

**MSR REPORT FORM I**

DATE OF CONSULTANCY W/ GOVERNING BOARD \_\_\_\_\_

DATE OF CONSULTANCY W/ CONGREGATION \_\_\_\_\_

**MINISTERIAL SETTLEMENT REPRESENTATIVE:** PLEASE SEND COPY TO CHAIR OF THE CONGREGATION'S GOVERNING BOARD FOR COMPLETION BEFORE YOUR FIRST CONSULTANCY; RETURN COMPLETED FORM TO THE UUA SETTLEMENT OFFICE FOLLOWING THE FIRST CONSULTANCY:  
25 BEACON ST., BOSTON, MA 02108

**CHAIR OF GOVERNING BOARD:** PLEASE PROVIDE THE MSR WITH THIS FORM, ITEMS 1-3 AND 5-8 COMPLETED, AT THE FIRST CONSULTANCY

1. Congregation city \_\_\_\_\_ State/Province \_\_\_\_\_  
Name \_\_\_\_\_

2. Mail address \_\_\_\_\_  
\_\_\_\_\_

3. Chair of governing board \_\_\_\_\_  
E-mail \_\_\_\_\_ Day phone \_\_\_\_\_  
Mail address \_\_\_\_\_  
\_\_\_\_\_

4. Interim Minister (if any) \_\_\_\_\_

5. Congregation's people	<i>CURRENT YEAR</i>	<i>THREE YEARS AGO</i>
Number of adult members	_____	_____
Average Sunday attendance	_____	_____
Children/youth enrollment	_____	_____
Av. children/youth attendance	_____	_____

6. Congregation's finances		
Total operating expenditures	\$ _____	\$ _____
Total operating pledge income	\$ _____	\$ _____
Number of pledge units	_____	_____
Total debt	\$ _____	\$ _____
UUA Annual Program Fund	\$ _____	\$ _____
Fair Share? (circle one)	Yes No	Yes No

7. Current cost of ministry to congregation  
Salary plus clergy housing allowance (S&H) \$ \_\_\_\_\_  
(If the minister occupies a parsonage, indicate the amount of S&H so attributable: \$ \_\_\_\_\_)

Benefits:

Contribution in lieu of FICA	\$ _____
Retirement plan contribution	_____
Health insurance premium	_____
Group term life ins. premium	_____
Disability ins. premium	_____
Dental ins. premium	_____
Professional expense allowance	_____
Total of benefits plus expenses	_____
Total cost of ministry	\$ _____

8. Estimated Timetable  
 Date for Search Committee selection \_\_\_\_\_  
 Date for Ministerial Settlement \_\_\_\_\_
9. Checklist for discussion w/ governing board:  
 \_\_\_\_\_ Review church bylaws re: calling a minister  
 \_\_\_\_\_ Review resources on Settlement website  
 \_\_\_\_\_ Review access and reach of on-line Ministerial Settlement System  
 \_\_\_\_\_ Application to List (information from the Board) and Congregational Record  
 (information from search committee)  
 \_\_\_\_\_ Visit from Compensation Consultant—soon!  
 \_\_\_\_\_ Budgeting: search committee expenses and minister’s moving expenses  
 \_\_\_\_\_ Fair Compensation guidelines and salary plus benefits approach to  
 compensation (vs. TCM)  
 \_\_\_\_\_ Power relationship between governing board and search committee:  
 confidentiality, recommendation to congregation  
 \_\_\_\_\_ Board involvement during candidating week  
 \_\_\_\_\_ Ministerial agreement--negotiating team to draft  
 \_\_\_\_\_ Appropriate search committee budget  
 \_\_\_\_\_ Moving expenses for the minister and family  
 \_\_\_\_\_ “Beyond Categorical Thinking” program  
 \_\_\_\_\_ Emeritus/a former minister  
 \_\_\_\_\_ Search Committee Luncheon at UUA General Assembly—for other lay  
 leaders if committee as yet unformed
10. MSR’s observations  
*DESCRIBE THE CURRENT CONDITION OF THE CONGREGATION, ITS MORALE, AGE COMPOSITION,  
 GROWTH POTENTIAL, AND CONCEPT OF MINISTRY*
11. What concerns may the board/congregation have about the UUA’s services in general and  
 the settlement process in particular?

*PLEASE REMEMBER TO ATTACH YOUR EXPENSE VOUCHER FOR THIS CONSULTANCY.*

*MSR* \_\_\_\_\_

*DATE* \_\_\_\_\_