

When a Minister Leaves
Serving Congregations in Transition
A Guide for District Executives, Ministerial Settlement Representatives,
District Compensation Consultants, Interim Ministers,
and the Transitions Office
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1. Initial Move: Share the Word

Whether word of a minister's intended departure comes first to the District Executive or to the Transitions Director, the first to hear informs the other. Cooperation now between two leads to cooperation later among five: District Executive (DE), Ministerial Settlement Representative (MSR), District Compensation Consultant (DCC), interim minister, and the Transitions Office.

2. Transitions' "Next Steps" Letters

Receiving word of a minister's announced departure—whether by retirement, voluntary resignation for the sake of a better position, pressured termination, or anything in between—the Transitions Office emails a "congregation's next steps" letter to the chair of the congregation's governing board, with copies to the DE, MSR, and DCC (Appendix A). The purpose of the letter is to start the machinery that will head the congregation into as fruitful a transition as possible, starting with transition interview and interim minister selection. The letter provides the name and contact information for all parties and encourages a transition interview at the earliest opportunity and the scheduling of the first MSR visit for a later date. It speaks strongly in favor of deferring the election of the ministerial search committee until after the MSR and DCC have both visited.

The Transitions Office points to the following materials, available on line:

- *The Interim and Consulting Ministries Handbook*, including an application for an interim minister
- *the Settlement Handbook for Ministers and Congregations*
- *the Resource Guide for Ministerial Search Committees*
- *Joint Recommendations Concerning Letters of Agreement between Ministers and Congregations*
- *Succession Following Meritorious Ministry*
- the Unitarian Universalist Ministers Association's *Guidelines for the Unitarian Universalist Ministry* and *Code of Professional Practice*, and
- a brochure about and visit request form for the "Beyond Categorical Thinking" program. The cost of a BCT weekend is \$250.

Viewing of *The Interim Opportunity*, a Transitions Office-produced DVD on the role and purpose of interim ministry, is arranged through the District.

The Transitions Office also emails a "Minister's Leavetaking" letter to the outgoing minister, mentioning the UUMA Guidelines applicable to former ministers (Appendix B).

3. District Executive's Transition and Exit Interviews

The DE (or his or her designee) interviews the lay leadership, developing as full a picture as possible of the congregation's present situation from the lay leadership's point of view, including the leadership's intentions with regard to ministry, both interim and called. The DE adds her or his recommendation to defer electing a search committee until after the MSR's first visit.

In discussing interim ministry, the DE may wish to view and discuss *The Interim Opportunity* with the leadership. The advises a mid-size or larger congregation to hire an Accredited Interim Minister (AIM) or AIMIT (AIM in Training), but points out that virtually all potential interim ministers will have completed the Orientation to Interim Ministry program. The DE indicates that interim ministers may not stay with the congregation for more than two years. In discussing

settled ministry the DE describes the search process as generally yielding a half-dozen to a dozen—but in some cases two or even three times that number—of interested ministers for the search committee’s consideration.

The DE retains the congregational Transition Interview report (Appendix C) in the District file and emails copies to the board chair, the Transitions Office, and the MSR. With the board’s approval the DE also provides a copy to the departing minister. The Transitions Office provides a copy to the interim minister once hired and the successor minister once called. In this and perhaps subsequent interviews, the DE assists the congregation in making basic decisions about its next ministry: the advisability of an interim minister, the advisable duration of the interim period, and the probable start date of the new settled minister.

The DE interviews the exiting minister, developing a similar picture of the congregation’s present situation from the minister’s perspective. The DE may be able to assist the minister in processing “termination emotions” and doing grief work, as well. The DE retains the ministerial Exit Interview report (Appendix D) in the District file and emails copies to the minister and the Transitions Office. With the minister’s approval the DE provides a copy to the board chair, and the Transitions Director provides a copy to the interim minister once hired and the settled minister once called.

In both the Transition and Exit Interviews, it is important that the interviewer ask the scripted questions about distribution of the report.

4. The Interim Minister's Access to Information

Upon appointment, the Transitions Office provides the interim minister with copies of the Exit Interview (if approved by the departed minister) and the Transition Interview, and the DE provides the interim minister with additional relevant information.

5. Ministerial Settlement Representative First Visit

The UUA funds two visits by the MSR to qualifying congregations, those offering at least 75% of minimum A-level compensation as recommended by the UUA (see the *Settlement Handbook*.) The MSR's purpose is to assist the congregation and its leadership in designing and executing the most responsible search process possible. In the first visit, the MSR describes the settlement process to the congregation, sometimes using the "sermon slot" in the Sunday service to do so, and meets with the governing board. Issues discussed with the board include the search committee budget, ministerial compensation, moving expenses for minister and family, and honoring of the outgoing minister and related succession matters; the application for a minister and the dates and places of upcoming search committee seminars; and the draft ministry agreement and the "Beyond Categorical Thinking" program.

6. District Compensation Consultant Visit

The DCC gives the governing board and lay leadership tools with which to review their plan of compensation for the minister and all church staff in the context of the congregation’s size and resources, the local cost of living, and UUA congregations’ commitment to fairness. The congregation is now ready to file its application for a minister.

7. Ministerial Settlement Representative Visit II

The MSR's second visit takes place as soon as possible after the ministerial search committee and negotiating team have been formed and the governing board has settled on the ministerial

compensation to be offered. Its purposes are to review or establish the search committee's timetable and work plan, to overcome any resistance to a retreat or team-building meeting, and to review the model ministry agreements (available in *Joint Recommendations*) with the negotiating committee. The MSR will also respond to questions and concerns raised by the search committee and negotiating team, alert the Transitions Office to any concerns, and offer additional Transitions Office assistance when necessary.

8. The Arrival of the Interim Minister

The DE provides, and the interim minister welcomes, a start-up workshop in which the DE facilitates mutual understanding and the allocation of responsibilities between interim minister and lay leadership. With increasing frequency, interim ministers describe their ministries in terms of the five developmental tasks of interim ministry described in Roger Nicholson's *Temporary Shepherds: A Congregational Handbook of Interim Ministry* (available at the UUA bookstore): coming to terms with history, discovering a new identity, leadership changes during an interim, renewing linkages to the district and the UUA, and committing to new directions in ministry.

9. The Interim Minister and the Search Process

Interim ministers do not participate directly in the life of the search committee, the reading of Ministerial Records and ministers' packets, or the review of pre-candidates. Nor will they respond to committee questions about potential candidates. Interim ministers are encouraged, however, to assist the search committee by:

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

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

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

In January or February the Transitions Director requests of the DE a brief, impressionistic assessment of the progress of the interim ministry.

10. The Ministerial Search Committee at Work

The MSR maintains close touch with the search committee, reviewing the completed informational packet, neutral pulpit plans, the clarity and commitment of the committee to

practices of confidentiality, reference and background checking, decision-making, and its general ability to carry out a responsible search. The committee may engage the MSR on a consulting basis for visits beyond the two funded by the Transitions Office. The Transitions Office makes the Ministerial Records available to the committee and the MSR on the settlement system. From this point on, the search committee will proceed with its search, communicating with the MSR and the Transitions Office as necessary.

11. Candidating Week

The interim minister plans to be away from the church during candidating week, but available for pastoral emergencies.

12. The Arrival of the New Settled Minister

The DE conducts a start-up workshop for the lay leadership and newly settled minister.

Appendix A
Congregation's next steps (9/1/2007)

Note to those copied: The news contained in the first paragraph of this letter may not yet have been distributed more broadly by the minister. Until you are assured that it has been, please hold it in confidence among you.

Dear [Title, Last Name]:

We have learned of the [resignation/planned retirement] of the [Title, First Name, Last Name] as minister of your congregation. I know how trying a time a ministerial transition may be for a congregation, and so wanted to be in touch as soon as possible to offer my assistance as you begin to plan your next steps. The appended "overview of the ministerial search process" describes the assistance you may expect from the Unitarian Universalist Association from the present moment through the entire transition period and up to and including the installation of the successor minister. I look forward to working with you to ensure that your congregation makes the most of this unique opportunity to consider together your life in common.

I entreat you not to rush. The interim period between settled ministries provides an invaluable opportunity for the leadership and the congregation as a whole to reflect on the institution and its internal life and external relations and to arrive at new insights about the value you can add to each other's lives and to the well-being of your community. Many congregations find that two years "in the interim" serves them better than one. Whatever the duration, I urge you to make the most of the opportunity the interim offers.

Typically, the entire search process takes from twelve to fifteen months. During that period, you will have an opportunity to assess the general health of your congregation, focus your attention on new directions for your future, and to profile the qualities you want in your next minister or ministry team. A year may seem long, but patience pays. The most important strength your minister will bring is neither talent nor experience nor even skill, but your support. It's worth some time to make sure your choice will earn the support of 90 to 100% of your membership. I recommend that the established procedures be followed as closely as possible. I assure you that their good sense will become increasingly apparent as you use them.

I wish you well in your next steps. Please call on me directly if I can be of assistance.

Sincerely,

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Overview of the ministerial search process:

What you can do now—the interim period:

The first step for you to take is to be in touch with your District Executive (or District Consultant, or Congregational Services Coordinator). Your DE will arrange for a Transition Interview with your governing board and leadership and forward a report to me. These reports provide a "snapshot" of the feelings, hopes, and expectations your lay leaders have at this important moment.

Your DE will also discuss with you specific options for your immediate future in the light of your current situation. Perhaps you may wish to watch *The Interim Opportunity*, a Transitions Office-produced DVD on the role and purpose of interim ministry, together. We hope you find it illuminating. So that you can begin making plans for the transition on which you are already embarked, let me direct you to our on-line publication, the *Interim and Consulting Ministries Handbook*, a guide to acquaint you with the UUA's Interim Ministry Program. Appendix A of publication provides you with the form for applying for an interim minister, most easily submitted on-line. If time is short you need not wait for the Transition Interview to send it in. To access this and all other materials here, see "Going On-Line" at the end of this overview.

Where to go for help—settling a new minister:

Your Ministerial Settlement Representative

When you are ready to begin thinking about searching for a new called minister, there are three human resources available to you at no or low cost. The first is your District's Ministerial Settlement Representative (MSR), who will assist you in planning and pursuing your search. Ministerial Settlement Representatives are able to make two visits to every qualifying congregation (those offering full-time positions with compensation at least 75% of minimum A-level compensation as recommended by the UUA); they also stay in close touch with the search committee by phone and e-mail. Some MSRs are willing to contract with search committees for additional visits if desired.

The first MSR visit should include a meeting with your governing board and with the congregation at large. MSRs who are asked to fill the pulpit should be offered the UUMA-recommended honorarium. The purpose of this first meeting is to describe the entire process of ministerial settlement and to respond to the numerous questions the board and congregation will likely have. *Please do not nominate or elect your Ministerial Search Committee until you have met with your MSR.* The choice of your Search Committee is too important to be made in haste, without the benefit of your MSR's counsel. You may wish to schedule a visit by the MSR now, timed to follow the transition interview with the DE.

Your District Compensation Consultant

Your District Compensation Consultant will also be eager to visit you for the purpose of assisting your Board and leadership in considering the compensation of your minister and all church staff in the context of your congregation's size and resources, the wage rates in your locale, and the commitment to fairness embraced by Unitarian Universalist Association member congregations.

I encourage you to hold off applying for a new minister until your Compensation Consultant has visited with your governing board. The issue of ministerial compensation is seldom simple, and never exists in a vacuum.

Beyond Categorical Thinking program

The third human resource is the UUA's "Beyond Categorical Thinking" program, which offers congregations the opportunity to confront attitudes and prejudices that may make it difficult to give fair consideration to ministers who are gay, lesbian, bisexual, and transgender, ministers who are disabled, and ministers who are members of groups historically marginalized on the basis of race or ethnicity. To schedule or to inquire about the program, which costs \$250, please contact the Rev. Keith Kron (kkron@uua.org), Director of the UUA's Office of Bisexual, Gay, Lesbian, and Transgender Concerns.

Additional materials

As you begin to look further down the road, let me point out a number of additional Transitions Office publications readily available on the Transitions Office website, <http://www.uua.org/aboutus/professionalstaff/ministryprofessional/transitions/index.shtml>. Once you are there click on the "Services and Resources from the Transitions Office" on the right.

- the *Settlement Handbook for Ministers and Congregations*, the essential guide for congregations considering new ministry; I recommend that this handbook be duplicated and distributed to all members of your governing board before your MSR's first visit
- the *Resource Guide for Search Committees*; a smorgasbord of practical resources for the ministerial search committee
- *Joint Recommendations Concerning Letters of Agreement between Ministers and Congregations*, an outline of the issues to be considered by congregation and minister in drafting documents descriptive of the relationship between them; includes two model agreements
- *Succession Following Meritorious Ministry*, helpful in considering the relationship between a former minister, a newly settled minister, and the congregation

As you consider the expectations you might have of your next minister, you should also consider the expectations the Unitarian Universalist Ministers Association has of its member. Find the *Guidelines for the Unitarian Universalist Ministry and Code of Professional Practice*, at <http://www.uuma.org/files/Guidelines2008.pdf>

Going On-Line

- Go to <http://www2.uua.org/password.asp>
- On this registration screen, register as a congregation. Only the committee member responsible for communicating with the Transitions Office should register the committee. And only one registration per committee, please!

- Complete the registration information and create your own username and password: no more than eight letters and/or numbers each, and only one username and password per committee or minister. Save them! You can't re-enter without them.
- You should now have arrived at the menu screen. The Interim Minister Application is option 1. Complete and submit it. It will remain as a part of your Settlement System site, as well, so you can see what you said.
- **Note:** If, after you complete the registration screen, the screen merely reappears, the likelihood is that your username and/or password is already in use. Please re-register, avoiding double u's, and select a new username and password.
- To re-enter the system, go to <http://www2.uua.org/> to enter your username and password.
- You should now have arrived at the menu screen, and should be ready to proceed!

Appendix B: Minister's leavetaking (9/1/2007)

Dear (Minister's first name),

I understand that you have decided to (resign, etc) from (Name of Cong). I wish you a ministry of leave-taking that is rich in affection, insight, and healing, and that brings with it a sense of closure.

If you do not have a copy of Roy Oswald's *Running through the Thistles*, please let us know and we will send you a complimentary copy. Two other helpful pieces: Mark Morrison-Reed's Berry Street lecture of 2000, "After Running through the Thistles the Hard Part Begins," available in the UUA's on-line Leaders Library, and Edward A. White's *Saying Good-bye* (Alban).

Although you will be consumed with all the matters of leave taking, some among the congregation, by inclination or by virtue of office, will begin to plan ahead. Some of them will ask your assistance. Do bear in mind the directives on the topic in the *UUMA Guidelines* (sec. I. D. 4&5):

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

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

In assisting their understanding, I urge you to reread the *Settlement Handbook* (available by link from the Settlement web page), since big changes in the process have occurred since you were last in search. You can encourage the independence their new situation requires by getting the District Executive in on a timely basis for a transition interview. The Ministerial Settlement Representative will arrange to meet with the congregation once the interview is complete.

If you are remaining in the locale in which you have served, again the *UUMA Guidelines* will be helpful to you in describing the relationship to be sought among former minister, current minister, and congregation (sec. IX.C-E). An additional on-line publication, *Succession Following Meritorious Ministry*, offers further advice. Your absenting yourself entirely from the congregation during the interim period will be very helpful to the congregation as it turns the page.

As you plan your own next steps, I wish you well, and encourage you to let me and my colleagues in the Ministry and Professional Leadership Staff Group know if and how we can assist you. See, for example, the post script bearing, in addition to another, a message from Ralph Mero. Whether you seek (or have found!) a new congregation, or a new mode of

ministry—community, interim, or other—whether you are seeking a period of rejuvenation, reflection, or retirement, we look forward to remaining in touch and serving where we can.

I wish you well in your next steps.

Sincerely,

John Weston

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A note from Ralph Mero . . .

Ministers changing jobs should know they have the right to continue their group health insurance for 18 months by converting the group health insurance under which they were covered to an individual policy under a federal law known as COBRA. They are entitled to a certificate of coverage from the carrier they are leaving, which they can take to another individual plan carrier in the state to which they are moving. They cannot be denied a new individual health policy for 18 months - even if they have pre-existing conditions - so long as they can prove they had coverage in the previous period. However the new carrier can charge higher premiums than were previously paid.

For ministers enrolled in the UUA Highmark BCBS health plan (that became effective January 1, 2007) who are moving to a new congregation, continuation of health insurance coverage is not a problem. They should immediately provide the UUA Health Plan Office with a change of address for themselves and their new congregation. Their coverage in the UUA plan continues indefinitely just as before.

For ministers enrolled in the Highmark plan who are leaving their current position and not moving to a new settlement right away, continuation of health insurance coverage is still available for 18 months. Immediately contact the UUA health plan office at 617/948-6405 or write healthinsurance@uua.org.

Ministers who have been enrolled in the UU group long-term disability insurance with MetLife may convert to individual coverage on a guaranteed basis so long as they have not terminated due to retirement. They must apply in writing for the conversion within 31 days after their coverage in the group plan ends. They must also pay the first premium within this 31 day time period.

For example, a minister with disability insurance who is leaving a settled ministry on June 30th – and who is not moving to a new position but also not retiring - would have until July 31st to request that his or her MetLife group long-term disability insurance be converted to an individual policy. The monthly statement will be sent to their home address, with the minister paying the premium. The phone number for converting the group long-term disability policy to individual coverage is 617/948-6401 or write twithy@uua.org.

Appendix C: Congregational Transition Interview (draft as of 8/9/07)

(To be done with lay leadership by the District Consultant or his/her designee)

Date of interview:

Congregation:

City & state/province:

Board chair or alternate contact person:

E-Mail Address:

Telephone Numbers: H: O:

Number of persons participating:

Name of each participant and his/her role in the leadership:

Name of departing minister:

Date of minister's departure:

Name of interviewer:

This interview aims to elicit the story of this ministry and of the congregation during it. The interviewer should take pains to separate interpretation from reporting. The District will furnish copies of the written report to the board chair or alternate contact person, the Ministerial Transitions Office, and the Ministerial Settlement Representative, while keeping a copy for the District files. The Transitions Office will furnish a copy to the interim minister-to-be and to the successor minister. At the end of the interview those participating will be asked whether the District may furnish the outgoing minister with a copy. Distribution of this report is restricted to those authorized to receive it.

The Transition Interview provides an occasion for a representative of the district to check in with the leadership of the congregation. It is a good time to establish whether (1) the congregation has checked whether it is in compliance with its by-laws regarding such matters as termination, call, and committee on ministry, and whether its by-laws serve them well (experience of district staff and the Transitions Director, for example, suggests that a call of a minister should require at least a 90% vote and for dismissal 30% should be sufficient), (2) the congregation has thoughtfully considered the appropriate pace for its search process, (3) the congregation understands the roles of the Ministerial Settlement Representative and the Compensation Consultant and has made provision to meet with them at the appropriate point in its process, and (4) the congregation needs any other assistance.

Interview

1. What were the most significant accomplishments of the ministry of this minister?
2. What were the greatest frustrations of the ministry of this minister?
3. Imagine that you are writing a screenplay of congregational life here during the ministry of this minister. What's the story?
4. Did any issues arise during this minister's leavetaking that you feel need to be dealt with structurally (perhaps a revision of the bylaws) or covenantally (for example a rupture in the congregation's trust in its elected leaders)?"
5. What has been your history of relating to ministers?
6. Describe the working relationship between the minister(s), the staff, the Board, the church committees, and the congregation.
7. Has toxic behavior—such as an implicit or explicit ultimatum, a raised, angry voice, or more serious acting out—been a feature of congregational life and how has the congregation dealt with it?

8. Are there obstacles that keep this congregation from becoming a more vital center of liberal religion in this community?
9. What attracts people to this congregation?
10. How does this congregation work to counter racism and oppression, both with the congregation and in the surrounding community?
11. What are your hopes and expectations for your new minister?
12. May a copy of this interview report be furnished to the outgoing minister?
yes no

To the District Consultant:

Many congregations are ready to move right into the search for a new minister. With the guidance of an effective and well-trained interim minister they are able to make the turn from the previous relationship to a potential new one within one year. Other congregations, however, may face a difficult situation that they must work through at length before they can execute the turn. Recent research by Accredited Interim Minister Robert Latham indicates that there are four such situations, each of which may make it advisable to extend the interim period by a year:

- A congregation may feel *betrayed*: something in the relationship between the congregation and the departing minister has left one or both in a state of dramatic trauma, and there is a quality of the battlefield about the congregation.
- A congregation may feel *bereft*: a long-term, loving relationship has ended, and the once-Promised Land has become a desert.
- A congregation may feel *benumbed*: after a lengthy and benign ministry, perhaps a prolonged caretaking ministry, the congregation is in a Rip Van Winkle-like state of spiritual slumber, unaware of its potential or its mission.
- Finally, a congregation may *be*, rather than feel, *bequeathed*: so entirely does it reflect the ownership of the departing minister that it is unable to conceive of an independent vision of its own. Any degree of change is received as a violation.

In the light of these and other insights or concerns you may have, please describe the current state of the congregation as you see it, and make such observations and recommendations as you wish for scheduling the settlement process to the Settlement Office.

Appendix D: Ministerial Exit Interview (9/1/2007)
 (To be done with departing minister by the District Consultant)

Date of Interview:
 Congregation:
 City & state/province:
 Name of Departing Minister:
 Date of minister's departure:
 Name of interviewer:

The purpose of this exit interview is to provide a snapshot of the congregation at this time in its history in the view of the departing minister, as well as a sense of how this placement has contributed to the minister's formation. The interviewer should thus take pains to separate interpretation from reporting. The minister has the option of completing the interview in written form. The District will furnish copies of the written report to the minister and the Ministerial Settlement Office, while keeping a copy for the District files. At the end of the interview the minister will be asked whether the District may furnish a copy to the chair of the governing board and whether the Settlement Office may furnish a copy to the interim minister-to-be and the successor minister. Distribution of this report is restricted to those authorized to receive it.

Interview

1. What do you feel were your most significant accomplishments during this ministry?
2. What were your frustrations and disappointments during this time?
3. Imagine you were writing a screenplay of congregational life during your ministry. What would be the story?
4. What were the circumstances of your leaving?
 - a. How do you feel you handled the leavetaking (would you do anything differently)?
 - b. Was there any conflict among laity around your leavetaking and how did they handle it?
5. What is the history of this congregation's relationship to ministers?
6. What have you learned about your self as a minister during this settlement?
7. Describe your working relationship with:
 - a. Other ministers on staff (if any):
 - b. Staff:
 - c. Governing body:
 - d. Committees:
8. Have there been any issues with toxic behavior in the congregation? If so who handles them and how?
9. What are the obstacles that keep this congregation from being a more vital center of liberal religion in this community?
10. What attracts people to the congregation?
11. How does this congregation work to counter racism and oppression?
12. What are your wishes for the congregation for their future?

13. May a copy of this interview be furnished to . . .
- a. the governing board? _____ yes _____ no
 - b. the interim minister-to-be? _____ yes _____ no
 - c. the successor minister? _____ yes _____ no

To the district consultant: Please add any commentary you may have here.