Changes to Settlement Handbook for 2021-2022

New updates as of June 2021:

- Clarified that the MinistrySearch dashboard, application portal, and congregational record are all the same thing (p. 30)
- Added "*Congregations may vote for up to seven search committee members. If someone who is appointed to the search committee later drops out, please talk with Christine Purcell. Canadian congregations should speak with Keith Kron.*" Clarified that "*the board may choose how many members to elect and how many to appoint from the remaining names on the ballot.*" (p. 35)
- Added info about virtual search committee retreats (p. 45)
- Added info about virtual pre-candidating (p. 58)
- Added virtual and theme-based models for candidating week (p.64-67)
- Clarified that current employees of a prospective minister's congregation should not be references (p. 64)
- Added link to Transitions Support for Congregational Staff page on UUA website (p. 19)
- Added "*List of ministers who have regular contact with congregants*" to documents packet requirements (p. 54)
- Strengthened language about the completion of the Beyond Categorical Thinking workshop being an expectation for all search committees (changes throughout the handbook, especially on p. 51)
- Added that virtual BCT is the default option and congregations may arrange for an in-person BCT for an additional fee. Clarified typical dates and times of BCT workshops, both virtual and in person (p. 51)
- Changed first and second round of search language to first and second offer dates (changes throughout handbook, especially p. 101-104)
- Added names, job titles, and brief descriptions of UUA staff who provide direct transition support for congregations and ministers in search (p. 26-27)
- Added Geo Index 2021-2022 links (p. 72 and Appendix)
- Edited links for clarity and accessibility (changes made throughout the handbook)

Previously Published Updates from February 2021:

- Added Ordinations and Installations as a resource in Phase Seven's links section and in the appendix (resolved)
- Added year-end reports to documents packet to reflect how annual budgets played out (p. 52)
- Clarified the description of diversity within UU congregations for the search committee selection process (p.27)
- Added information on standardized search support fees---coaching fees were different across regions until the 2022 search (p. 36)
- Included a link to a new form for congregational presidents to request settled search support, which is a requirement for using our MinistrySearch system (p.38)
- BCT costs for congregations now include standard UUMA pulpit supply fee, payable by the congregation, separate from search support costs (p. 50)
- Search budget info added (p. 26)

- In accordance with new state laws and emerging UUA policy on equitable compensation for consultants and volunteers, the regional transition coach role has been clarified to include only the search committee retreat leadership, leaving on-going support work to UUA staff (changes throughout the handbook)
- Modified inside candidate process: the congregational record will not be published for all searching ministers to see until the search committee has decided not to proceed with the potential inside candidate (p. 12)
- Added "*Please do not use [congregational] surveys from before 2020 without carefully considering questions with an equity and inclusion lens." (p. 47)*
- Strengthened the recommendation that search committees ask for feedback on their congregational records from interim ministers, and added the recommendation that search committees also invite feedback from regional staff on the congregational record (p. 52). Without volunteer coaches reviewing the record, interims and UUA field staff, who have a strong understanding of the congregations' needs and history, can provide beneficial feedback.
- Asked that search committees inform the Transitions Office when they have confirmed pre-candidates scheduled for neutral pulpits/pre-candidating weekends (name, date, location). They don't have to wait until they're ready to request an interpretive file summary, though 10 days' notice is still required for file summaries. (p. 81)