the minister, while speaking the truth in the spirit of love. At this point, the minister may decide to withdraw from the call process and save the congregation from divisive feelings or offering up a “no” or “split” vote at a later congregational meeting.

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

Making the decision to call

A consensus decision is desirable for whether to recommend a vote for a call to the board and then to the congregation. It is courteous for one member of the call process task force to meet privately with the minister to report the recommendation before presenting it to the board. The board may wish to endorse the call process task force’s recommendation or simply pass it along to the congregation. A summary report should be prepared and made available to the congregation at least two weeks prior to the congregational meeting.

Congregational vote

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

The special congregational meeting to consider extending a call to the minister will be facilitated by the board with the support of the call process task force. The meeting should be publicized widely, encouraging a large turnout. This is a momentous time in a congregation's life. Using paper ballots will ensure individual privacy.

Although a congregation's bylaws may set forth a minimum positive vote (usually a super-majority) required to call a minister, the minister will often set a higher threshold regarding what level of support (% of votes) they will consider necessary to accept a call to settled ministry. The UUA Transitions Team recommends affirmative votes of at least 90-95% (of voters participating, not membership) when calling a minister in an open search process. Because an incumbent minister has established relationships within the congregation, undoubtedly including some with critics or detractors, a minister currently serving in a contract capacity may be quite content with an affirmative vote as low as 85%.

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

Installation ceremony

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

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

Committee on Ministry

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

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

Suggested call process timeline

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

Keep in mind as you plan when to begin the process that most ministers search between December and May for new positions. It would be best to hold the vote to call no later than March 15 to give both the minister and the congregation appropriate time to enter the transitional ministry search process for an August start date if the call process does not work out.

Sample timeline

Month 1: The board appoints a call process task force. The task force meets with the current minister to determine whether the minister will consider a call, if extended. If “Yes,” then follow the remaining elements of the timeline. If “No,” then the ministry may continue in its current configuration, or a search process may begin. The task force should advise the board and consult with your regional Congregational Transitions Director about next moves.

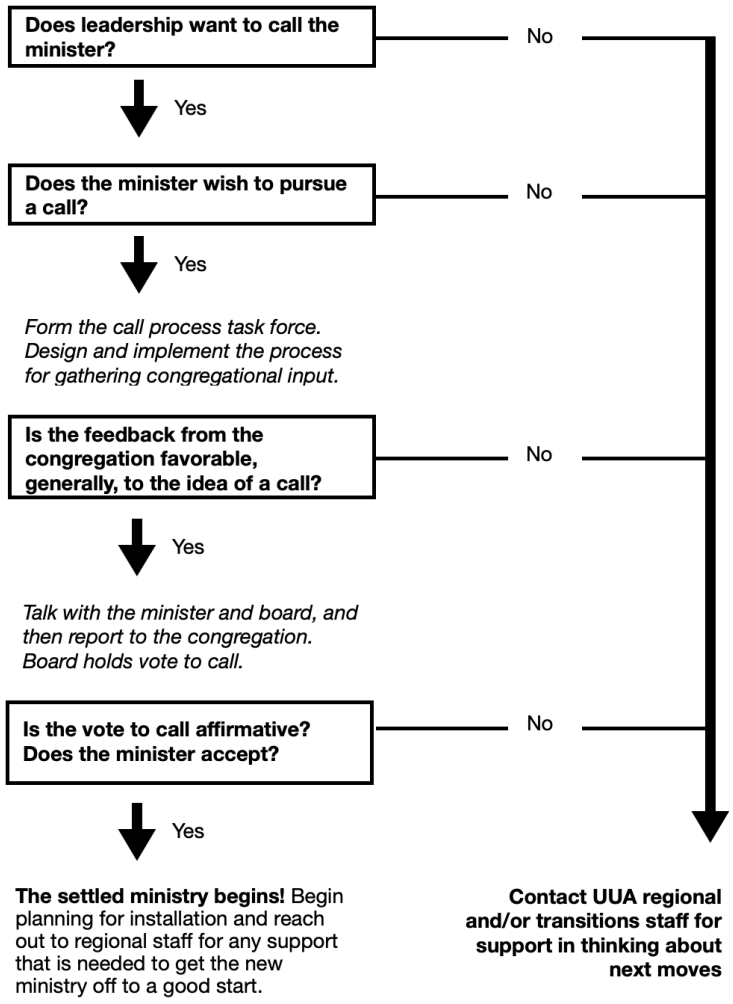
Month 2: The call process task force meets to plan its process, to develop a timeline, and to assign responsibilities to its members. The task force communicates its plan to the congregation.

Month 3: A call process task force member, UUA consultant or staff member, or an area minister delivers a sermon about called ministry during a Sunday service.

Month 4: Small group meetings take place. The call process task force presents a summary report to the board, minister, and congregation.

Month 5: the board holds a congregational meeting to vote on the decision to call the minister. If affirmative, the minister accepts or declines. Contact regional UUA staff if the call result is not affirmative, or if the minister declines.

Contract to call decision tree



Hiring for other staff positions

Religious professional staff (non-clergy) positions can be posted on the Jobs Board of the MinistrySearch system.

To list such a position, please complete this form. Be sure to have a link to your job description and directions for applying before filling out the form.

The Settled Ministry Search

- Phase 1: Concluding a Ministry Well emphasizes the importance of a good ending for the sake of the memory of the ministry that is coming to a close and the openness to the new ministry that is to come. Celebrating the good ministry that the departing minister and congregation have done together stabilizes the congregation in a time of anxiety.
- 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 team wisely, fund the search, and connect with a search team 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 team roles, process, and organization. The work of the search team 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 the Search is about the search team 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 a New Ministry is about what happens during candidating week and beyond.
- If No Match Occurs: this section is for congregations and ministers who are interested in continuing in search but did not find or become a candidate by the offer date.

By sorting this information into different phases, our hope is that you will understand that ministerial search is multi-faceted and manageable, and that clarity about process will help you to make good decisions.

Percentage of time

- Any ministry search that is not for a full-time position (100%) is considered a contract ministry search. Please be in touch with the Congregational Transitions Director if your congregation needs to pivot from a full-time to a part-time ministry search.

- Congregations must be clear about the percentage of time they are requesting from a minister before posting any position. A search for a settled minister must be 100% full-time.

Language of hire and call

- Settled ministers are called by a congregation. Most ministers want at least a 90-95% affirmative 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 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 UUA Transitions Team 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 in search communications. Most people outside of a congregation do not know other congregations by acronyms. Please list city and state/province in communications.
- Understanding good manners is not the same across cultures, regions, and identities. Do not assume your understanding of manners matches everyone else'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 currently. It also allows you to create your own message. Please use the dismiss button in the system for this purpose.
- Remember that this is not a corporate or academic hiring process. This is a ministry search. It is designed to help ministers and congregations find each other in a hurting and chaotic world so that our congregations may be places of hope, care, and transformation. Treat each other well with this awareness in mind.
- The UUA Transitions Team is available and willing to listen if you need to vent about frustrations or share 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 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 agree to enter into the search covenant by having access to 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 Team fully abides by the covenant below.

Settled ministry search covenants

On behalf of congregational boards, search teams enter into covenant using the checkbox in their search profile in the MinistrySearch system. Applicant ministers do the same in their search profiles. Participation in the settled ministry search requires agreeing to and following the covenant (see covenant section).

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.

Congregational staff

- Staff members serving UU congregations in search may not serve on the ministerial search team, except in rare cases when a minister or executive director on staff is in a co-equal role to the minister who will be identified in the search process.
- Staff members should not be interviewed by 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 team 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 UUA Transitions Team 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 are expected to take part in the "Break Barriers, Build Beliefs" 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 may experience micro-aggressions, bias, and supremacist thinking at times. This does not mean you cannot do good ministry or good work as part of the search team. Reach out to the UUA Transitions Team if you would like some support.
- 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 UUA Transitions Team. Search team members experiencing bias in the process, if other members of the search team are unable to acknowledge and handle the bias, should talk to their interim minister, the Congregational Transitions Director, or UUA Transitions Team.
- Search team members needing help understanding issues of supremacy and fragility who are not from marginalized groups should contact the Congregational Transitions Director.

- 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.

Inside candidate process

the way to move from a contract ministry to a call using the settled ministry search process

Per Ministerial Fellowship Committee rules and UUA Transitions Team policy, certain ministers are only eligible to be called to a congregation through the settled ministry search process as an inside candidate:

- a minister who is a member or staff member of a congregation seeking a settled minister (this could be a contract minister who is serving year-to-year or a second minister)
- an affiliated community minister
- a minister who has visited the congregation in a professional capacity since the departure of the most recent settled minister was announced.

While a congregation could simply decide to vote yes or no on inside candidacies without a search team due to congregational polity, the UUA Transitions Team 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 process modifications for inside candidate consideration are fairly simple and much of the process remains intact:

- The congregation still elects a search team by the recommended process.
- The search team still leads the congregation through the learning process of what kind of ministry it needs next.
- The search team still compiles search materials as the handbook requires.
- The search team prepares the congregational record and shares it with the inside candidate.
- The search team will prepare for pre-candidating.
- The search team 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 team must consider whether they will consider an inside candidate. Ideally, this is their idea, and they ask the contract minister to apply for the settled position. If the contract minister asks, then the search team must decide whether this is a viable possibility and then move on after the decision.
- Small group meetings may focus not only on congregational needs but how the potential inside candidate would fill those needs.
- Once the congregational record is reviewed and shared with the inside candidate, the search team requests the ministerial record of their inside candidate from the UUA Transitions Team.
- The UUA Transitions Team will release the ministerial record to the search team early and the search team will have a pre-candidating weekend with the contract minister/ inside candidate.

- After the pre-candidating weekend, the search team will meet to decide whether to recommend the minister as their candidate.
- If the minister is recommended as the candidate, the search team alerts the UUA Transitions Team of their decision and may schedule a candidating week beginning as early as January with the contract minister as their candidate.
- If the minister is not recommended as the candidate, the search team alerts the UUA Transitions Team of their decision and should consult with the UUA Transitions Team about their options, which include continuing or suspending the search.
- If the search team continues the search, the congregational record may be published in early December for potential external applicant consideration, pending official notification to the inside candidate and approval from the UUA Transitions Team.
- 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 is ended for the year for a settled position and the search team and congregational leadership should consult with the UUA Transitions Team for options.

Some tips:

- Inside candidates must express interest to the search team and the UUA Transitions Team early in the process.
- Per UUA Transitions Team policy, the search team must make a yes or no decision on the inside candidate before their congregational record may be viewed by other potential applicants. Congregational records are published for review by all searching ministers in early December, so it would be beneficial for the search team to know before that date whether they are moving forward with their inside candidate.
- If a congregation has more than one inside candidate, they should contact the UUA Transitions Team for guidance on how to proceed.
- If ministers present themselves as inside candidates to a search team and are not selected to be the candidate, they should leave the congregation, especially if there was an awareness in the wider congregation that the minister presented themself as an inside candidate. 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 team (and ultimately the congregation).

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 or associate minister). These differences become noticeable when a second minister is the inside candidate for the senior ministry role. One difference 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 assumptions and opinions of how the second minister would assume the new role. In some ways, congregations have a tough time making this shift. Thus, many second ministers wanting to become called senior ministers face difficulty being seen in a new ministerial role. Unless there has been preparation by the outgoing minister and the congregational leadership, such succession is likely to be challenging. Rarely has the 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 more 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 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 with an inside candidate: often a search team wants to see a minister preach so they can really grasp the second minister in a new role, offering a vision for the entire congregation. This is less likely when there is a solo contract minister. It is up to each search team 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 mirrors the settled search process, a contract minister may be called at any time. Once the decision on candidacy is made, the timeline for moving forward is up to the candidate minister and congregation.

Voting

If a search team decides not to recommend a contract minister for a call, the search can continue in the typical search process, provided this decision happens at a time which aligns with the settled search timeline. If a vote happens by the congregation on a candidate, the congregation should discuss options with regional staff and the UUA Transitions Team to explore best options, though moving directly back into the search process is not generally recommended.

Is there another way to call a contract minister?

The UUA shares an alternative path to calling a minister who is already in a ministry partnership with the congregation in this section of the handbook: The Contract to Call Process. This process generally works well for contract ministers already in senior or solo ministry roles. In the contract-to-call process, the congregation would not likely be eligible to enter an external search immediately for settled ministry if the call process does not yield a settlement agreement; instead, they would likely search for a transitional minister (contract or interim). The UUA Transitions Team staff can provide guidance on next moves should the candidacy not work out.

Phase One: Concluding a Ministry Well

Please refer to the earlier section, Ending a Ministry Well.

Church website and social media

Congregations should be aware that, as soon as it is public that their minister(s) is leaving, potential applicant ministers begin learning what they can about the congregation from the congregational website. Now is a good time to review the website to see how current the information is and what information will need to be updated and changed after the ministry ends. 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 UUA Transitions Team, 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 baseline 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 represent the amounts which the congregation should budget for the interim ministry search through the beginning of the next settled ministry.

- Relocation expenses for interim minister: up to $10,000
- Search team budget: between $10,000 and 20% of the projected salary and housing amount for the settled ministry, depending on the cost of traveling to and lodging in your area for pre-candidates, candidates, and their families.
- 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 100% 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

Special notes for Canadian congregations: As members of the CUC, you are not required to support the UUA's Annual Program Fund. There is no congregational fee for search support. You may have additional costs if your minister comes from the states. Please inquire directly with the UUA Transitions Team about "Break Barriers, Build Beliefs" costs which, for US congregations, are included in the search support fee.

Interim or transitional ministry

Congregations should have a two-year interim ministry between settled ministries.

For more information, please see this section: Interim Ministry Overview.

Why you don't form a settled search team immediately

The selection of a settled search team 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 expected the call of a new settled minister in August of 2027, you would form your search team in the spring of 2026. This timing allows the congregation to do its necessary work of saying good-bye and moving into interim ministry. Often, at the time of the ending of a settled ministry, a congregation's anxiety is high. A search team 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. Rushing to “get back to normal” often holds the myth that normal is a constant. Letting time and process be your allies allows you to improve the odds to get to the new and next normal.

Be patient. Be kind. 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 emerit almost always stay away initially. 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 UU Ministers Association guidelines and to honor their responsibility to other ministers. Ideally, the outgoing minister has developed a system of support outside the congregation. If the departing 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 emerit*. What does that mean and how do we consider it?

You will find *Minister Emeritus/a policies on our website. In general, conversations and decisions about conferring this status better serve the congregation after the interim ministry has ended. Waiting until after the interim ministry keeps the focus of the congregation on needed interim work, plans for the future of the congregations, and the search process. Any minister emerit* 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 other than interim ministry?

Some congregations, in working with regional staff and the UUA Transitions Team, 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 minister is most likely to happen after at least two years of interim ministry. Any congregation that is below full time (less than 100%) uses the contract ministry search process, though interim work in a contract ministry is almost always needed. The same transitional ministry training that is required for interim ministers is available for ministers found through the contract ministry search process. Get in touch with the UUA Transitions Team for more information about this training.

Calendar

Minister announces departure (recommended)	Jan-Mar
Congregation submits Notice of Ministerial Transition	Feb-Mar
Consultation with UUA Transitions Team/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 Congregational Transitions Director	Winter/Spring

Forms and Links

- Notice of Ministerial Transition
- Transitional Ministry Handbook
- Minister Emeritus/a Policies
- Board Checklist for the Settled Search
- Settled search calendar

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 Christine Purcell, cpurcell@uua.org. She will begin initiating search profiles in the MinistrySearch system upon request on or after 15 February.

Discussion prompts

Discussion: 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 team 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 the congregation do well, and what do you wish the congregation had done better?

Phase Two: Education and Preparation for Search

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 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 congregation that has taken its time to answer these questions, one that can reflect honestly about what the congregation needs in ministry, what its strengths and challenges are, where there is hurt or distrust, where they are stuck, and where hope needs to be kindled or rekindled. Ministers want to know that their skills can be well used 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 offer 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 help 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.

The time demands of ministry are 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 team selected in a way that builds trust from the rest of the congregation? Has the minister prepared their materials thoughtfully and talked to other colleagues who have recently been in search 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.

Congregational by-laws

The congregation's leadership and interim minister should review the congregation's by-laws about the search process. If the search process is mentioned in the by-laws, ideally, they state that the congregation should follow the current recommended practices of the UUA. The board may want to discuss these by-laws with the Congregational Transitions Director in initial conversations about the search, especially if the by-laws do not align with UUA recommended practices.

Board overview of the ministerial search process

The Congregational Transitions Director 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 significant advance notice if they would like this conversation to be held outside of working hours. The Congregational Transitions Director 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 team expenses, relocation)
- UUA compensation standards (legal requirements, salary and benefit recommendations)
- How to select a search team
- Roles of the board, interim minister, search team, and congregation in search process
- Confidentiality
- Ministerial agreement & a negotiating team
- "Break Barriers, Build Beliefs" program
- Previous ministers or ministers with emerit* status
- The search overview for boards and search teams offered on Zoom each year in June

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

Selecting a search team

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

Selecting a search team is the work of both the leadership and the entire congregation. While congregational by-laws may indicate a procedure for forming a search team, and while congregations ultimately can make their own decisions, ministers are more likely to be interested in serving a congregation where the search team 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 checking 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 team 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. These are examples of tokenism.

To avoid tokenism, it is critical to commit to creating space for all perspectives to be heard and honored equally during the process. In this way, the search team and congregation will benefit from rich, diverse perspectives. For more information, see the webpage on Break Barriers, Build Beliefs.

Years of trial by interim ministers, UUA staff members, and volunteers who support ministerial search have yielded this recommended selection process. This process can be time intensive. Experience has shown that it produces good results and a high degree of respect and trust for both the new search team and the board.

1. The board and possibly the leadership development (or nominating) committee and/or other leaders divide up all the households or members in the congregation to solicit nominations. Every year, some congregations are tempted to try to use a form to collect nominations instead of personal outreach, but to do so would eliminate conversation and the ability to ask questions. A form could be used to collect responses from folks who cannot be reached by phone. While personal outreach builds trust and buy-in for the search process, inclusivity calls for multiple approaches.
2. One board of a congregation with ~400 members planned a “phone bank” approach with all the calls happening on the same afternoon. They advertised the call day in advance so members would know to expect a call. They brought in pizza and offered childcare for the ~20 callers they selected. If a caller couldn’t reach a member, they left a voicemail letting the member know that a form for search team nominations would be available for everyone who couldn’t be reached by phone.
3. Callers should engage each member in a conversation around questions like these:
    - Who in the congregation works well with others and listens well?

- 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 has been and/or is active in the congregation and has demonstrated responsible participation and leadership?
- After a high salary and desirable geography, the most attractive quality a congregation can have is self-awareness – awareness of strengths and challenges, 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?
- Who will approach the call of a minister as more than a hire? Who can put aside corporate or academic hiring practices in a search process to find a spiritual leader for our community who may stay with us for many years?
- Who would represent us well in interacting with applicants?
- After thinking about all of these questions, whom would you trust to serve on the search team on behalf of the congregation?

3. The board or nominating team caller should record the names listed in response to the last question. An easy way to do this is to make a simple Google (or other) form for callers to log names of people making nominations and those nominated for the search team. Here is a link to a sample form.The Congregational Transitions Director can provide a copy of this form for your use upon request.
4. Someone on the board, a good data manager, collects all the suggested names from the callers using the spreadsheet automatically generated by the form used to collect names, noting how many times every person suggested has been named.
5. The data manager reports to the board the top 12-14 names. It's best, if possible, to make a list, considering any natural break in the numbers. For example, if the top 13 people are mentioned more than 20 times, person #14 is mentioned 15 times, and the next three people are mentioned 14 or fewer times. The natural break is after person #13.
6. Board members call this short list to see if these people are interested in serving on the search team and if they would agree to give up any other significant leadership position they hold for the year of search if chosen for the search team**. They should also check on their availability and commitment in the fall through the spring of the search cycle (August-May). All search team members should be available for all pre-candidating weekends (February and March).**
7. It is helpful to have everyone on the ballot or slate prepare a short biographical statement that includes information about why they are interested in serving on the search team. These bios with photos should be posted in a prominent location in the building and shared in a newsletter before the election.
8. The board has the option of:
    - presenting a slate of potential search team members, with the knowledge that some volunteers will not be chosen by congregational vote or board appointment (a competitive election). For a competitive election, the board prepares a written ballot with the names listed alphabetically.

    - nominating the full search team to be elected by a congregational vote (a non-competitive election). If the board prefers a non-competitive election, the board should carefully choose a diverse team which will work well together (see considerations in item 12 below) from the short-list of folks who are trusted by the congregation and are willing to serve.
10. The voting happens at a congregational meeting. Neither self-nomination nor nominations from the floor are considered.
11. Members may vote for up to seven search team members. If someone who is appointed to the search team later drops out, please talk with the Congregational Transitions Director
12. If a competitive election is held, at the end of the meeting the board meets in executive session and counts ballots. Up to seven search team members may be chosen; 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 team instead of a search team composed of, for example, seven beloved elders of the congregation. The broader the demographic the better, especially regarding age, tenure in the congregation, gender, race/ethnicity, ability, and sexual orientation.
13. The board announces the search team, never telling anyone – including the selected search team members themselves – who was elected and who was appointed.
14. The next Sunday, the search team should be introduced with some fanfare. There might be a commissioning moment during the service when the team members are given a charge from the board, and they vow publicly to serve and take the charge seriously.

If you follow this process 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 team 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 team of five or six members.

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

Search team time commitment

The time commitment for a search team member varies based upon the role the search team member takes on, whether the team is laser-focused or takes its time with tasks and meetings, the size of the congregation (for the congregational assessment and small group meetings), and the number of applicants (higher in large congregations, congregations with higher

compensation, and in desirable geographic locations). Please share these estimates of the amount of time the search team will need to spend over the year of search with any potential search team members:

- Sometime in mid-June to August: 1–2-day retreat with programming led by UUA staff or volunteer
- August through September-October: meeting weekly or 2-3 times each month for planning and discussion (~8 hours each month), administering the congregational assessment and holding small group meetings/focus groups (~15 hours each month)
- November: evaluating congregational assessment and small group meeting findings, writing the congregational record: (~30 hours)
- December: it's possible for the search team to take significant time off if they work ahead to assemble the documents packet and make plans for interviews and discernment meetings in January
- January: first three weeks are extremely busy with initial evaluation of applicants: read each ministerial record, review applicants' websites, decide whom to interview, conduct interviews and reference checks, narrow list of applicants down to 3 pre-candidates (~40 hours)
- February-March: three full weekends of your team's choice in a six-week period with pre-candidates (interviews, social time, a tour of the church building, and seeing ministers preach in other congregations), plus a week of follow-up and final discernment
- Last week of March: final discussions and rankings of pre-candidates before offer date: ~5 hours
- Early April: planning for candidate week: ~10 hours
- Late April: candidate week activities do not need to be planned or attended by all search team members, though search team coordination and some presence is expected (~15 hours)

Search teams should be deliberate about making the work of search accessible to each member, considering abilities, care-giving responsibilities, work schedules, commutes, technical skills, etc. Some search team members have significant gifts, but fewer hours to give.

Compensation consultation

Staff and volunteers on the UUA's Church Staff Finances team can work with members of boards and search teams as they plan for their compensation package.

Congregational leaders should contact Church Staff Finances (comp@uua.org) with any questions over the summer before a search to get information and recommendations early in the process, rather than later. They can offer advice on salary and housing, benefits, relocation expenses, and best practices as you move into search. They can also 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).

Board members, search team members, and the negotiating team should feel free to contact Church Staff Finances more than once throughout the process.

Search team budget

The governing board sets the budget for the search team. The budget should cover travel and hospitality expenses for three pre-candidating weekends, travel and hospitality expenses for candidating week, a video conferencing subscription, search team 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 team 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 team budget: between $10,000 and 20% of the projected salary and housing amount
- Settled ministry search support: $1,000 - $3,500 (see below)

The Congregational Transitions Director 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 consultation throughout the search process (including search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop for the congregation, and new ministry start-up programming led by regional staff).

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 team 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 Congregational Transitions Director, at cpurcell@uua.org before submitting the form to initiate settled ministry search support (below).

Canadian congregations are not bound by this, though they may have extra costs for search because of the border.

How to request settled ministry search support

The board president initiates UUA settled ministry search support by using this form (due by 01 June). The search support fee covers workshops which support the settled search (search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop for the congregation, and new ministry start-up programming led by regional staff) for a clear arc of support and a streamlined congregational billing process. Once she receives the form and search team availability, the Congregational Transitions Director will assign a retreat leader who will lead the search team retreat programming between mid-June and the end of August.

Early search deadlines

The board president should formally let the UUA Transitions Team know that their congregation will be in settled search in the coming search cycle by completing this form to initiate UUA search support by 01 June. The search team should provide its availability for search retreat programming to the Congregational Transitions Director as early as possible (in May or June). Retreats should be held no later than the first week of September to give the search team time to do its work in the fall.

June search overview

The UUA Transitions Team leads an overview of the settled search process, usually on the second or third Saturday in June, each year on Zoom. Board members and search team members are welcome to participate in this optional overview. A link to a registration form will be on our main webpage a few weeks before the event.

Role of the interim minister

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 or the search, as they recognize that search is the work of the congregation. Interim ministers should support good process in search and provide pastoral support for the congregation during the search process.

Congregational website

Congregations are encouraged to ask for “outside help” regarding their website. Regional staff, interim ministers, or web-savvy people outside of the congregation, for example, could share feedback on 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, a search timeline, and announcements to update the congregation on the process of search.

Confidentiality

A reminder on the importance of confidentiality throughout the process—the search team will be expected to keep the names of all applicants confidential from the congregation, staff, and leadership. They only 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 rare congregations with poor confidentiality practices.

Other ministers in the congregation

The interim minister, any other ministers on staff, retired ministers in the congregation, and any ministers emerit* are bound by UU Ministers Association guidelines in the search process

around collegiality and confidentiality. They often serve as references on 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 team?

This is a conflict of interest. The search team is both independent of 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 team.

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

No. The search team should have the trust of the entire congregation. The search team will be in conversation with the congregation about the needs of groups and committees within the congregation early in the search process. Any search team 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 team members.

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

While they probably could do this if it's in the congregational by-laws, the UUA does not recommend floor nominations. Floor nominations and self-nominations go 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 June, the UUA Transitions Team holds a private gathering open to board members and search team members. If you have board members or search team members who wish to attend, please contact transitions@uua.org.

Christine Purcell, the Congregational Transitions Director, holds weekly open office hours for settled search questions on Thursdays between 3:00 and 5:00 PM Eastern: https://uua.zoom.us/j/91354359680

You may also schedule a meeting directly on her calendar: https://calendly.com/uua-cpurcell

Calendar

Review congregational by-laws	Winter
Congregational Transitions Director provides an overview of search	Feb-Apr
Consultation with UUA Church Staff Finances (review Employer's Participation Agreement on file with the UU Retirement Plan)	Feb-Apr
Approve budget for search team	Spring
Church website update	Spring
Sign up for settled search support	By 01 June
Search team selection	Apr-Jun
Search team reviews Settlement Handbook	Jun 15-July
Search initiated and posted on UUA website	After June 15

Forms and Links

- Getting help with compensation
- General Compensation Information
- Request Settled Ministry Search Support
- Settled search calendar
- Visual Guide: Initiating a Search & Logging into the MinistrySearch System

MinistrySearch System

Once the search team is selected, one member of the team should contact the Congregational Transitions Director to request the initiation of a search in the MinistrySearch system **after 20 June.** Each year, the UUA Transitions Team takes what it learned from the last search cycle to adjust ministerial and congregational record questions. The Search Handbook is updated each year, as well, before the search officially opens on 20 June.

To initiate the search, the UUA Transitions Team needs the name and email address of one search team 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 system access.

Once the first person added to the search system receives acknowledgement that the UUA Transitions Team has initiated the search, they may add other members of the search team into the system using their preferred email addresses. No one other than current search team members should be able to access the search profile. Each search team member will need to

enter the MinistrySearch system and create their own password. Logins and passwords should not be shared amongst search team members.

Discussion prompts

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 team. 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? Note: this has happened.

Can’t Any Minister Serve Any Congregation?

Can any minister serve a congregation? Does it really matter to go through this process? If there is good preaching and good pastoral care, why take all the time to go through the search process? What do we need that is unique?

Phase Three: Building the Structure to Search

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

The most common mistakes search teams 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 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 team when they said ____?” Ministries have ended early because the one story presented by the search team 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 team that can 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.

Support and guidance for search teams

The UUA Transitions Team wishes you well in the search and is here for you through the whole process. Do not hesitate to reach out if something is unclear, if conflict emerges, or if a fresh perspective would be welcome. The Congregational Transitions Director offers weekly open office hours for search team members (*on Thursdays between 3:00 and 5:00 PM Eastern:* https://uua.zoom.us/j/91354359680) and has a calendar management app so you can schedule meeting times outside of the scheduled office hours: *https://calendly.com/uua-cpurcell*. Get in touch whenever you need help!

From the fall until the search ends in May, the UUA Transitions Team sends out regular newsletters with deadlines and helpful tips to all search team members with MinistrySearch system access and ministers who have signed up for search updates through the MinistrySearch system.

Early search deadlines

The board president should formally let the UUA Transitions Team know that the congregation will be in settled search in the coming search cycle by completing this form to initiate UUA search support (including the search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop, and the settled ministry start-up programming) by 01 June. The search team should provide its availability for retreat programming to the Congregational Transitions Director as soon as possible. Retreats should be held no later than the first week of September to give the team time to do its work in the fall.

Search team retreat programming leader

The Congregational Transitions Director will assign someone to lead the search team retreat programming once the search team shares its availability. Former ministerial settlement representatives and people currently serving as "Break Barriers, Build Beliefs" trainers, Hope for Us coaches, and UUA staff lead the retreats. The retreat leader leads only the programming of the search team retreat, and the UUA Transitions Team supports the search team through the remainder of its work.

Search team 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).

The search team retreat/orientation

Once the board has signed up for search support, the search team should provide possible dates for the retreat programming to the Congregational Transitions Director. She will share your team's availability with available retreat leaders and connect the search team with a retreat leader when she has a firm commitment. This can take a few weeks, so sharing the team's availability as early as possible helps. Ideally, the retreat is held by the end of August, though sometimes a date in early September is necessary.

Retreat programming generally takes 4-6 hours depending on the size and loquaciousness of your team and whether your group participated in the mid-June overview of the search process led by UUA staff. The retreat should be scheduled when all search team members can participate virtually or in person.

The retreat leader will offer programming virtually through Zoom. Search team members participating from individual locations is completely fine, and is, in some ways, easier for facilitation and accessibility. If your search team is gathering in-person for the programming, please be sure that you have a monitor of adequate size and a good camera and speakers to make the programming accessible to all participants.

True retreats for search teams were common years ago and are less common now. The search team is encouraged to spend some social or team-building time together around the time of the programming. No effort to build trust and relationships is wasted in the search process. Even if

you do not decide to have a true retreat in a nearby retreat center, a state park, a hotel, or any accessible place where the team can be comfortable, you may gather for a meal or game night to celebrate the kickoff of your search and bond with each other.

Here are some ways the retreat programming can be arranged:

- 2-3 hours on a Friday night and 2-3 hours on a Saturday morning
- 4-6 hours on a Saturday with a meal break in the middle of the day
- 2 weeknight or weekday sessions in a week

The retreat programming/orientation has 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 tasks necessary for the search team's work on behalf of the congregation and choose roles
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. To begin to contemplate how the members will work together, make decisions, and support these decisions as a team

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

- Schedule—how often to meet, and how and when to meet (virtual meetings may be more inclusive for some people juggling work and care responsibilities)
- Expectations about what to share with the congregation and what is confidential
- How identity plays out on the search team, especially when people have identities that have historically been or may be marginalized
- How to incorporate the congregation, board, and interim minister into the work of search

Covenant

All engaged in the search process are asked to enter into a covenant of fair process with each other, our congregations, and Unitarian Universalism (see the covenant section).

The search team chair or their designee will review the covenant with the team, then indicate that the team agrees to abide by the covenant by ticking the covenant box in their search profile. The search team may include a copy of their search team covenant, which is separate from the UUA's covenant for fair process, in their document packet.

Role of the interim minister

An interim minister can be the chaplain to the search team. Often, the interim minister has a brief check-in with the search team (during the first 10-15 minutes of a search team meeting, for example) to provide pastoral support and, if the search team 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 teamwork and the rest of life, current frustrations and joys, and sharing news of recent events in the congregation about which the search team might not know.

Interim ministers can also be a resource for the search team. Interim ministers give useful feedback on the congregational record in the MinistrySearch system. They are good practice partners for mock interviews with the search team. Search team members should not ask the interim minister questions about specific applicant, and the interim minister must not respond to such questions, if asked.

Searching ministers should contact the current interim minister to inquire about the congregation as part of their discernment process. Interim ministers should answer questions they are directly asked. Search teams may ask prospective ministers if they have talked with the interim minister. Interim ministers may tell search teams how many ministers have contacted them.

The interim minister may meet with ministers during pre-candidating weekends if the schedule allows. The interim minister should meet with the candidating minister(s) during 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.

Ministers' eligibility to apply

If your search team learns that a minster who is in relationship with your congregation intends to apply for your ministry position, check out the eligibility rules and policies for inside candidates or previous interns in an earlier section of this handbook: Eligibility for Ministers in Search. The Congregational Transitions Director will be pleased to meet with your team to discuss the additional considerations and timeline impact of fully and fairly considering a minister whom your congregation already knows.

The work of ministerial search

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

The search team needs to decide who will hold certain roles and have oversight over certain tasks, such as:

1. Chair/convener
2. Communications
3. Negotiating team member

4. Treasurer
5. Web specialist
6. Congregational assessment coordinator
7. Small group meetings/focus groups coordinator
8. “Break Barriers, Build Beliefs” coordinator
9. Search profile coordinator
10. Documents packet assembler
11. Interview coordinator
12. Pre-candidating weekends coordinator
13. References coordinator
14. Candidating week coordinator

A note to search teams: 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 team is free to combine and assign the roles in the way that works best for them.

Comprehensive search calendar:

This calendar covers the entire search process from the time a minister announces their plan for departure through the interim ministry and settled search until a new minister is called by a congregation. A more comprehensive description of the work of the settled ministry search team which is organized by roles follows in the next section.

Detailed, role-based description of search team tasks

Some of this information will be repeated in later sections of this handbook. This redundancy is by design, as we wanted to provide both role-based and chronological overviews of the work. This section is to help search team members choose their roles in alignment with their interests and availability.

Chair

The chair or convener of the search team monitors the work and progress of the search team, setting meeting agendas, communicating with the board and interim minister, facilitating meetings, and perhaps acting as a liaison to the Congregational Transitions Director. The chair supports the work of the search team with their tasks, as needed, and initiates (or is copied on) significant communications with the Congregational Transitions Director and UUA Transitions Team.

Some search teams have elected co-chairs.

Timing: *The role requires ongoing work throughout the search process.*

Communications

The communications coordinator is responsible for recording decisions of the search team and for sharing information with leadership, the wider congregation, and ministers. The person with the communications role should share information with the website specialist or congregational administrator to be publicized to the congregation. Often, one person is the minute-taker and decision-recorder for the group's internal records while someone else does the outward-facing pieces of the communication. Any minutes should be deleted and/or shredded at the end of the search process.

Timing*: The role requires ongoing work throughout the search process.*

Treasurer

Most often, this is the person on the search team who takes care of and maintains records of finances, making sure to reimburse pre-candidate and candidate ministers and search team members in a timely way. The board should set up a separate checking account for the search team to maintain the confidentiality of pre-candidates' identities.

Timing**:** *The role requires ongoing work throughout the search process, though most of the work will happen between February and May.*

Website Specialist

Note: This is a public task in many ways and may be filled by a person or persons not on the search team, such as a staff member or a communications volunteer. The communications coordinator(s) for the search team may help with or take on this role, if desired.

The website 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 are 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 team with at least names and a short biography. It is a good idea to share the congregational assessment summary results 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 welcome, 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. Eventually, once the candidate is announced publicly, the web specialist can link to the minister's website.

Timing**:** *Much of this work happens in the first six months of the search process and even before the search team 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: Post search team members' photos and brief bios on the congregation's website.*
- *Late October/early November: Post congregational assessment results summary for congregation to see*
- *Early December or later: post congregational record (whole or summary version) in a members-only part of the website or distributed to members via email, if desired*
- *When candidate is announced: post link to minister's website*

Congregational assessment coordinator

The congregational assessment is an opportunity for the congregation to reflect on the ministry, as it has been so far, and begin to a different future with a new minister. The UUA Transitions Team encourages the search team 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. *In the current political climate, it is wise to consider how to request and store information about identities in a responsible and sensitive manner.*

Before the search team begins the work of surveying and holding small group meetings with the congregation, they should be sure to review all of the questions in the search profile (including the lengthy 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 UUA Transitions Team, in partnership with ministers and colleagues in UU identity groups, have revised the congregational assessment for the 2025 search cycle and beyond. We may update the survey template slightly each year, based on feedback we receive from ministers and search teams. We intended to present an inclusive and thorough analysis tool, and we are open to making the necessary changes. *Please do not use surveys from before 2020 without carefully considering questions with an equity and inclusion lens.*

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

Your search team may use outside help from the congregation in creating, sharing, and analyzing the results of the survey, especially if no one on the team has strong survey or data skills. Perhaps someone on the transition team could be involved. The team can make the survey design as easy as possible to analyze by including few, if any, open-ended questions. Many videos are available on-line to help you with survey design and data analysis.

Once the newly created survey is ready, send a link to the survey to all congregants. Most search teams time the survey to the beginning of the congregation's program year and allow about a month for completion and submission for the survey, with repeated reminders sent throughout the month. A return rate of at least 50% should be the minimum goal, though ideally this will be higher. Once the team closes the survey, compile the survey results and share a summary with the congregation.

Often, the results can be used to spur conversation small group meetings and focus groups. Be sure to share the survey results with the interim minister. The survey results will become part of the documents packet the search team prepares. Summary 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 team may elect to re-use the initial survey results.

Please note there is a separate survey for the Break Barriers, Build Beliefs workshop, which the B4 coordinator can publicize

Timing**:** *Fairly intense work in the late summer through October*

Key dates:

- *Summer: search team creates congregational assessment from UUA survey template*
- *August-early October: Congregation completes survey*
- *Late September to Mid-October: Anonymized survey result summary shared with congregation and interim minister*
- *December: Survey summary included in search documents packet*

Small group meetings and focus groups coordinator

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

Small group meetings are open groups of congregants invited to come to a conversation (generally facilitated by search team members) to provide an opportunity for people to hear and build on what others say. You may call these small group meetings what you like: sharing circles, small group discussions, small group meetings, etc. One memorable search team called their meetings "search parties" and publicized them by dressing for them in rain gear and carrying flashlights when making congregational announcements about them!

One search team found that in its small group 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 search team used only two: "Looking back, after our minister has been with us a year, what will be your measures of a good match? How will we be together?" Other potential good questions could be about the congregational culture and the ministers' role in the culture. One way to approach 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. If some discussion or long-form responses would help the search team with questions which could not be addressed easily in the survey, the small group

meetings are a great opportunity to learn more. Ultimately, the search team takes the lead on determining the questions.

At least one search team member should participate in each of these small group meetings. They can invite other congregants to help with facilitation or note-taking. Use a good process of encouraging all to speak, letting people finish their thoughts without interruption, and setting limits for individual speaking time, though a natural conversation in which people are sharing insights can be generative.

Multiple small group meetings should occur, and search teams may implement sign-ups, meeting size limits, and meeting time limits to aid the process.

Focus groups differ from small group 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 teams, and various committees and task forces, to name a few. The search team would do well to figure out which groups are likely to feel left out if not included.

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

In an ideal search, both the small group meetings and focus groups would occur after the analysis of survey results, so the survey can be used as a springboard for further group conversation. Include a short summary report of the small group meetings (perhaps a page) in the congregational documents packet. The report should highlight the process and observations from these sessions.

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

Key dates:

August: Dates set for small group meetings, advertising begins

August-September: Focus groups planned, scheduling begins with dates, facilitators and notetakers identified

September-early November: Small group meetings and focus group conversations

Mid-late November: Summary report prepared for congregational record and congregational documents packet

Break Barriers, Build Beliefs workshop coordinator

"Break Barriers, Build Beliefs" (B4) is a program that grew from the legacy of "Beyond Categorical Thinking" (BCT) program during the pandemic, incorporating learnings from the UUA's Commission on Institutional Change as published in Widening the Circle of Concern (June 2020). The BCT program began in the 1980s at the request of ministers who found bias and prejudice in the search process. You can learn about the program on our UUA website.

"Break Barriers, Build Beliefs" is designed to help congregations in the ministerial search process. Trainers from the UUA facilitate the weekend program. The workshop addresses

issues around race/ethnicity, gender/gender identity, visible and invisible disabilities and health concerns, and sexual orientation. The UUA and applicant ministers expect that search teams will hold a B4 weekend, and applicant ministers should ask search teams what their congregations learned from the experience.

Congregational members, and leaders, particularly, are responsible for awareness of their personal implicit and overt biases and for countering systemic and personal biases during and beyond the interim period. All search team members, board members, and other people in church leadership should take part in the B4 workshop and strongly encourage all congregants to attend.

The three- to four-hour B4 workshop occurs on Zoom or in-person. There is an additional cost for an in-person workshop to cover travel and hospitality expenses for the trainer, but the cost of a virtual workshop or the trainer's honorarium for an in-person workshop is covered by the search support fee.

The program examines the current biases in our congregations and provides opportunities for congregation members to discuss what they would do if these biases occurred in their congregational setting. Search team members may invite the B4 trainer to lead the worship service during the B4 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 applicant ministers about their commitment to full equality and ongoing learning about anti-racism, anti-oppression, and multiculturalism. 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, compassionately and actively, to challenging bias within the life of the congregation.

Application process:

One person on the search team, the B4 coordinator, fills out the application (with help from staff and leaders). The search team should coordinate with the interim minister to identify available weekends for the programming. The search team will need to list a minimum of two weekend options on the application, though three is ideal. **Please submit applications no earlier than July 15.**

The UUA Transitions Team will assign a trainer or trainers, then make the initial introduction between trainers and search team B4 coordinators. *Identifying a trainer can take weeks, so UUA staff appreciate significant lead time with the application and patience.*

The search team B4 coordinator should check with their trainer about preferred workshop timing and schedule. A virtual workshop is typically held in two equal sessions—one on Friday night and one on Saturday morning/afternoon before Sunday worship. B4s that happen in person should be on Saturday morning or afternoon. The search team should schedule the workshop in person only when a four-hour block is available. Often, there is a meeting between the trainer(s) and the search team at some point during the weekend. Please check with your trainer about scheduling this.

The search team B4 coordinator will receive a link to a Dropbox folder that includes the handouts that need to be printed for the participants. There are also materials for children, if desired, as youth are encouraged to attend the workshop. The B4 coordinator can help to

publicize the UUA's B4 survey (separate from the congregational assessment) which the trainer will use to customize your congregation's B4 programming.

For more information, including the application to request a B4 workshop, please visit the "Break Barriers, Build Beliefs" section of our website. After the B4 weekend is finished, search teams should complete the evaluation.

Notes:

- The congregation should provide someone to set up the meeting space and a technical host.
- If the search team requests an in-person B4 workshop, the UUA will assess an added fee (separate from the search support fee) from the congregation and reimburse the facilitator for all travel and hospitality expenses. The fee structure and information about payment can be found on the application form.
- The search team should provide copy of the B4 application and a summary of what they learned about the congregation from the B4 to applicants in their documents packet.

Timing**:** *Scheduling should happen during the summer after July 15. The B4 workshop should happen anytime from late August to December.*

Key dates:
July to October: Search team completes and submits B4 application

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

September-December: Training occurs

Search profile coordinator

The congregational record (also called a CR, search profile, or application) is in the MinistrySearch system. It is the search team's opportunity to present itself to potential applicant ministers. All search team 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 team member can input answers to questions, and multiple people may work on the record simultaneously. All search team members should have input into the final congregational record before it is submitted to for review and approval for publication. The coordinator may direct and remind team members to complete certain sections, seek out missing information, and/or conduct a final editing pass once the profile is complete.

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 UUA Transitions Team. Information for some responses may come from the congregational assessment, small group meetings, and focus groups; some may come from the collective wisdom of the search team.

Once complete, the search team should invite the interim (or other transitional) minister and the congregation's UUA regional primary contact to offer feedback on the congregational record in mid-November. The Congregational Transitions Director may review the profile and offer feedback on behalf of regional staff if regional staff requests this, or, time-permitting, if the search team requests this. The interim minister and regional staff contact can suggest ways to balance the presentation of the congregation's unique strengths and challenges. Submit the search profile to reviewers for approval in time for them to read it and offer suggestions, and for edits to be completed before the publication date: 01 December. After publication, please make changes to the profile only with the prior approval of the Congregational Transitions Director.

Information from recent, previous searches in the MinistrySearch system will be available to the new search team who may (and probably will) change them. Search teams may email the UUA Transitions Team to request access to records created between 2000-2018, if desired, though the questions in those records were different, and the information in them is unlikely to be very relevant or helpful to the search team.

Some notes:

- Creating the search profile is not an exercise in putting your best foot forward. A search teams sets up the future ministry for success by honestly describing the congregation, not by presenting a snapshot of the congregation only at its best.
- Read all the questions in the congregational record before creating the survey for the congregational assessment or the question lists for small group meetings. *Be sure to note that the questionnaire section is long!* Some search teams have discovered this late in their process, to their great dismay.
- The average length of a completed settled ministry search congregational record is 45-55 pages when viewed using the print/preview option in the MinistrySearch system to generate a PDF (this has a very large font!). We have seen profiles which are as short as 28 pages and as long as 113 pages.

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 there is conflict within the congregation, the record should reflect that. If something has been neglected, the record should say so. That said, every congregation has positive features which should be shared, as well. Ministers are interested in a balanced and nuanced view of your congregation.

The UUA encourages the search team to share the contents of the record with the congregation once approved and published. If elements of the congregational record might cause negative reactions in the congregation, please be in touch with the Congregational Transitions Director to strategize about framing or summarizing the record.

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

Key dates:

Summer: the search team reviews all search profile questions as they prepare for the congregational assessment and small group meetings

Fall: the search team decides how and by whom questions will be completed

Mid to late November: The entire search team completes and reviews the search profile. The team seeks feedback on the completed profile from the interim minister and the Congregational Life staff contact

Late November: search team and regional staff notify the Congregational Transitions Director that the search profile is ready for publication

First week of December: the Congregational Transitions Director publishes all approved search profiles for prospective ministers' review

Documents packet

While the search profile is a series of questions, the documents packet is a collection of supplementary materials. The documents will give applicant ministers concrete information from the congregation. One search team member should take the lead on gathering these documents. Because this is not confidential work, the search team can ask the board or staff for most of these materials. These documents or links to them should be collected into an online Dropbox, Google Drive folder, PDF file, or a collection of PDF files that can be shared with each applicant. If a document in the required list does not exist, please note this in your documents packet and don't worry about it. For example, if your staff does not have a covenant, the search team does not need to compel the staff to make one so it can be included!

The search team will share a link to the documents packet to all applicants as soon as their names are released to the search team the first week of January. *Make certain that the link you will share with each applicant is "view only" and will not list the applicants as people with access to the folder to preserve confidentiality; in other words, this link should allow anyone who has it to view the contents of the folder.* If you are not sure how to do this, test your link before distributing it. You can find helpful guides sharing settings for links on-line. Search teams have reported that it is easier to assure confidentiality when sharing a Google Drive link than a Dropbox link. Most confidentiality issues with sharing documents packet links have happened with Dropbox.

Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox

Required documents:

- Proposed contract (also included in the search profile)
- Contract change form: list how your draft agreement differs from the recommended UUA/UUMA contract. *You only need this if you do not track changes in the draft contract directly* (also included in the search profile)
- Total compensation breakout information/Compensation Worksheet
- Biographies of search team members (if not on website)
- Congregational assessment data summary (and question set)
- Small group meetings/focus groups summary
- "Break Barriers, Build Beliefs" application and any reflections you took away from the weekend experience

- Congregational by-laws
- Policies if separate from by-laws (safe congregation, disruptive behavior, etc., if not on website). Here is info on safe congregation policies: https://www.uua.org/leaderlab/board-policy/what-is-safety-policy
- Previous five years of congregational budgets and end-of-year financial reports
- Annual report shared with the congregation at the annual meeting
- Minutes from last three congregational meetings
- Minutes from governing board over last year
- Job descriptions for each staff member
- Covenant between interim minister and previous settled minister
- Congregational covenant
- Staff covenant
- List of ministers who have regular contact with congregants
- 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

Optional documents:

- Longer report from congregational assessment and small group meetings
- Search team covenant
- Timeline of congregational history
- Link to video tour of congregational building
- Sample information given to new members
- Current long-range plan
- Organizational chart
- Information given to parents on religious education/exploration opportunities
- Anything else the search team wishes to include

Timing**:** *These should be ready to be reviewed by the Congregational Transitions Director by mid-December*

Key dates:

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

By December: Gather documents in an on-line folder

Mid-December: share the link to the documents packet with the Congregational Transitions Director

January: Send a link to the documents packet to every applicant soon after the search team receives their applications

Interview coordinator

The search team will hold interviews at two separate times with prospective ministers. The first set is usually done by video conference after the search team has looked at all applicants and decided whom they would like to pursue further with an interview (mid-January). Generally, these interviews last about an hour to an hour and a half, reserving at least 15 minutes for questions from the applicants. The second set of interviews happens over the course of the pre-candidating weekend (February-March). Generally, the whole team has a three-hour interview with the pre-candidate on Saturday and then a follow-up conversation/interview on Sunday at lunch.

The search team can appoint 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 team does this as a group.

All search team members should participate in video interviews. On occasion, when this is not possible, the session could be recorded, with the ministers' prior knowledge and consent, and shared with the missing team member.

All search team members should participate in pre-candidating weekends (in February and March).

Search teams should standardize some interview questions as a baseline for comparison. Additional questions specific to interviewees and their materials are fine, but the framework should be the same for all interviewees. It is important for search team 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 team and congregation. It's important for a search team to notice which questions applicant and pre-candidate ministers ask.

Search teams set the structure for interviews. They may share questions in advance with ministers as an act of hospitality, if the search team wishes, provided this is done consistently for all interviewees.

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

The UUA Transitions Team supplies some sample questions which you may want to download and consider.

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

Key dates:

December: the search team may hold a mock interview with the interim minister and should reserve some time in January for interviews

December-early January: Search team chooses questions for each interview

Mid-to-late January: Interviews occur

Before first pre-candidating weekend: Search team chooses questions for each pre-candidating weekend

February and March: Pre-candidating weekends occur

Pre-candidating weekends coordinator

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

All search team members should be present for each weekend (search team members should reserve three 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 vespers-style service with just the minister and search team, and a final lunch discussion/interview. Prospective ministers may meet with the current interim minister, other ministers on staff, and affiliated ministers, if they like. They can arrange this meeting directly without search team involvement. Other staff should not meet with (or know the identity of) pre-candidates as they are not bound by UU Ministry Association professional guidelines or the covenant for fair practices/confidentiality in search.

Ministers' spouses should be welcome for the pre-candidating weekend with costs covered by the search team budget, though this is ultimately a decision between the minister and spouse. Children's expenses are not covered by the search team budget for pre-candidating visits, 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 team 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. In recent years, many search teams have had fewer than three pre-candidates

Inviting Pre-candidates

Once the search team has confirmed their pre-candidates (on or after 24 January), they should ask pre-candidates which weekends in February and March they could be free and schedule the weekends accordingly.

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 reserved for the search team and 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 out of the house
- Tour of area
- Vespers-style service with search team
- Don't forget to build in some free time for each pre-candidate!
- Final breakfast, brunch, or lunch and follow-up with search team

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

Scheduling the tour can be problematic if the building is in constant use. Some search teams have simply reserved the building for an hour to ensure privacy. The tour of the area may be done by one or two search team members. The coordinator of this should work closely with the hospitality person to assure a cohesive and productive weekend.

Often, other meals like Saturday lunch and dinner are also with the search team. 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 UUA Transitions Team has gathered tips from search teams which conducted pre-candidating weekends virtually during 2020 and 2021 (the lockdown period of the COVID-19 pandemic). 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 team hosts one pre-candidating weekend virtually, all their 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 team's time, attention, and resources. Any virtual schedule should come from mutual agreement between the search team and the minister.

The search team can offer a tour of the church building effectively via video. One search team did a live tour in a video meeting and the pre-candidate was able to ask questions. A search team could do a virtual building tour, regardless of pre-candidating plans, and include it in their documents packet ahead of time.

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

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*:** schedule p*re-candidating weekends earlier in the process before search team members' calendars fill, often 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 team identifies weekends in February and March when all can be present

Fall-early winter: Congregational building tour time scheduled

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

Hospitality coordinator

The search team 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 team do this. Pre-candidates making their own arrangements should be frugal with what is ultimately the search team's budget. Search teams 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 team, ideally in a reasonably priced and full-featured 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 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 team splits up transportation so that members have solo or paired time with the pre-candidate.

If the minister has expenses for the search team to reimburse, the search team should reimburse these promptly.

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 the search team chooses pre-candidating weekends. Other arrangements should be made as soon as the pre-candidate commits to a weekend visit.*

Key dates:
Fall: Secure lodging arrangements once pre-candidating weekends are set

Mid-to-late January: Make travel arrangements as soon as pre-candidate accepts

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

References and research calls coordinator

Checking references is an important part of the search process. The search team 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 teams. References are the opportunity for confirmation of how ministers depict themselves and for the search team to ask their own questions from their own perspectives. Ministers also do their own research by talking with interim ministers, regional staff, and previous settled ministers. What both search teams and ministers are seeking is congruency. Do congregations or ministers present themselves consistently with how others describe them? Without doing reference checks and research calls, you will never know.

When to Do Reference Checks

Initial reference checks	*Those provided by ministers*	*January, after getting applications*
Developed reference checks and research calls to UUA regional staff	*Done once pre-candidates have been confirmed*	*February-March*
Candidate reference checks (optional and somewhat rare)	*Done once a candidate has accepted offer*	*Between acceptance of offer and candidating week*

Initial reference check

The initial reference check can occur as soon after receiving applicants' materials as the search team would like. Some search teams want to do them immediately to help them decide whom to interview, while others wait until after the first interview. Once a search team has received access to ministerial records, they 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 and appendix. These calls may be done over the phone, video, or via email. The UUA recommends that, for phone and video interviews, if possible, two search team members conduct the reference check. In general, to respect people's time, 30 minutes should be the maximum time allotment for a reference conversation.

While a minister may be a reference for more than one minister, a search team should not ask a minister to compare ministers for whom they are the references. No minister should offer this either. If a minister offers a comparison, the search team should ask the minister to speak only directly about the skills of the applicant in question without comparison.

Search teams should not ask ministers who are not named as a reference for advice in any way about applicant, pre-candidate, or candidate ministers as a minister who responds to such a request could be in breach of UU Ministers Association guidelines.

Ministers should not ask current employees of a prospective minister's congregation to provide references for applicant ministers. 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.

The search team may only reach out to references provided by an applicant minister to preserve confidentiality about the minister's search.

Developed reference checks/research calls

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

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

- someone in the ministers' current congregation or congregation last served. If this is a ministerial internship, the search team 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.
- Additionally, the search team should set up Research Calls with UUA Staff with a UUA regional staff person (CUC, if Canadian) to learn more about pre-candidates. These are not reference calls, as UUA staff cannot provide references for ministers. Regional staff are keen to share what they know about pre-candidate ministers to help your search team look for congruency and find a great match. The search team should ask the minister which staff person knows their ministry best before contacting a regional staff person. If the minister cannot connect the search team with a regional staff person, the search team may reach out to the Congregational Transitions Director to ask if anyone on staff is familiar with the ministry of the pre-candidate.
- Another developed reference option is based on the search team's desire for deeper clarity about a pre-candidate. For example, the search team may have some questions about the minister's involvement in staff supervision, anti-racism work, conflict-transformation, or trust building work, to name a few examples. The search team could ask the pre-candidate, "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 team is free to ask other questions of these developed references, too.

Again, these reference checks may be done via phone, video, or email. The duration of these calls 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 teams should remember that people providing 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 team has matched with a candidate, they have the option to ask the candidate for additional references within the current congregation or workplace where the minister is serving. This final stage of reference-checking is rarely used, but a search team 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 and UUA research calls

April: Candidate reference check (optional)

Candidating week coordinator

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 team and is still looking to the search team for leadership.

The UUA Transitions Team shares three possible models and sample schedules for candidating weeks in the section on phase seven of the search process in this handbook. The primary model is less centered on meeting and greeting committees 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 teams in partnership with the candidate to figure out what makes most sense for everyone.

In all models, the search team 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 team manages the planning and schedule for the week, and all search team 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 team, candidate, congregational leadership, congregation, and area ministers.

During the candidating week, the candidate typically leads services on both Sundays. There should be at least one congregation-wide open session with the candidate. Ministers expect meetings with staff (often as a group, then with individuals), as well as a meeting with the governing board. On Friday before the vote, a short check-in between the candidate and the search team is helpful to talk about how things have gone during the week. Other meetings with affinity groups, task forces, and committees are possible 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 for the candidate, as well as time off each day for restoration and home search. The schedule should be mutually approved by the search team and the candidate.

The search team should be a guide/host at congregational events, but other members of the congregation may assist with planning and execution of plans significantly. Meetings with staff and area clergy are generally left to the candidate, though this has varied from congregation to congregation.

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

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

***Key dates*:**

Late Summer: Search team meets with interim minister to reserve candidating week (usually last week of April to early May)

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

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

Process observations

Most search teams would like to make sure that meetings go as well as possible. Process observation is a great way to assess and monitor how meeting time is being used and how team members are in relationship with one another. Some teams ask one person to do this, while others rotate the role between all members. Another way to approach this is to have a process observation checkout at the end of the meeting when everyone can reflect on 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 had undesirable results 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. Identity-based conflict is addressed unskillfully.
5. People passively hold back concerns until they reach an unproductive level of conflict.

***Timing*:** Ongoing

Negotiating team member

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 board may also ask the negotiating team to recommend compensation (salary, housing, benefits) to the board, though ultimately the governing board is responsible for setting compensation.

Shortly after the congregation elects the search team, the board should appoint a negotiating team, consisting of no more than three people, including one search team member (selected by the search team), 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 will call, 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 worksheet of the breakouts for total compensation for the documents packet.

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

While preparing a draft agreement, the negotiating team should track changes in the draft document itself or list all changes made from the UUA/UUMA recommended contract in a separate document. Changes should be made in a spirit of trust and generosity, if possible, as ministers pay close attention to these changes and what they might signal about the congregation.

The draft employment agreement and the change log (if changes are not tracked in the document itself) will be included in the search profile.

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

Once the candidate accepts the verbal offer from the search team, the negotiating team and the candidate meet to finalize the contract and compensation. Once an agreement is reached, the contract may be signed by fax, electronically, 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 team should not announce the candidate to the congregation until there is mutual agreement on the contract and compensation, the candidate clears the search team to make the announcement (they may have to announce to their current congregation that they are leaving), and the congregation initiates a criminal background check.

Timing: *Fall for generating draft agreement and first week of April for contract negotiation*

Key dates:

By late September, the board and search team form the Negotiating Team

By the end of October: Negotiating team convenes to examine contract and compensation and make recommendations on both to the governing board. It is highly recommended the negotiating team meet with the person who administers benefits to understand how the congregation administers benefits and what the congregation can offer.

By November 15th, the search team will receive the draft contract from the negotiating team.

The member of both the search team and the negotiating team will often act as the go between, anonymously sharing questions and concerns raised by applicants and pre-candidates.

Offer Day 12:01 PM EDT until complete: negotiating team may begin contract and compensation negotiations with candidate—though the negotiating team is expected to keep the identity/name of the candidate confidential until it is publicly shared with the congregation by the search team.

FAQs

Why does the UUA update compensation guidelines in the fall? Do we have to scramble to raise our compensation package if the UUA’s recommendations go up to adjust for increasing cost of living?

UUA Church Staff Finances receives updated information about cost of living in the fall and updates our salary recommendations accordingly. If your geo index (wage category) changes or the salary recommendation goes up while the negotiating team and board is working on the draft agreement, your search team does not need to panic! It’s good to be aware that cost of living and wages are going up in your area (as you are likely aware) and to try to align with UUA recommendations, but if there is a significant change, applicant ministers know that it will take time for congregations to align with new standards. Perhaps you can reduce your range for negotiation so you can have a higher starting salary. We only ask for the low-end figure in your salary range to be advertised in your search materials. ***Do your sustainable best****. If you want*

to offer some explanation for your salary and benefits package, you may do so in the text field in the relevant of the congregational record.

We searched last year and are in search again this year. Which parts of the process do we need to repeat and what do we not need to repeat?

You need not redo the congregational assessment. You might consider doing a couple of updated small group meetings to determine where the congregation is now and reflect on how accurate the data from the congregational assessment still is. Most congregations do not repeat "Break Barriers, Build Beliefs" 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 search should update the search profile and documents packet, as needed, depending upon what has transpired in a year.

Can we give welcome baskets to our pre-candidates?

Reluctantly, yes, though a search team should not feel obligated to do this and the UUA Transitions Team discourages this. If anything, welcome brochures of local attractions and information about the area are the most appropriate offering. Regardless, search teams 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 research on congregations?

Ministers in search are encouraged to reach out to the current interim minister, previous ministers who served the congregations, and the UUA regional staff team member who serves that congregation. Ministers should not reach out to members or staff of the congregation. Indeed, a good question for a search team to ask a minister in an interview is to whom the minister has talked about their congregation (this is a way to gauge interest).

Can our search team see another congregation's congregational record as an example?

If you directly ask another congregation to supply theirs, you may review it.

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

In an effort to make themselves more attractive, they only put their best foot forward, thinking of the search profile 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 beyond our walls" than to say, "We want to grow." "The congregation is still conflicted about Rev. Jess Smith's ministry," is better to say than to say nothing at all about a hard ending. Conversely, a congregation can be too negative about

itself and cause ministers to miss what the congregation has to offer. Balance and authenticity are best.

There used to be "neutral pulpits" as part of the search process. What happened to those?

Until the 2025 search cycle, neutral pulpits were part of the settled search process. For a neutral pulpit, the search team would schedule guest speaking opportunities in the fall for their pre-candidates, then have the opportunity to watch them preach live in an area congregation during pre-candidating visits in the February and March. There were challenges with finding three congregations of the same size and maybe even liturgical style within easy driving distance where the pre-candidate had no connections and where confidentiality could be assured, especially since live-streaming is so common now. Search teams which reserved more neutral pulpits in the fall than they needed in the spring were responsible for filling the unused pulpit, which caused great frustration and stress for search team members. Ministers now almost assuredly have videos of their sermons to share with search teams. The complexity of arranging neutral pulpits and assuring confidentiality around them began to outweigh the benefit, so the UUA eliminated the recommendation for neutral pulpits in the 2025 settled search. Instead, we recommend that ministers lead a vespers-style service for the search teams with whom they pre-candidate. Doing so provides a search team with a perspective on the minister they would not likely be able to gain in any other way.

Why does the congregational assessment template ask about congregants' finances? This feels intrusive.

Since the assessment is anonymous, UUA staff hasn't heard about much pushback on including financial information. Ministers want socio-economic information to help them understand the congregation's context. For example, there was one congregation in search recently with mainly extraordinarily wealthy congregants…and yet they struggle to fund their budget every year and are not offering fair compensation to all staff members. The first thing they do when they think they have a deficit budget is to cut staffing. This gave applicants something to consider about the culture of the congregation. A minister with experience nurturing a culture of generosity could do well there. A congregation which has a mix of working-class and wealthy members has interesting diversity and may have done some good cultural work around inclusion (or perhaps control and influence are held in a less favorable way).

How many congregations find a match in the settled ministry search process each year?

In the last several years, the average has been 75-90%. In 2025, the match rate was 54%. Ministers in search hunkered down a bit and changed their search plans, mainly due to rapid cultural change in the US which began in January of 2025.

Calendar

Search team retreat with UUA volunteer retreat leader	Summer at end of first year of interim ministry
"Break Barriers, Build Beliefs/B4" application	July-September
"Break Barriers, Build Beliefs /B4" workshop	September-December
Congregational assessment	August-early October
Negotiating team selected	August-September
Small group meetings/focus groups	September-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/search profile	finished by mid-November
Compensation worksheet	Due to UUA Transitions Team by Nov 30
Congregational record released	if approved, December 1
Documents packet	finished by mid-December

Forms and links

- Settled search calendar
- Congregational Covenant
- Ministerial Covenant
- "Break Barriers, Build Beliefs" (B4) program information
- Blank Ministerial Record
- Visual Guide: Steps to Completing the Congregational Record
- A Guide to Process Observation (from UU Regional Lead Rev. Dr. Ian Evison)
- Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries (Word)
- Contract Change Form
- Compensation Worksheet

MinistrySearch system

Once the search team members have received access to the MinistrySearch system after June 20th, each person should tour the system to gain familiarity with the dashboard and the congregational record questions (especially the lengthy questionnaire section). Some responses will be automatically filled from data provided yearly to the UUA for membership certification (staffing, membership, and finance information)

Some responses are also carried over from previous ministry searches and are provided for informational purposes or as a starting place; the search team is free to alter the responses to these questions.

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

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

Multiple search team members can view the congregational record simultaneously, but we caution folks against editing the same section simultaneously as you run the risk of saving over each other's changes. 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.

Discussion prompts

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 wages and costs of living. From this geo index scale, congregations can determine a range for salary and housing (housing is just a tax benefit on some salary for ministers). Check on your congregation's geo index scale and salary recommendations. What is the range recommended for your congregation? Are you currently compensating fairly? If you are below the minimum, the search for ministry will likely have few applicants. 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?" Does your congregation adequately pay everyone on staff or prioritize the minister's compensation (please do NOT!)?

As a search team, 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 must 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 UUA's Church Staff Finances team (comp@uua.org) for help in thinking through these issues.

Theology on congregational assessment

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?

"Break Barriers, Build Beliefs"
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.)?

Consensus versus majority
Search teams 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 even if it isn't their preferred option?

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

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

	S.C. member	*S.C. member*	*S.C. member*	*S.C. member*	*S.C. member*	*S.C. member*	*S.C. member*
Precandidate AZ	*A*	*A-*	*C-*	*B+*	*A*	*A-*	*A-*
Precandidate BY	*B+*	*B+*	*A-*	*B+*	*B*	*B+*	*B*
Precandidate CX	*A*	*A+*	*A+*	*B-*	*B-*	*B-*	*A+*

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

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

When there's only one person…
A dynamic on the search team can happen when there is one person on the team who holds an identity different from the rest of the team. 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 team do to make sure that people, their identities, and thoughts are welcome and valued?

Phase Four: Opening the Search

Opening the search means all of the search team's hard work is about to be put on display. All feel excited, vulnerable, and hopeful. It's a key moment for the Congregational Transitions Director to work with search teams and for ministers' colleagues to be present to ministers planning a search. It is important to acknowledge this moment, appreciate all the hard work that gone into the search process so far, and shift from preparation to mutual discernment. There is a natural shift in the energy of the search, at this point.

Search teams should take as much of a break as they can in December because the first three weeks of January are very busy! There are a few key deadlines in January, and they exist to promote fairness and clarity for all.

How to complete and publish the search profile

Visual Guide: Steps to Completing the Congregational Record (this guide shows where buttons are, but the process below has been updated and is correct)

1. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the profile. This is the person search teams will ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or UUA Transitions Team, not to regional staff.**
2. Regional staff and potential applicants access the congregational records in the search system, not through emailed documents.
3. While you can download the questions from the search system for off-line reference, you should either work on your search profile in the system and save as you go or be prepared to do a lot of copying and pasting before requesting that regional staff review your profile. If you insist on working in a separate document, please make sure to clear formatting before pasting text into the search system to avoid unexpected formatting and save issues.
4. Fill out each section of the search profile/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.
5. Once each section of the CR is complete with a checkbox next to the section title on the dashboard, and the search team feels that the CR is ready for review, click the large, pink "Complete Record" button at the bottom of the dashboard. *Clicking "Complete record" pushes your changes to the version of the document which regional staff (and, eventually, potential applicants) will see.*
6. Click the "Submit for Approval" button in the yellow box in the middle of the dashboard. The status will then show as "Awaiting Approval." This will allow regional staff, when asked by the search team, to review the profile, viewing the most current version of the profile in the MinistrySearch system.
7. The search team should generate a PDF of the CR (using preview and print options) to share with the interim minister. Regional staff can access the CR through the MinistrySearch system, so a PDF is fine to send but not necessary. Ask your reviewers to offer feedback on your profile.

8. Once the profile has been reviewed and any changes made, please let the Congregational Transitions Director know that it is ready to be published.
9. 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 UUA Transitions Team members in early December.

Review of congregational search profile

Once the search team finishes the search profile in mid-November, they should solicit feedback on the profile from the interim minister and regional staff. Potential applicants are likely to ask the interim and regional staff about your congregation's ministry needs. Interim ministers and regional staff are aware of the congregation's history and patterns in unique ways. They can help the search team by reflecting on the congregation's unique strengths and challenges in the search profile. They may ask questions or suggest clarifications, but do not generally have the ability to delay the release of the record unless the search team failed to disclose something key which applicant ministers should know (serious conflict, history of misconduct, etc.).

Once the interim minister and regional staff provide feedback on the congregational record, and the search team makes any adjustments they would like to make, based on that feedback, the search team should let the Congregational Transitions Director know the record is ready for her review and publication. Reviewed and approved records are made visible to searching ministers in the first days of December (see calendar for exact dates).

The search team may share the search profile with the congregation *once it is published* if the search team so chooses. If there is something in the profile which could be upsetting or triggering for congregation members to review or relive, the team could issue a summary version of the profile which focuses on expectations of the minister and the congregation's needs and hopes. Be sure to promote the understanding that the profile was informed by broad congregational input and is not open for individual editorial input.

Changes to the search profile may be made after publication with the approval of the Congregational Transitions Director.

Review of ministerial record/search profile

While there is no official approval process for ministers' search profiles, searching ministers would do well to have several trusted colleagues review their profiles before release for edits, suggestions, and questions. They should ensure that links work as expected. The most common errors noted by search teams are grammatical or spelling errors and mentions of the "wrong" type of ministry search (when a minister applied for another type of ministry and did not adjust the description of the type of ministry they are seeking before the current application. Search teams should know that ministers only have one search profile and may be applying across different types of ministry search.

While searching ministers may click "submit MR" to indicate interest in the MinistrySearch system for a congregation while their ministerial record is still incomplete, they must complete and finalize their profile before 02 January. The UUA Transitions Team cannot release

applicants to congregations when ministers' profiles are not complete and finalized. Please email transitions@uua.org with any questions about finalizing the ministerial record.

The timing of the publication pf congregations' search profiles and the release of applicant names to congregations gives ministers one month to review profiles and research congregations. Research may include talking with the interim minister and previous ministers to the congregation.

The UUA encourages all searching ministers to read all congregational records, even those they have no interest in serving. There may be a surprise gem out there! Even if ministers don't change their minds about where to apply, they may gain insight or clarity about the congregations to which they intend to apply by comparison.

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 search team should send the documents packet link to the Congregational Transitions Director for review. This is required for receiving applicants on 02 January. The search team may schedule a consultation with her as a team or individual team members may drop into her open office hours sessions in December for a preview of the discernment phase of the search.

The release of applicant names

Ministers read congregational search profiles and apply for opportunities in December. The UUA Transitions Team releases the names and search profiles of interested ministers to search teams on 02 January.

Each member of a search team will receive an automated message from the MinistrySearch system when new applicant information is available. Each minister will receive an automated message from the MinistrySearch system when their information has been shared with a search team.

The initial list and screening

Once the search team gets their initial list of applicants, the team should acknowledge receiving each application via email, send the view-only access link to the documents packet link to each applicant, request a link to the ministers' website (if this information is not included in the ministerial record), and request the initial set of references (if these are not provided on the minister's website).

Ministers should acknowledge receipt of the email, including in their response a link to their website or YouTube channel and a list of references, if they have not already shared these with the search team through their search materials.

Reviewing ministerial applicants

The UUA Transitions Team encourages search teams to review applicant ministers' search profiles and websites before making decisions and/or requesting meetings. Search teams with more interest may need to develop a strategy for how to be as thorough and as fair as possible, given the amount of material received.

Before reviewing applicants' profiles, search teams should remind themselves what the congregation identified as the highest needs of the next ministry. Start with the question, "Could this be our next ministry partner?"

Additional ministers

While the search team will receive most applications on 02 January, the UUA Transitions Team will continue to release names of interested ministers for two weeks until 16 January. If a search team is interested in continuing to receive names after 16 January, the search team should email the UUA Transitions Team with that request. Ministers wishing to apply to a congregation after January 16th should confirm via email with the UUA Transitions Team that the search team is still accepting names. The application cutoff for evaluation is when pre-candidate invitations are made. Names released after the 16th should be considered in time for pre-candidate invitations on 23 January.

Limits for ministers

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

Keeping the congregation informed

Messaging should be high on hope and low on detail at this time in the search process.

The congregation can know of the search team's process, that your record is live, that you've received names of applicants, and that you're hard at work. The search team should not tell them anything about the applicants. For example, search teams should not share something like "Only folks who are new to ministry have applied" 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 search profile 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 search profiles. Some ministers know where they will apply, others need to do more research. The UUA Transitions Team would rather reward thoroughness than speed in the minister's deliberation. This also allows search teams which are running a little behind schedule, for whatever reason, adequate time for their materials to be reviewed.

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

They should not reduce compensation, increase minister's duties, or decrease the minister's authority without discussing their planned changes with UUA Transition Team staff. If they want to add a small detail or correct spelling or punctuation, they may do so and let the UUA Transitions Team know which changes they have made.

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 or sermon video links and initial references if that information is not already provided in the provided search materials. Send them your documents packet link (remember, view-only access to protect confidentiality). Let them know when you're meeting and when you hope to do video interviews. 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 by the first day we can send pre-candidate invitations (23 January)." Then, if need be, let them know of adjustments, especially if you are struggling to identify your top applicants in time to extend pre-candidate invitations on 23 January. Letting them know is a courtesy, but will not cause them to wait for you, as they may confirm the three pre-candidate slots for which they are eligible on 24 January.

Are there ministers who are ineligible to apply?

Yes. Ministers removed from fellowship, on a hold from search, on settlement restriction from the UUA Transitions Team, and ministers who are not UU are held out of the search process. Additionally, if a minister served the congregation as an intern or interim, 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, to share the view-only access link to your documents packet and thank them for applying. If a search team or minister decides not to continue with one another, then please let the other know as soon as possible. For search teams, you can send a message through the MinistrySearch system (click "Dismiss," then create an email on the subsequent page). Ministers may send an email to the search team, thanking them for their consideration and letting them know they are withdrawing from consideration.

Calendar

Review of congregation's search profile by interim minister and/or regional staff and Congregational Transitions Director	Late November
Congregational records published	First week of December
Review of documents packet	Mid-to-late December
Congregational Transitions Director consults with search team on the discernment phase	December
Names of ministers released to search teams	January 2nd
Search team acknowledgement email	Early January
Last day names released to search teams without permission to extend	January 16th

Forms and links

- Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations
- Settled search calendar

Discussion prompts

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? 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? 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 profiles 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

As mutual discernment begins, search teams and ministers do well to remain grounded in what they set out to do in their searches, remain hopeful, act inclusively and with kindness, ask good questions, and explore the possibilities with an open mind. Doing so decreases the chance of desperation and poor choices.

The UUA Transitions Team has watched search teams base their entire ministerial search on one unspoken question: Who's not going to fire the music director? Who's not going to ruffle the feathers of the most vocal people in the congregation? Who's the most charismatic speaker (overlooking general steadiness and skills in other aspects of the ministry entirely)? Ministers have done the same, though with different questions.

Focusing on the possibility of not finding a match can lead to poor choices. There are no guarantees, and there shouldn't be, about the search process. Not finding a match by a certain date in a single search cycle does not negate the hard work a search team 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 outcomes 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 UUA Transitions Team has watched both ministers and congregations be too picky or not picky enough. They've witnessed what they thought were unfavorable choices turning out well. They've assured themselves that a particular mutual selection is what both the congregation and minister needed next, and the ministry lasted only three years.

That said, hard work generally pays off. Ministers who have done their homework know their skills and 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 teams should practice kindness and gratitude with each other and with applicant ministers. Ministers and search teams would do well to remember that not only is the minister looking for a ministry, but they are also 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 team could select a minister is by seeing how the minister does ministry with the search team.

Search teams should not seek a savior or a rockstar. They are seeking a good partner for the next chapter in their ministry. Ministers who enter the search process expecting a perfect congregation that is going to love and appreciate everything they do and follow every suggestion they make (because the minister does know better, after all!) will face some harsh realities.

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

Initial list and screening

When search teams receive applicant materials, each search team member should read all ministerial search profiles and look at all applicants' websites. 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 MinistrySearch system sends automated emails to all search team members when new applicants express interest.

Visual Guide: Release of Ministers' Names

While every search team may devise its own screening process, the UUA Transitions Team recommends each member of the search team simply make a yes, no, maybe list of all the applicants, answering this simple question, "Could this person be our congregation's minister?"

When the search team gathers to discuss applicants for the first time, members should compare their lists to understand where they have alignment and where there are differences of opinion.

The UUA Transitions Team believes strongly that differing opinions present a great opportunity for the search team. 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 team. Asking, "What lens did someone have that others did not?" 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.

In general, the UUA Transitions Team 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 have hope and find joy?)

Search teams and ministers should not fixate on one match possibility at this early stage in mutual discernment. Most search teams have several applicants, and most ministers apply to a few congregations. One of the more common errors in mutual discernment is for the minister or search team to assume that the congregation or minister is looking for only them. Another common error is to rush through the process and assume that the first interest is their best interest while discounting other options. Some search teams are so fearful of getting no minister that they struggle to find a minister who can serve them well. Some ministers do the same. One pre-candidate reported one year that a search team was so enamored with the first pre-candidate it had seen the week before, that the team spent more time talking about the other pre-candidate than they did to them during this pre-candidating weekend.

Manners

- Often, the greatest kindness in search is timeliness. Acknowledging interest and the receipt of materials, keeping people informed of timelines, responding to email, being on

time for video interviews, being gracious in the face of last-minute changes—all of these matter in the search. Timeliness, however, does not equal immediacy.

- Avoid acronyms in written communications with others in search communications. Most people outside of a congregation do not know other congregations by acronyms. Please list city and state/province in communications.
- Understanding good manners is not the same across cultures, regions, and identities. Do not assume your understanding of manners matches everyone else'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 notify a minister or congregation that you will not continue to consider them. It also allows you to create your own message. Please use the dismiss button in the system for this purpose.
- Remember that this is not a corporate or academic hiring process. This is a ministry search. It is designed to help ministers and congregations find each other in a hurting and chaotic world so that our congregations may be places of hope, care, and transformation. Treat each other well with this awareness in mind.
- The UUA Transitions Team is available and willing to listen if you need to vent about frustrations or share stories of hurtful interactions.

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.

Protocol for dismissing applicants

Once the search team has met and has begun its discernment process, they should notify ministers whom they know they will not continue to consider about their decisions. They can do that in the MinistrySearch system. They have the option in the MinistrySearch system (using the "Dismiss" button) to send a standard or customized note thanking the minister(s) for their interest, saying the search team is not continuing with them, and wishing them well in their search. 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 team know sooner rather than later.

Video interviews

Search teams schedule video conference interviews with applicants as they move toward identifying pre-candidates. Usually, these interviews take about an hour with time for questions from both the search team and minister. All search team members should make every effort to be present, though in an emergency, and with the minister's prior consent, the search team may record video calls. Questions should be consistent for each minister, though answers may prompt differing follow-up questions. Generally, these interviews happen in mid-January.

References

Most search teams ask for references as part of their initial email to applicants. Some search teams ask prospective ministers for initial references when they invite them for a video interview.

Searching ministers should 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, or earlier if they have concerns which should be addressed before committing to pre-candidate.

See the longer section in Phase Three on references for more detailed information: References and Research Calls Coordinator

Pre-candidate selection

Most search teams reserve three pre-candidating weekends in the hope that they will have three ministers accept their pre-candidate invitations. When deciding on the ministers to invite to pre-candidate, the search team should remind themselves what the congregation told them was most important in considering ministers as a guide for their deliberations. While alignment between search teams and pre-candidate is often mutual, sometimes a ministers may turn down an invitation to pre-candidate because they felt they had better alignments elsewhere (and are limited to three choices) or simply because they've decided that a congregation is not right for them at all. For this reason, search teams with enough suitable applicant to do so should decide if there are additional applicants they would invite to pre-candidate if one of their top three choices turns them down.

The search team may send out initial pre-candidating invitations by email on January 23rd (and not before). These invitations can be extended after the 23rd, if a search team simply needs more time, though they may miss out on their preferred choices by delaying. Search teams would do well to let all applicants know a timeline if they are going to extend invitations after the 23rd. They should not attempt to keep ministers in reserve who are not in their top three choices by claiming that they need more time, in a spirit of fairness to other search teams and ministers. This would not likely be effective as a strategy, anyway, as ministers are likely to move forward with the invitations they have rather than waiting for an invitation which may or may not come. Applicants may accept pre-candidating invitations at any time on or after the 24th. If a minister declines an invitation, the search team may move down its list to invite another minister who could be a good choice for the congregation.

Searching ministers are limited to three pre-candidating weekends. The UUA Transitions Team recommends giving the minister a three-day window to respond to the request to pre-candidate, though responses on the 24th are common. This allows a searching minister time to do final discernment about the possibilities ahead of them. At the end of three days, if the search team has not heard from a minister, they may decide to move on. Once ministers have agreed to be a pre-candidate, they should not back out to go to another more desired congregation.

Once the search team confirms its pre-candidates, please send the other ministers an email through the MinistrySearch system to let them know you are moving forward with other ministers using the “dismiss” option. Applicant ministers may do this, as well.

Ask your confirmed pre-candidates which of the pre-candidate weekends you have reserved would work for them, then schedule the weekends accordingly.

Once the search team has its pre-candidates confirmed, please let the UUA Transitions Team 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 team has selected all its pre-candidates, they should request an interpretive file summary for each minister from the UUA Transitions Team. An interpretive file summary is 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 status of the minister with the UUA.

Search teams should submit these requests at least 10 days before a weekend visit. The file summary 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 before the visit, the summaries are sent to the search team.

The file summary is a confidential document which is only for the search team and not for public consumption, even if the pre-candidate becomes the candidate.

Often, the file summary tells the search team 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 team.

Pre-candidating weekends

These weekends include a three-hour interview, a tour of the congregational facilities, a tour of the area, a vespers-style service, and a final breakfast/brunch/lunch interview. The UUA Transitions Team recommends other social meal gatherings during the weekend, as well. Pre-candidate spouses are welcome during this weekend visit at the expense of the search team at all the events of the weekend except for the interviews. Expenses may be pre-paid or reimbursed and are the responsibility of the search team.

Developed reference checks

Once the search team has selected its pre-candidates, a second round of reference checks begins. 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 team could and should now ask to speak to:

- someone in leadership in the ministers' current congregation or congregation last served. If this is a ministerial internship, the search team 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. If no one in the minister's current congregation knows about their search, they may not be able to provide a reference there. In such a case, the research call with regional staff takes on added importance, and the search team will want to make some additional reference calls once this minister, if offered candidacy, announces their departure to their current congregation.
- Another developed reference option is based on the search teams desire for deeper clarity about a pre-candidate. For example, the search team may have some questions about the minister's involvement in staff supervision, anti-racism work, conflict-transformation, or trust building work, to name a few examples. The pre-candidate could then be asked by the search team, "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 team is free to ask other questions of these developed references, too.

Pre-candidates should not ask current employees in the congregation they presently serve to provide references for them. To avoid putting any employee in a complicated spot by providing 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.

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 search teams do two to four checks.

Reference questions should be consistent across the board. Search teams 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.

Research calls with UUA staff

The search team should set up research calls with UUA regional staff (or CUC, if Canadian) to learn more about their pre-candidates. **These are not reference calls, as denominational staff do not provide references for ministers.** Regional staff are keen to share what they know about pre-candidate ministers to help your search team find a great match.

The search team should ask each top applicant minister which staff person knows their ministry best before contacting a regional staff person. If the minister cannot connect the search team

with a regional staff person, the search team may reach out to the Congregational Transitions Director to ask if anyone on staff is familiar with the ministry of the applicant.

Research calls are part of the due diligence of the search team. They are one of the main ways the UUA shares information about ministers with search teams. There is value in confirming the perception your team has formed about your top applicants…or in hearing stories which challenge those perceptions. Ministers and ministries are multi-faceted and cannot be reduced to a single narrative. The view of someone on regional staff can be somewhat limited, and forms only one piece of the puzzle. You may receive a great deal of information from research calls, or you may simply hear, “I have no red flags about this minister for your ministry opportunity.” You may leave the call with ideas about new references to request or questions to ask of your applicant, or you may simply feel more confident in your team’s perceptions of an applicant. Soliciting more perspectives will help your search team select a good match for your congregation.

Before asking questions of the regional staff person, please plan to share a bit about your congregation’s culture, needs, and context, especially if they are not familiar with your ministry.

Sample questions:

- How do you know our applicant? Have you worked with them directly? In what timeframe?
- These are the goals for the next ministry partnership our congregation has identified: [list goals, or ministerial qualities or skills]. How do you see this applicant aligning with these goals?
- Should we know about any other great qualities or growing edges?
- Do you have any concerns about their ministry, especially given what we have shared about our congregation? *Please note that if you learn something which surprises or disappoints you from regional staff, your team has not made a mistake in evaluating a pre-candidate as a potential match for your congregation. You may hear about behaviors or patterns that could cause concern or make a minister a poor choice for your congregation which do not rise to the level of misconduct, but about which your search team should be aware. Some examples: authoritarian management or communication style, resistance to accountability, poor boundaries, conflict avoidance or lack of skill in conflict transformation. You may also hear about the work a minister tried to do in a congregation which was not receptive to their efforts.*
- Can you think of a type of developed reference we should be sure to ask this applicant to provide? *This could be someone who could speak to the applicant’s approach to a particular element of ministry (worship, pastoral care, promotion of inclusivity, administrative functions, etc.).*
- Are there others on UUA regional staff we should contact?

Deal-breakers in ministerial agreements

During the pre-candidating weekend, the search team 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 teams or ministers, but there should be no lingering questions when rankings are due or surprises at the point of verbal offers or at the negotiating table.

Discernment

Once the pre-candidate weekends are complete, both search teams and ministers should begin their final discernment about their options.

Search teams and pre-candidate ministers should spend the last week between pre-candidating and submitting rankings to the UUA on discernment and follow-up. Did someone say something unclear or something which shifted your perception of a possible match? Follow up with them or find a way to get more information within the confidentiality guidelines of the search process.

Rankings to UUA Transitions Team

Search teams must not communicate to any minister their intention to name them as a candidate before offer day. Ministers must not communicate their intention to accept an offer from a congregation before offer day.

If search teams or ministers finish pre-candidating weekends early in the pre-candidating window and they are ready to do so, they may submit their rankings early. Ministers and search teams are free to continue contact with each other during this time, especially with follow-up questions that remain after pre-candidating, with the reminder that you may not offer or accept a position before the actual offer day.

By Monday (11:59 PM local time) at the end of discernment week, the UUA Transitions Team would like from **every** search team and **every** minister a ranked list of your choices. **Search teams and ministers should share their yes (ranked), maybe, and no lists with the UUA Transitions Team using the appropriate form below.** The form also asks ministers and search teams whom folks contacted to learn more about potential matches and to identify any tied choices.

Search teams should decide which ministers you would welcome to serve with you, whom you might still consider, and whom you would definitely not select. For ministers, share the yes/maybe/no choices for congregations with the yeses in order of preference.

Ranking forms:

- For ministers: https://uua.wufoo.com/forms/ministers-ranking-of-congregations (you may include any developmental or contract positions for which you are in consideration with settled positions on this form)

- For search teams: https://uua.wufoo.com/forms/search-committee-ranking-of-precandidates

The UUA Transitions Team asks for search teams' and ministers' lists to gauge how things are going to play out and to try and make the overall process smoother and less anxious for all. The day before offer day, the UUA Transitions Team lets everyone know what will happen on offer day based on the rankings.

Here's an example of the matching process: if Rev. A and congregation X identify each other as mutual first choices, it's a match! If Rev. B identifies congregation Y as their first choice, and congregations Y and Z both identify Rev. B as their first choice, Rev. B has a match with congregation Y. The UUA Transitions Team would then check for an alignment between congregation Z and their second choice. Occasionally, the ranking is more complex to sort through.

The time between submitting the ranking form and hearing from the UUA Transitions Team about a match may feel longer than you might expect. *We share information as soon as we have it during offer week, usually the day before offer day.* Ministers and search teams with mutual first choice alignments and folks with no possibility of a match may hear their news earlier because these announcements are simple and obvious. When we're matching tied first choices or second or third choices, we ask folks to confirm that they are still enthusiastic about moving forward before notifying the other party. UUA Transitions Team staff also meet with parties whose highest alignments they ranked as maybes and folks who submitted tied rankings to support their discernment before offer day if their revised ranking would make a difference.

All the searches are linked and interrelated, as the result for one party may depend on choices others have made. *UUA Transitions Team announcements depend upon the timing of ministers and search teams confirming that they are happy to move forward with their tied first choice or second or third-ranked yes before we inform the other party...and inform all the ministers and search teams whose matches depend on whether this alignment works out. Please plan to be responsive to inquiries from the UUA Transitions Team in the days before the offer date.*

Once we have complete information, we can say to each search team and minister before offer day:

- You will be very happy on offer day when you reach out to (or hear from) your first choice, _____!
- It looks like your first choice has a different alignment, but your next option is available. Are you still good with this option?
- 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.
- Nothing is going to work out; let's talk about what comes next.

The UUA Transitions Team will not meddle in this process. We do not make matches; we tell everyone which matches have naturally aligned. While the UUA Transitions Team wants all congregations and ministers to have a match, we commit to fairness, good timing, and honesty as your ranking lists dictate outcomes.

Offer day

A search team may extend a verbal offer to their match at or after noon EDT on the offer day identified on our search calendar. Search teams may also reach out to pre-candidate ministers with whom they have not matched to wish them well, if they would like to do so.

FAQs

We can't decide between two choices. What should we do?

Search teams should review the results of the congregational assessment and small group meetings that gave them direction about what the congregation needs in the next ministry. If a tie still seems unbreakable, talk with the Congregational Transitions Director or UUA Transitions Team staff, who may offer suggestions or clarifying questions. Ministers unable to decide should consult with family, colleagues, and the UUA Transitions Team. as well. You may submit a tie on your rankings, but we may have to ask you to break it if your tied options ranked you the same.

One of our pre-candidates dropped out of consideration. Can they do that?

This is rare, but it does happen. If they have absolute clarity that a ministry with your congregation will not work out for them, they may drop out of consideration. Sometimes a minister has changing care-giving needs, a family or health emergency, or a spouse with changing employment needs and they might need to drop out of search. Historically, this has been uncommon, but it happened in several cases in the 2025 settled search process.

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

That's true, and any restrictions came out of desire to increase fairness and reduce chaos for everyone. At one time, there was no offer date. Search teams could simply make an offer, and that often happened after the first pre-candidating weekend. Other search teams and ministers cried foul. To even the playing field, we created an offer date.

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 end when a search team 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 search team who thought it had its first choice. That one change of mind had a ripple effect on the search, 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 UUA Transitions Team asked for a finalized ranking list by Monday prior to the offer day. To date, that has worked better for all, though it's still very hard 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 our rules.

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 teams would do well to have a pastoral conversation with the interim minister, the Congregational Transitions Director, or the UUA Transitions Team. 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 teams	January 2
Last date to expect names (search teams 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 23rd and beyond
Pre-candidating offers accepted	January 24th and beyond
Interpretive File Summary Request	10 days before 1st visit
Pre-candidating weekends	Weekends in February and March
Developed references (including UUA staff)	February - March
Ranking List to UUA Transitions Team	1st Monday after discernment week (week after 7th pre-candidating weekend
Offer day	1st Thursday after rankings are submitted, 12:00 PM Eastern

Forms and links

- Settled search calendar
- Visual Guide: Release of Ministers' Names
- Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox
- Sample Interview Questions for Search Committees and Ministers (xls)
- Government Reimbursement Rates for Mileage

Discussion prompts

Appearing “ministerial”
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?

Standards
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

At this point, your search team has made an offer and your candidate minister has accepted it! 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 team and candidate. Still, it can also be a bit of a treacherous time, especially if elements take longer or prove problematic in some way. Misaligned expectations in 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 goodwill are needed for all.

Contract negotiations

As soon as the candidate minister accepts the verbal offer on offer day, the candidate may be turned over to the negotiating team. Ideally, major deal-breakers were discussed and resolved in the pre-candidating phase. The negotiating team and candidate should discuss any areas needing negotiation, listen well to one another, and move forward toward a common resolution of the agreement 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.

The candidate and negotiating team should agree on all terms of the employment agreement prior to candidating week.

The Church Staff Finances team can be a valuable resource for specific questions.

Requesting major changes to the employment agreement during negotiations is rare and would represent a breach of trust.

Criminal background check

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

Receiving the report can take anywhere from one to four weeks. The background check only needs to be initiated to move forward with candidacy; surprises are extremely unlikely!

Congregations should only do the criminal background check and sex offender check. Credit and motor vehicle checks are out of bounds.

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 teams are eager to announce the candidate.

The announcement that the congregation has a candidate, 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 released their signed agreement to do a background check.
3. The minister, if currently serving a congregation, has informed the congregation of their candidacy and is ready to make an announcement to the congregation where they are the candidate.

The announcement of the candidate's name must wait until all the conditions above are met. Once completed, the search team and candidate should agree that the announcement can be made and what information about the candidate can be shared (website is standard). The minister may want to make a brief greeting video to be shared as part of the announcement.

For ministers currently serving a congregation

Ministers currently serving a congregation must let their congregation know they are a candidate elsewhere. 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 in planning to meet their future ministerial needs.

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

FAQs

Why can't we do credit checks?

Credit checks are not essential for good ministry and are invasive in ways that can lead to unnecessary judgments. Ministers generally don't ask for a credit check from 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?

Extremely unlikely. Chances are you'll know anything that comes up if you've requested a file summary of the minister. Even then, most 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 hiring procedure for religious professionals and key volunteers.

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 fellowship 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?

Such a delay would hamper the congregation's interim minister selection. It takes about two weeks to prepare the search profile for an interim ministry search. Since most candidating weeks are late April and early May, that means the congregation's search for a minister would miss the interim search. The minister should make sure they are giving the amount of notice of their departure that their current contract requires.

Calendar

Negotiating team and candidate work out contract	Right after offer is accepted
Initiate 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 the 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)

Discussion prompts

Case Study

Our candidate is 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/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: Beginning a New Ministry

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 intentionally 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 beginning a new ministry, the congregation and its search team have made a great deal of progress and done a great deal of work.

The congregation has placed a lot of trust in the search team, 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 team for leadership. As much as eyes and ears are on the candidate, they are equally on the search team, whom they know better.

After candidating week is over, the start of a new ministry will coincide with the end of the current transitional ministry. This will open a new chapter for the congregation.

Candidating week

The week usually happens toward the end of April and into early May. Candidating week is a time for congregational leaders, staff, and members to spend time with the candidate. The candidate 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.

Some suggested events for candidating week candidating week are included in the section on the role of the Candidating week coordinator, in the section on phase three of the settled search in 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 function as the minister for the week, the week should include the typical amount of 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 move forward with less. Often, congregational by-laws indicate a threshold much lower than 90% and most ministers want >95% to accept a call. In general, the search team and candidate should have a sense by Friday of that week if things are going well. There should be a quick check-in between the search team and candidate. If there are concerns, the search team and minister should check in with the UUA Transitions Team at once.

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

Candidating week models

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 recommend that they last less than an hour and have breaks in between (whether in person or virtual). The theme-based forums replace specific committees as the focus of alignment between the minister and congregation. This approach may be particularly useful as we think about the congregation in a modern context.

Specifically, Tuesday/Wednesday/Thursday could be invitational to all committees and task forces to reflect on how their work has impact for the individual spirit, congregational well-being, and the congregation's role in the wider community. This may be new for some committees, but it might be a good, shared 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 take part in these forums, even if they aren't on a committee or task force.

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

Make sure the minister has 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 teams often report it is exhausting and feels, at times, superficial.

Sample schedule:

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

Sunday: Sunday service, congregational lunch, and question and answer time. Perhaps one other meeting with groups within the 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 team and candidate want a second open meeting.

Friday: Search team 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. The minister and family go to lunch with a search team member who votes early. Ballots are counted. The search team notifies the minister of the results. The minister may return to the congregation for a celebration if doing so was planned.

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

Virtual candidating week model

Every candidating week was virtual in 2020; all had successful call votes. 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 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 out how you might adapt to 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 fatigue"—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.

The vote to call

In most cases, candidating week feels like a joyful homecoming. It has a celebratory feel and ends in a vote of 95%+ in favor of calling the candidate minister. In the rare cases in which candidating week has not gone well or congregational votes to call have failed, there has been some misunderstanding about what the congregational vote to call means and what happens if the call vote fails.

The search team has committed tremendous time and effort in identifying a ministry candidate who is a good match for the congregation from the pool of ministers who applied for their congregation's ministry position. The congregation should understand that if the vote to call the candidate fails or is too low to be accepted, there are no other ministers waiting in the wings for evaluation by the congregation. The congregation will need another year of interim ministry and to engage the settled search again the following year.

During candidating week, members are voting on:

- whether they affirm the search team's comprehensive, inclusive, collaborative, transparent process to find the candidate
- whether the search team listened to the congregation
- whether the search team accurately represented the congregation
- whether they believe the search team saw the gifts of ministry which the congregation needs in the candidate
- whether the congregation is willing to move into a shared ministry partnership with the candidate whom the search team identified as a good match for the congregation's needs
- what is best for the whole congregation

They are not voting on:

- whether individuals think they would have chosen the candidate who was identified by the search team on their own, given what they know about the congregation
- whether individuals think, based on two sermons, that every sermon the candidate preaches will or will not speak perfectly to the hearts and minds of every single member every single time
- whether there might be a better match out there somewhere
- whether the candidate is the perfect minister. Ministers come with different skills in worship arts, pastoral care, administrative/organizational work, and social witness presence. No minister will have a high level of skill or interest in ALL of those elements of the ministry. The shared ministry of the congregation will and should shift with the skills and interests of the new minister.
- what is best for a particular individual within the congregation

Notice of call

After the contract is signed and the vote confirmed, someone in leadership who has the signed agreement and is familiar with the compensation package should complete the Notice of Ministerial Call form. The form requests the uploading of a digital version of the signed contract.

After candidating week

After candidating week is complete, the search team should meet to debrief one last time, shred or delete any documents which list applicants' names, and most importantly, celebrate their good work! The team may retain a copy of the congregation's and newly called minister's search profiles before the UUA Transitions Team archives completed searches.

One person from the search team should act as liaison for the newly called minister after candidating week to field questions or point the candidate in the right direction. The candidate and interim minister should talk about how things will be handed off, and ideally the interim minister and search team 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 their partnership well with the interim minister.

The newly called minister, 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 or a chosen liaison, and the candidate should not act as minister of the congregation until their contract begins.

As the congregation prepares to welcome the new minister, they may assemble a photo directory as an act of hospitality. The minister's office should be clean and empty 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 may not preach in August, their first month, and see this as a time to begin to know the staff, meet with board members and other leaders, begin to familiarize themselves with pastoral care needs, and learn more about the congregation. Embarking on a path of deepening trust-building and relationships 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 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 and covenant

Early in the ministry, the board chair and minister should reach out to the congregation's regional staff contact about what resources and assistance are available and recommended for the start of the ministry. Every region may have some slight differences in what they provide, but the field staff is there to help. Start-up programming introduces the minister to the culture of the congregation and the congregation to the minister in ways which would almost certainly not happen naturally and promptly without this programming. Parts of the start-up are for the whole congregation; others are for the minister, staff, and leaders to align, strategize about the new shared ministry partnership, and set goals for their first year together.

Congregations with new ministers from marginalized identity groups may reach out for assistance form the UUA in creating a spirit of welcome and belonging. Ministers with marginalized identities should ask the UUA for what they need as they begin their new ministries.

The new minister should become familiar with the current covenants of the congregation (members/staff) and 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. 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, the congregation should take care 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.

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 90-95% for a call vote? Our by-laws say we only need 2/3 affirmative votes.

If more than 5-10% 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 use paper ballots, 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. It is hard to determine an accurate percentage with a voice vote, so this is not the best option.

Who makes the motion for the vote to call the new minister?

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

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 team member votes early, then escorts the minister and their family to lunch. Upon hearing of a successful call, the search team member takes the minister and family back to the congregation. Some ministers may not want this, however, so planning ahead is important.

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.

Primarily, 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 relationship 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, generally.

What if we got less than 90% of the 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 sometimes recommend forming a new search team of completely new members. It can mean the search team was more afraid of bringing no candidate 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 team 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 to search again in the cycle ahead.

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

Theme-based Candidating Week Model

Congregational Online Voting Resource

Notice of Ministerial Call

Ordinations and Installations

Discussion prompt

Anxiety
What were we, as a search team (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 team?

If no match occurs in the settled search

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 with misaligned ranking, or it may be the result of a search team's and/or minister's careful discernment and good judgment about not rushing into the wrong commitment.

If a congregation does not have a match on offer day, the search team notifies their board that there is no match in the current search cycle. The UUA Transitions Team is available to offer care, guidance, and perspective at this moment and to debrief with the search team.

Decisions and timing

The board and current transitional minister should decide mutually whether to continue to work together for an additional year. If this is not possible or desirable, the board may decide to seek a new interim minister for a year and engage the settled search again next year. Alternatively, the board may decide to use the contract search process to find a minister who could stay a year—or more, if the match is good—and who could even be called in the future.

If a new search is needed, the board may form a new search team as a task force of the board with or without some members of the settled search team, in alignment with the preferences and energy levels of all involved. The board and search team should check out the relevant sections of this handbook to learn about the possibilities and processes for the interim and contract ministry search as soon as they can. The UUA Transitions Team will convert the settled ministry search profile into a contract or interim ministry search profile, upon request. The contract search begins as soon as the search team is ready and concludes when a minister is hired. The interim search begins toward the end of April and concludes in mid-May.

Whatever the board decides, the good work of the settled ministry search team and the congregational self-awareness which increased because of the interim ministry will shape the ministry partnership ahead. The search team served the congregation well with its commitment to good process. No particular outcome was ever assured. If the search team could use some support in working through grief and disappointment, your transitional minister and/or the Congregational Transitions Director will meet with you to debrief the search experience.

FAQs

What should we say to the congregation and when?

An announcement like this should be made on the first Sunday following the offer date. Additional information may be provided as appropriate. "Our ministerial search team did not find a good match this search cycle. The work of the search team was to find a good candidate who would minister well with the congregation. So far that has not happened. Leadership, the search team, and our partners at the UUA are discerning together about the next move which will serve

us all best. We thank the search team for their stellar work on our behalf so far. We know that all the work that went into this search will pay off in our next ministry."

What are some common realizations for congregations which did not find a match in a settled search?

Search teams often feel desperation, panic, and a sense of failure if they cannot find a candidate. Still, they know that if a poor match had been made, a short, conflicted ministry would be more disappointing and 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.

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 first year of search (and second year of interim ministry). Perhaps they discovered some conflict in what the congregation believed about itself, unprocessed grief or trauma, or differing perspectives on what the congregation needs in the next ministry partner once they began their work. A first search without a match may well be indicating simply that the congregation needs more time to be ready for its next settled ministry.

What are some common realizations for ministers who did not find a match in a settled search?

A minister who applied, but did not become a candidate, in the settled search may have significant dissatisfaction. This can shape their next choices and their view of their current ministry. They may feel more resolved than ever to leave or realize that their current congregation is a pretty good match for them still. In the past, ministers have reported that they failed to ask enough questions when preparing to continue searching. Ministers still need to do thorough research as they continue searching, which may include speaking with the current minister, previously ministers, regional staff, and UUA Transitions Team. They should work to keep their standards and spirits high.

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

Not finding a minister simply means that the search team 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 team did its work well and found that no minister they considered was right for the congregation.

When Ministers are Hard to Find

Candidates for ministry serving in contract ministries

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

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

Considering non-UU ministers

While congregational polity authorizes congregations to choose ministers without UU denominational fellowship, there are many crucial concerns congregational leaders should consider when choosing such a minister. Our Congregational Life staff team has assembled this resource to help leaders who are searching outside of the UUA MinistrySearch system and considering ministers who are not UU. The UUA Transitions Team will work with and support leadership in their process and discernment work when considering non-UU ministers, upon request.

For congregations which are affiliated with more than one denomination, and which would like to consider ministers from more than one denomination for an open position, contact the UUA Transitions Team for assistance. We have experience in supporting searches for federated congregations and leveling the playing field for ministers from multiple denominations to be considered.

A UU congregation should consider non-UU clergy only after a UU ministry search fails to yield a suitable candidate. Search teams can only consider non-UU ministers alongside UU minister

applicants if your search team notifies the UUA Transitions Team that this is happening, and the search team indicates plainly in their UUA search profile that the congregation is considering ministers who are not UU. This action may reduce the number of UU applicants, but omitting this information would be unfair to UU applicants.

The UUA Transitions Team and regional staff have seen several cases in which hiring a non-UU minister has ended very poorly for a congregation. The search team should interview and consider non-UU applicants with special care.

Some questions your search team might consider or adapt:

- Why did you apply to our congregation? *Look for responses related to your unique ministry.*
- With your background and personal theology, how would you sustain and shape the UU identity of a congregation?
- What do you know about divisions in Unitarian Universalism in the last few years? How are you positioned in relation to these divisions?
- Have you inquired about or moved toward receiving fellowship through transfer or plural status or with the UUA? How is that going? Or why not?
- Have you worked in a UU congregation before? How did that go, from your perspective? With whom could we talk in that congregation to learn about your work there?
- How are you in relationship with UU ministry colleagues? *This matters because non-UU ministers who are successful in UU spaces have UU collegial support and relationships.*
- Can you connect us with denominational staff in your denomination of origin who can assure us that you have a good reputation in ministry and are not prohibited from serving congregations?
- Our hiring agreement requires that ministers who serve with us abide by the UU Ministers Association Guidelines for the Conduct of Ministry (provide this link in advance of the interview). What are your thoughts on this?

If you can’t find a minister

There have been a number of congregations, particularly in recent years, which have either not found a minister in the timeframe they have planned or have had less ministry partnership than they are used to having. If your congregation finds itself in this situation, please be in touch with regional staff for support while your ministry search continues. Shoring up lay leadership will be crucial in these cases.

As Unitarian Universalists, lay-led ministry is in our bones. While it may not be easy, your congregation’s leaders can maintain the missional focus of your ministry, cast a hopeful vision, sustain joy, create connections, and extend care without a professional ministry partner.

Here are a few suggestions for boards as they plan ahead:

- Check in with the staff and key volunteers who will carry additional work if you do not have a professional ministry partner when you hoped you would. Make sure they feel valued and ask how they are doing. What would help? Where is there strain? Where is there capacity or energy?
- Look to your neighboring congregations. What could you share with them? For example, if you have a talented lay speaker and so do they, could the speakers exchange pulpits? Can your leaders in similar roles meet to support each other?

- Read your regional newsletter. It contains ways to connect and skill up.
- Be in touch with UUA regional staff for support and strategy.
- Check out these resources:
    - Essentials for Lay-led Congregations: https://www.uua.org/leaderlab/lay-led-essentials
    - UU Institute: https://uuinstitute.org/course-tag/lay-led-congregations/
    - Incorporate recorded worship services like the UUA's Sermon of the Month or General Assembly worship into your worship rotation.

Appendix

Important Links

Interim ministry search links:

- Notice of Ministerial Transition
- Interim search calendar
- Employment agreements
- Congregation's Geo index and salary tables
- Fair compensation information
- Compensation Worksheet
- Sample Interview Questions for Search Committees and Ministers (xls)
- Ranking form (for search teams)
- Support for ministers in negotiating contracts (must log in to access): https://uuma.org/collegiality/good-offices/ministry-of-good-offices/
- UUMA guidelines for the conduct of ministry
- Background checks Oxford Document Management Company or Church Mutual Insurance Company
- Notice of Call of Hire
- Interim ministry appraisal

Developmental ministry search links:

- Employment agreements
- Congregation's Geo index and salary tables
- Fair compensation information
- Compensation Worksheet
- Sample Interview Questions for Search Committees and Ministers (xls)
- Search team ranking form
- Ministers' ranking form
- Support for ministers in negotiating contracts (must log in to access): https://uuma.org/collegiality/good-offices/ministry-of-good-offices/
- UUMA guidelines for the conduct of ministry
- Background checks Oxford Document Management Company or Church Mutual Insurance Company
- Notice of Call of Hire
- Development min evaluation

Contract ministry search links:

- Contract ministry search calendar
- Employment agreements
- Congregation's Geo index and salary tables
- Fair compensation information
- Compensation Worksheet

- Sample Interview Questions for Search Committees and Ministers (xls)
- Support for ministers in negotiating contracts (must log in to access): https://uuma.org/collegiality/good-offices/ministry-of-good-offices/
- UUMA guidelines for the conduct of ministry
- Ranking form for search teams (Primetime search only)
- Background checks Oxford Document Management Company or Church Mutual Insurance Company
- Notice of Call of Hire

Settled Search Overview

- Settled search calendar
- Board Checklist for the Settled Search
- Transitional Ministry Handbook
- UUMA Guidelines
- Second Ministry Search Handbook
- Transitions Support for Congregational Staff
- Visual Guide: Search Cycle Newsletter Sign Up for Ministers

Settled Search Phase One: Concluding a Ministry Well

- Settled search calendar
- Notice of Ministerial Transition
- Transitional Ministry Handbook
- Board Checklist for the Settled Search
- Minister Emeritus/a Policies

Settled Search Phase Two: Education and Preparation for Search

- Settled search calendar
- Finding a Compensation Consultant
- General Compensation Information
- Board Checklist for the Settled Search
- Request Settled Ministry Search Support
- Visual Guide: Initiating a Search & Logging into the MinistrySearch System

Settled Search Phase Three: Building the Structure to Search

- Settled search calendar
- “Break Barriers, Build Beliefs” (B4) program information
- Blank Ministerial Record

- Visual Guide: Steps to Completing the Congregational Record
- Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries (Word)
- Contract Change Form
- Compensation Worksheet
- A Guide to Process Observation (from UU Regional Lead Rev. Dr. Ian Evison)

Settled Search Phase Four: Opening the Search

- Settled search calendar
- Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations
- Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox

Settled Search Phase Five: Discernment and Mutual Selection

- Settled search calendar
- Visual Guide: Release of Ministers' Names
- Sample Interview Questions for Search Committees and Ministers (xls)
- Government Reimbursement Rates for Mileage

Settled Search Phase Six: Finalizing the Offer

- Responsible Staffing
- Oxford Document Management Company (background checks)
- Church Mutual Insurance Company (background checks)

Settled Search Phase Seven: Beginning a New Ministry

- Theme-based Candidating Week Model
- Congregational Online Voting Resource
- Notice of Ministerial Call
- Ordinations and Installations