

TRANSITIONAL MINISTRY HANDBOOK

A Guide for Congregations and Ministers

Transitions Office
Unitarian Universalist Association
24 Farnsworth Street
Boston, MA 02210-1409
transitions@uua.org
617.948.6408
February 4, 2016

Spring 2017 Dates – for August 2017 start

April 18 – Interim applications due from ministers and congregations

Round 1

- May 1 or 2 – congregations receive names of interested ministers
- May 12, noon Eastern time – congregations in round 1 may make an offer

Round 2

- May 15 or 16 – congregations without a match from round 1 receive names of interested ministers
- May 26, noon Eastern time – congregations in round 2 may make an offer

Round 3

- May 29 – congregations still without a match receive names of interested ministers
- Offers may be made at any time

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Publications referred to in this *Handbook* can be found on the Transitions Office website:

<http://www.uua.org/transitions>

Introduction: Ministry—Called, Interim, or Consulting?

This *Transitional Ministry Handbook* is for the use of congregations whose long-term health may best be served by a time-limited ministry in the immediate future. Congregations that are well along in dealing with transitional issues and who are preparing to go into search for a minister to call to a long-term covenantal relationship should see instead the UUA's *Settlement Handbook for Ministers and Congregations*, which provides detailed guidance to an inclusive and equitable search process.

Why might a time-limited ministry better serve? Consider the following situations:

1. a previous minister is departing . . .
 - after serving the church for five years or more—long enough, if a senior or sole ministry, for a significant number of the congregation to identify the church with the departed minister
 - as the result of dying: the death of a minister while serving is always a traumatic event for a congregation
 - under pressure, with tension and resentment filling the air
 - in the midst of conflict: a congregation racked with mutual disappointment, mistrust, and anger is in no condition to enter into a new relationship
2. the ministerial position is coming open at a time of year that makes a search for a called minister impracticable. Generally speaking, a settled minister search committee should be formed a year in advance of candidating week, and candidating week, almost always in April or May, is usually three or four months before the minister begins service.
3. a growth-oriented, goal-oriented congregation wants a ministerial “coach” for the purpose of stepping beyond its current size dynamic
4. a large congregation needs a strong “hold the fort” minister in an assistant or associate position while going into search for a minister to be settled in that capacity
5. factors such as small size, remote location, and limited finances make success in the called minister search process unlikely; such factors lead to disappointment in attempts to secure an interim minister, as well
6. the congregation is at a challenging stage in its development. Whether due to deep differences, chronic conflict, serious financial problems, or an inability to agree on mission and vision, the congregation may need three to five years to get its house in order before it seeks to call a minister.
7. the position is for an assistant minister. Because they work under the direct supervision of a senior minister, assistant ministers are usually hired, often but not always with the proviso that they may be considered for a call after the passage of a stated period of time.

The first and second of these seven situations make interim ministry advisable almost universally. Interim ministers are recognized for their ability to assist congregations in coming to terms with their past and claiming their new identity as they ready themselves for a stimulating relationship with a new settled minister. In order to guarantee their ability to speak the truth “without fear or favor,” interim ministers agree not to serve beyond two years in any congregation, and not to be a candidate for the called position until they have been absent from the congregation for at least three years. In an average year some ninety North American congregations are served by interim ministers—more than 10% of all congregations continent-wide that are served by full-time ministry!

Fewer congregations face the other five situations. But as the number of consulting arrangements in private industry has grown in the past twenty years, so too the expressed need for similar flexibility in addressing short-term needs among Unitarian Universalist congregations. The UUA is developing training and resources to equip ministers to meet those needs. While consulting contracts may be from year to year or three or even five years in duration, there is no stipulation that the minister may not at some point be called to that or another ministry position in the congregation.

When Ministers Are Scarce

From time to time a minister cannot be found to serve a congregation in need. In a number of recent instances the UUA Transitions Director, the UUA Ministerial Credentialing Director, and the UUA regional staff have collaborated to provide a transfer minister or a student in candidate status to serve such a congregation. The UUA's Ministerial Fellowship Committee's Rules and Policies, to which students and other candidates are accountable, seek to prevent a candidate eager to serve from getting ahead of his or her training or transfer process. Those in 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." Because the 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 well-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 final fellowship to serve as a mentor, and to be in frequent contact with the DE. A minister-to-be serving under this arrangement should be able to expect compensation equal to at least 90 percent of the UUA-recommended minimum, taking into account size and wage rate area.

Interim Ministry

Change: Anxiety-Provoking and Liberating

News of a minister's departure may be received with distress by many, but other feelings are inevitably present: approval of the departure's timeliness, relief at its finally taking place, even unseemly joy. The purpose of interim ministry is to enable a congregation to call a successor minister based not reflexively but on the basis of its own independent identity, strength, and direction—in sum, based on its health.

It is difficult to overstate the opportunities provided to a congregation during an interim period. Rarely in the life of any human institution—congregation, business, nation, or household—is there such a chance to begin anew. The interim period following the end of one relationship and preceding the beginning of another offers such an opportunity, providing the breathing space during which a congregation can review its goals, assess its programs, consider the quality of its life in common, and “tune up” for a new era. The two-year period it usually takes for a congregation to grow into and own its identity, independent of both positive and negative feelings about the ministry that has come to an end, can be exciting, even transformative, when devoted to self-examination and institutional renewal. A palate cleanser, one might say.

Although people's initial instinct will often be to simply hunker down and “hold the fort,” it is inevitable that as the power structure realigns, some will step back and others forward to fill the power vacuum caused by ministerial vacancy. As the lid comes off, anxieties may first express themselves over relatively mundane matters—who will see to filling the pulpit? who to the provision of pastoral care? who to rites of passage, administration, supervising the staff, locking up the church?—but soon more serious concerns unearth themselves. The church staff feels overwhelmed, momentum stalls, new members and even some long-timers back away, the canvass falls short. Anxiety-driven conflict rends the fabric of congregational life. Compounded, these stresses will weigh heavily on the present, yes, but also on prospects for a successor ministry.

For twenty-five years now Unitarian Universalist congregations, many of the mainline Protestant denominations, and synagogues of all traditions have depended on interim ministry to deal with the phenomenon of transition. They have done so largely in response to an important Alban Institute study which established the fact that congregations not hiring an intentional interim minister during a ministerial transition often find themselves having called an “unintentional interim minister” instead. At best the next minister will have heavy going. At worst the minister will not last. And indeed, among Unitarian Universalist congregations the practice of hiring an interim minister following a ministerial departure is almost universal.

To enable congregations to heal and to enrich their sense of religious community during this transitional period, the specially trained interim minister seeks to:

- bring the reassurance that a seasoned professional is working with the congregation. Momentum will not be lost. The search for a new minister will not be unduly pressured. The disaffected can return freely.
- deal with "termination emotions" surrounding the former minister who, whether beloved or disliked, was at the center of a web of relationships now tender, often torn. Unless these emotions are discharged, they will wait to be dumped onto the following settled minister.

- help the congregation review its operations and clarify its goals. The new called minister will thus find the congregation to be a moving train, instead of a stalled bus waiting for a driver—or a mechanic!
- model a different but still successful style of ministry, thus showing the congregation (for many of whom the departed minister may have been the only UU minister they've ever known) that more than one ministerial style can be effective.

Please see *In the Interim: Strategies for Interim Ministers and Congregations* (2013) a collection of essays by UU ministers and congregants which provides a road map for a transformative and fulfilling interim period. Additional guidance on the possibilities offered by an interim ministry can be found in two fine Alban Institute books on the subject: Roger Nicholson's *Temporary Shepherds: A Congregational Handbook for Interim Ministry* (1998) and Loren Mead's *A Change of Pastors, and How It Affects Change in the Congregation* (2005).

About Accredited Interim Ministry

There have always been ministers available to fill a vacant pulpit until a new minister is called. However, recognition of the complexities inherent in this period has led the Unitarian Universalist Association's Transitions Office to develop a specialized program for ministers who make interim work their calling. The Accredited Interim Minister (AIM) designation is conferred on ministers who complete the program, attesting to their competence both in parish ministry and as resident consultants, able to assist congregations in reviewing and revitalizing their operations. In addition to carrying out the normal responsibilities of congregational ministry, including worship and pastoral care, they possess specific skills in assisting a congregation in:

- claiming and honoring its past and engaging and honoring its griefs and conflicts
- recognizing its unique identity and its strengths, needs, and challenges
- clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
- making appropriate use of regional, UUA, and other outside resources
- proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

Ministers who have been admitted to this program and are currently involved in prescribed training are referred to as Accredited Interim Ministers-in-Training (AIMITs). To learn about the requirements for admission to and completion of this program, see Appendix E.

The number of congregations requesting interim ministers always exceeds the number of AIMs and AIMITs available. The gap is filled by ministers in various circumstances: new seminary graduates, transfers into our ministry from other denominations, returnees to the parish from other work, recent retirees seeking only temporary posts, and ministers growing restive or discontented in their current settlement and believing a year's temporary position preferable to continuation in place. The UUA provides a three-day Transitional Ministry Orientation for ministers about to do interim ministry for the first time, conducted by the Interim Ministry

Network. The cost of the Orientation is usually covered by the congregation with the cost of travel coming from the minister's professional development funds.

The Transition Team

Interim ministers bring a consultant's approach and a consultant's skills—and need the access and assistance that will make their ministry as effective as possible. Thus interim ministers need full access to several years of financial and stewardship information, including pledges made and pledges paid. They need, too, a Transition Team: five to seven members who are widely known and respected and well acquainted with the congregation's history. Their role is to provide the Interim Minister with insight, organizational and facilitative talent, and willing hands as the ministry proceeds. Because the Transition Team is an interim minister's "brain trust," it would be inappropriate for any member of the Team to have served on the Committee on Ministry during the previous ministry or to be in relationship with a current member of the governing board. During the interim period any existing Committee on Ministry should thus be suspended. The Transition Team's first duty is to set up early meetings between the interim minister and important congregational leaders: every member of the governing board, every committee chair, every other person the Transition Team views as a leader, and every paid staff member—as well as the Ministerial Search Committee (if yet formed) and the Transition Team itself.

Finding and Hiring an Interim Minister

Your regional staff provides guidance during the interim search period. They will 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. The video is also available directly from our homepage for flexible viewing.

If your congregation has already been in touch or even met with your local Ministerial Settlement Representative please remember that this person is of great use to you during your search for a called minister only. For questions during the interim search you are advised to contact your regional staff or the Transitions Office; the MSR is not trained to answer interim process questions.

Unlike a called minister, whose "call" comes from the congregation as a whole, interim ministers are hired by the governing board. Because an interim minister's placement is only temporary, because the time between the minister's announcement of departure and the interim's desired arrival is short, and because the demand for AIMs, AIMITs, and other experienced interim ministers exceeds the supply, the interim hiring process is simple, brief, and competitive. For the usual August start, applications received in the Transitions Office by the April due date that meet the conditions described in "Compensation and Other Contractual Matters" (below) will be eligible for the early preference pool for AIMs and AIMITs. Otherwise, applications will receive first come, first served consideration.

The Transitions Director strives to supply to each congregation a list of all interim ministers who have expressed interest. A congregation interested in being served by a particular interim minister is asked to direct its interest to the Transitions Office, not to the minister.

Ministers are specifically discouraged from *sub rosa* politicking among congregations for an interim position.

Step-by-Step Guide

The governing board . . .

- votes to hire an interim minister
- submits an on-line Application for an Interim or Consulting Minister (Appendix A)
- appoints an interim task force, often a board subcommittee, to identify and recommend to the board the appropriate interim minister
- covenants with the departing minister around the manner and timing of departure

The interim task force . . .

- readies an informational packet
The task force's packet will include: several recent orders of service, several current newsletters, the annual report, budgets for the current and preceding years, the by-laws, a church directory, any current short- or long-range plan, the departing minister's resignation announcement, the proposed interim contract, the names of UUA regional or other UUA staff members familiar with the congregation as references, and information on the locale

The prospective interim minister . . .

- completes a Ministerial Record on the Settlement System
- submits the Application for an Interim or Consulting Ministry Position (Appendix F)
- readies an informational website or electronic packet
The minister's packet will include: sermon texts, sample newsletter articles, perhaps a reflection on the role of the interim minister, the names of leaders of current and former congregations as references, and a photo that may be used for publicity purposes if agreement is reached

The Transitions Director . . .

- lists interested ministers, making their Ministerial Records available online to the task force beginning in the first week of May. *Specific date noted annually in application confirmation sent to task force in early April.*

The interim task force . . .

- after studying the Ministerial Records, determines its interest in each minister, and delegates one member to call each to discover if interest is reciprocated
- exchanges search websites or electronic packets with ministers in whom it is interested
- reviews the websites or packets and calls all references, including UUA Regional Staff of the candidate's current region, whether listed as a reference or not. Questions appropriate for references and potential ministers are a work-in-progress. No list is available currently.
- conducts an interview, face-to-face or by conference call, all committee members present, with each minister with whom there is mutual interest, reviewing the proposed contract as part of the phone conversation

- decides upon its favored candidate and informs the minister of its decision. *To insure adequate deliberation, we ask that no offers be made or accepted before noon Eastern time on Friday two weeks after Ministerial Records were released. Specific date noted annually in application confirmation sent to task force in early April.*
- with the minister's acknowledgement, calls additional references it may have turned up in speaking with the references the minister provided
- with the minister, executes and exchanges copies of the contract, subject if necessary only to approval by the governing board and a satisfactory criminal records background check (if not completed by the signing date)
- conducts criminal records background check of the minister
- if desired, within the week brings the minister into town at the congregation's expense; this visit can also include a search for rental housing
- presents the minister to the board in conjunction with this visit, if any, or otherwise immediately

The governing board . . .

- satisfies itself that the task force has done an adequate job of checking reference and conducting a background check
- reviews and acts on the recommendation, up or down
- if the decision is affirmative, approves the contract, negotiating within hours such points as may remain
- e-mails a copy of the contract to the Transitions Office
- if the decision is negative, directs the task force either to seek agreement with its second choice or to ask the Transitions Director for an additional list

The incoming interim minister . . .

- once having the board-approved contract in hand, terminates talks with other interim task forces
- contacts the departing minister to coordinate the "changing of the guard"
- contacts the regional staff to begin a collaborative relationship

Compensation and Other Contractual Matters

Some years ago interim ministers were compensated at the rate of the departing minister. This is no longer the case. The UUA's comprehensive compensation guidelines apply to all ministers: interim, settled, and consulting. See the "[Fair Compensation Calculator](#)" on the Transitions website for details. Also recommended is an additional amount to cover attendance at and travel to a UUA-sponsored transitional ministry continuing education event. See Appendix B below for the recommended contract itself.

The contract is brief, as befits an engagement arrived at with dispatch. Note that it incorporates by reference the customary relationship between a minister and a congregation, and the obligations of each, as described in Model Agreement B in *Joint Recommendations Concerning Ministerial Agreements*.

Because AIMs and AIMITs spend half the summer each year in the arduous task of relocating, often seeking to counteract the loneliness of their chosen field by maintaining a

permanent residence to which they return for renewal, and because other ministers serving in an interim capacity are generally in search for a permanent settlement, needing time for pre-candidating weekends and, if all goes well, a candidating week during the spring, the Transitions Office recommends that all interim ministers be granted eight weeks of paid vacation. One common arrangement in the case of AIMS is for a congregation to pay its departing minister through July and to pay the interim minister from August through the following July, with the initial and final months designated as vacation. Another is to contract with the interim minister for September through August, with July and August taken as vacation. Similar in result but more flexible still is for a congregation to contract with its interim for ten months of service, paying for it over twelve months.

When a congregation hires a minister who must relocate in order to reside within fifty miles of the church to be served, the church should expect to provide 100 percent of all eligible relocation actually incurred, up to 10 percent of salary plus housing. Eligible expenses include the minister's transportation to the interim site by air, rail, or car, with lodging en route, and moving by a licensed moving company of the minister's professional materials, personal items, household effects, and automobile. It is the minister's responsibility to keep accurate records and accompanying receipts.

Interim ministers who maintain a permanent residence outside of the locale in which they serve may wish to treat many of their expenses as tax-exempt reimbursable business expenses under IRC Secs. 949-954A. Richard Hammar's *Church and Clergy Tax Guide* or C.C.H.'s *U.S. Master Tax Guide* should be consulted. The congregation may wish to seek its own tax advice.

For additional information see "Compensation Guidelines." Below.

The Interim Period Begins

The education of a congregation about the opportunities that lie before them in the interim period, and the role of the interim minister in helping the congregation to seize the day, is not the work of a single newsletter article only. The governing board can make the interim period immeasurably more productive by witnessing, in various ways and in various settings, to the opportunity the interim period offers to become accustomed to the inevitability of change.

At the same time, the arrival of the interim minister should be seen as an opportunity for the person-to-person ministry without which congregational life is an emotional desert. Assistance in getting settled, help in unpacking, a casserole, a street map, the name of a trusted doctor or dentist, the loan of furniture to an interim minister travelling light—such warmth and thoughtfulness will set the tone for a relationship of mutual care.

The Interim Minister and the Ministerial Search Committee

The effectiveness and integrity of the interim ministry rest upon the twin facts that the minister wasn't there before and won't be there long. To maintain the integrity of their role, *all* interim ministers pledge three things, without which no interim ministry contract will be considered valid:

- Every interim minister agrees not to become a candidate for that congregation's called ministry. This limitation both assures the interim process the time to complete itself, rather than terminating prematurely in the warmth of candidating, and it also avoids placing the interim minister in a crippling conflict of interest: only because the interim minister is in no way a candidate for a permanent position can the ability to speak in candor, without risk of reprisal be assured.

- Every senior or sole interim minister agrees not to serve a congregation for more than two years. These time limitations guarantee the interim minister's objectivity and create a beneficial sense of urgency; both the interim minister and the congregation are more likely to engage in creating healthy change if they know that their time together is short. In rare cases the period of service of interim MREs, associate, and assistant ministers may be extended, but only with the approval of the Transitions Director in consultation with UUA regional staff.
- Every interim minister agrees not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee. Again, the primary reason is to avoid giving one candidate (someone the interim minister may know) an unfair advantage—or disadvantage.

Nevertheless, the ministerial search committee is by no means abandoned. Its main source of counsel during its search is the Ministerial Settlement Representative. Jointly nominated by the UUA Regional Board and the Chapter of the UU Ministers Association, the MSR is a volunteer appointed by the Transitions Director to guide congregations in search. A collaborative relationship between the MSR and the interim minister will benefit the search committee in its work. The interim minister is encouraged 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 search committee's packet
- participating in a mock interview or acting as process observer as the search committee conducts a mock interview with a neighboring minister
- preaching on the nature and role of ministry
- witnessing for a realistic ministerial agreement and fair compensation

Any other involvement of the interim minister with the committee must be with the agreement of the MSR and the Transitions Director.

Interim Progress Appraisal

The Transitions Office requests that the governing board and the interim minister independently appraise the congregation's progress toward the goals set for the interim period. The two completed appraisals should be shared and then transmitted to the Transitions Office. Use the same form for the congregation's and the minister's appraisals. A link to the downloadable form may be found on the [Interim Ministry webpage](#). Appraisals are due after 6 months, after 12 months, and at the end of the second year of interim ministry. In the case of a three-year interim, a final appraisal should be conducted at the end of the ministry. A sample form for the process is appended (see Appendix G).

Mid-interim Progress Appraisals offer the opportunity of a mid-course correction to both the minister and the board. In addition to reviewing progress toward goals, the appraisal process can function as a valuable model of creative interchange between minister and congregation, giving the leadership essential practice, on a relatively "no-fault" basis, in providing constructive feedback to and receiving it from its minister in an (ideally) constructive way. Conducted in an

atmosphere of openness and candor, the appraisals should also address unvoiced expectations and assumptions, miscues, disappointments, and non-productive behaviors, in order to make the most of the interim period. End-of-interim appraisals, to be completed before the conclusion of the ministry, may be cursory unless the results are likely to be sharply different from the previous, mid-term appraisal.

Appraisals not shared with all who serve are without value. The Transitions Office is not interested in receiving after-the-fact complaints about an interim minister. No amount of hindsight can ever disentangle the tight interweave of congregational and ministerial responsibility for things not going perfectly. Whatever challenges or disappointments the interim period provides are best seen as learning opportunities for minister and congregation.

When the Transitions Office may be of further assistance, please e-mail or phone us. We are here to be of service in the “in-between” times.

Consulting Ministry

When Opportunities Knock

Practically speaking, any ministry that is designed to last longer than a few months and is neither interim nor called is a consulting ministry. A consulting ministry can be full-time or part-time; it can be in any ministerial position—senior and/or sole minister, associate or assistant minister, and MRE; it can be arranged by a congregation alone, with the assistance of regional staff, or with the assistance of regional staff in collaboration with the UUA Transitions Office. Consulting ministries are driven by local circumstances, local needs, and local opportunities, and there are degrees of opportunism and often entrepreneurship in their design and implementation. Consulting ministries often though not always expect the active involvement of the regional staff and sometimes other UUA personnel to assist the ministry in defining and attaining its goals. Here are some examples, expanded a bit from the briefer ones in the Introduction:

- A small, growth- and goal-oriented congregation wants to step beyond their current pastoral size and entrenched size dynamic, and within five years to call a minister to serve them as the program-sized church they wish to become. To assist them, they hire a ministerial “coach” with experience in program-sized church and size transition ministry. The DE, skilled in motivating congregational growth, assists with the goal-oriented contracting process and is asked to provide regular consultation to the consulting ministry.
- A small mid-sized congregation is committed to readying themselves to call a minister of color, Latina/o, or member of another historically marginalized group within three years. With the DE’s assistance they hire a consulting minister with a history of successful cross-cultural ministry, whose ministry will be to develop in the congregation the capacity to create the conditions for the success of a ministry of color. The UUA’s JUUst Change consultant works with the consulting minister and the congregation as they undertake challenging work together.
- A mid-sized congregation wants to call an associate minister in order to expand the services it offers. However, the last time they attempted this, the associate ministry failed within thirty months and the senior ministry not long after. With the new senior ministry well in place, with the assistance of their DE the congregation decides to hire an experienced “sod-buster” of a consulting minister to initiate the new position and take the punishment that may come with it. The plan to call a new minister in two years, once the ground has been cleared.
- A large mid-sized or large congregation receives notice that its associate minister is departing to become the senior minister in another large church. The timing is such that calling a successor immediately is not possible. Nor is interim ministry a good fit: interim skills would be wasted upon this stable congregation and its organized, articulate, and available senior minister. The board decides instead to hire a “hold the fort” consulting minister with the pastoral and program skills that are needed during a year of search.
- A small congregation with limited finances in a somewhat removed location is clear that it will be several years, if ever, before they can grow to the point of calling a minister. Yet they know that it is a rare church not served by a minister that grows. With the DE’s assistance they feel fortunate to find a young minister not thirty miles away who, with

two children and a well-employed partner, finds two-thirds time service just right for the present.

- A small church similarly removed geographically experienced the end of an eight-year ministry not long before. All attempts by the UUA Transitions Office to provide an interim minister prove in vain. With the Transitions Director's encouragement the ministry is reconceived as a consulting ministry, with the potential, after two years to thirty months, of the extension of a call. A minister who had earlier balked at uprooting self and family for only two years of service now finds the prospect attractive, and an agreement is reached.
- A small mid-sized congregation, long riven by endemic mistrust following untrustworthy conduct years before, shows signs of growing health. About to enter search once again, however, the leadership expresses concerns to the DE that old patterns may be waiting to reassert themselves. Together the DE and the Transitions Director suggest instead a consulting ministry of up to five years, the primary objective of which is to build on growing health and make trustworthy leadership possible once again. Together the DE and Transitions Director recommend to the search committee a carefully developed list of four ministers, each of whom feels committed to such a ministry and to teamwork with the DE.

Also relevant here are the needs of a congregation for an assistant minister. Because assistant ministers are generally hired rather than called, and because within three years they are usually either called to the associate position or go elsewhere, they have a lot in common with consulting ministers. They work under the direct supervision of a senior minister, usually with the proviso that they may be considered for a call after the passage of a stated period of time. The desire and ability to hire an assistant minister, as well as the need to do so, often come up later in the church year. The current assistant minister may have accepted a call to another congregation. Or, due to an unexpectedly successful stewardship campaign, what was not thought possible is in fact doable.

A Goal-Oriented and Collaborative Ministry

It has often been said of called ministry that during the first year the minister's job is to change nothing, but instead, to become deeply acquainted with these people and to learn to love them. Acquaintance and love are essential dimensions of any ministry, of course. In consulting ministry, they are present primarily in the context of the consulting minister's commitment to *consult*: to help the congregation progress toward the achievement of its key goals. Over time those goals will change, no doubt, but it is the present goals that matter, such goals as: "to grow in membership and service to members," "to fulfill our mission in the larger community," "to establish a trusting relationship with an ordained minister," "to learn to allow our leaders to lead." A consulting ministry that does not have a largely congregation-determined direction cannot be deemed a success. Thus the ultimate collaboration in consulting ministry is between the consulting minister and the congregational leadership.

As the foregoing vignettes show, however, collaboration is not limited to the consulting minister and the congregations s/he serves. Unitarian Universalist congregations are relational beings—related to their UUA region and related to the 1,000-plus other UU congregations in North America. Representing the congregations of the Region and Association of Congregations, the regional staff and the UUA Transitions Office work together and with

consulting ministers to create the conditions that will enhance congregations' abilities to achieve the goals they set for themselves.

The virtues of a consulting minister for the right congregation are these:

- A consulting minister is hired by and works for the board of trustees, not the congregation as a whole
- A consulting minister is hired to coach the board and congregation on fulfilling specific, stated objectives, such as:
 - engage the board and congregation in trust-building
 - work with the congregation on leadership issues, with the goal that the elected leaders be empowered
 - conduct a ministry in which trustworthiness is a leading characteristic
- A consulting minister is not held responsible for all aspects of congregational life: as some issues are musts, other issues are simply not part of the ministry, and the consulting minister is not accountable for them
- A consulting minister may work closely with the regional staff; in that event a covenant is recommended among consulting minister, regional staff, and lay leadership to work together on issues of trust-building, leadership, and congregational health
- A consulting minister, because of the accountability to the board, does not have the vulnerability to nay-sayers that a called minister has; not to say that s/he is invulnerable, simply that the consulting minister's vulnerability is reduced. The result of the minister being held hostage on extraneous issues is thus minimized.
- And finally, a consulting minister can be called. It is generally *advisable to contractually defer* calling the consulting minister until the ministry has been in being for thirty months at the least, so that there is a good long time during which the call is not the issue.

One prominent church consultant calls such a ministry a “developmental ministry.” Other metaphors: a “conditioning” ministry, or a “capacity-building” ministry. Often but not always, its purpose is to enable the next search committee, to be elected three or more years down the road, to go into search on behalf of a congregation that knows in its bones who it is and what ministry it needs to write the next chapter in its history.

Finding and Hiring a Consulting Minister

The scale of consulting ministry varies considerably: everything from one-quarter time service on the low end to full-time service on the high. Regional staff are key players in determining congregations' needs, identifying potential consulting ministers for them, and placing them. The UUA Transitions Office seeks to be as helpful as possible both to congregations and the regional staff. Congregations are most welcome to apply for a consulting minister on the UUA's on-line Ministerial Settlement System (see Appendix A), and thereby to gain access to the Ministerial Records of ministers the regional staff recommends to them as potential consulting ministers. The regional staff and the Transitions Office often work together to provide the search committee with a number of ministers who have the skills and the maturity and the commitment that the congregation needs.

Step-by-Step Guide

Phase I—three weeks to several months

1. Need becomes apparent by means of ministerial departure or other new opportunity.
2. Regional staff conducts transition interview with leadership (if a departure is involved).
3. In consultation with the region, the governing board decides on goal of search: kind of ministry needed (called, interim, or consulting) and leading characteristics and capabilities of the minister to be sought.
4. Compensation Consultant (CC) makes visit.
5. Board adopts search committee budget, commits to Salary plus Housing Allowance amount plus standard array of benefits and professional expenses.
6. Board selects consulting minister task force to identify candidate for recommendation to the board itself.

Phase II—three weeks to several months

7. Task force conducts focus groups and/or semi-structured interviews with appropriate committees.
8. Task force completes on-line Application for Interim or Consulting Minister, informing Transitions Office when is complete.
9. Task force creates informational packet for exchange with prospective candidates.
10. Task force prepares draft contract for board approval.
11. Regional staff and Transitions Director jointly decide on ministers to recommend; Transitions Office gives the Task access to their on-line Ministerial Records.

Phase III—four-eight weeks

12. Task force contacts recommended ministers and exchanges packets with those in whom it is interested.
13. Task force receives, circulates, and evaluates ministers' packets, conducts group phone interviews, checks references.
14. Task force requests additional MRs as necessary.
15. Task force selects potential candidate, notifies him/her of candidate status, checks additional references extensively, requests interpretative file summary from Transitions Office, conducts criminal record background check.

Phase IV—less than a week

16. Negotiating team and candidate conclude contract; candidate and board chair sign.

*A variant of this process may be used in order to search for an assistant minister.
Consult the Transitions Office about its best use.

The Consulting Minister Arrives

The cautions noted in “The Interim Ministry Begins” are equally valid here. In the early weeks and months of the ministry the regional staff should conduct a start-up workshop, for the purposes of ensuring 100% alignment on the ministry’s goals.

Calling a Consulting Minister Already Serving the Congregation

Consulting ministries are established for a host of reasons. A consulting ministry that is going well often inspires leaders to seek to convert it to a settled ministry by means of a ministerial call. While a UU congregation is of course free to call to its settled ministry a consulting minister already serving (or any other person, for that matter), it should only seek to do so when the objectives for which the original consulting ministry have been largely satisfied, and only after the passage of a significant period of time. The wise congregation will concentrate on the issues that brought the consulting ministry into being for two years to thirty months before beginning to consider extending a call.

There is no restriction on a consulting minister's permitting him- or herself to be so considered as long as in doing so the conditions of the UUA's "inside candidate" rule are met. Under the rule, a minister who is a member or staff member of a congregation may not accept a call after the Transitions Office has submitted a list to the search committee. Thus an inside candidate must apply to the search committee early in the process, and the search committee must make a yes-or-no decision before considering other candidates. In other words, the consulting minister can only be considered alone and not in competition with other ministers.

Before getting deeply into a call process, the congregation's bylaws should be reviewed. If odd or counter-productive bylaws make compliance a challenge, it's time to change the bylaws! The experience of regional staff and the Transitions Director suggests that generally, the call of a new minister should require at least a 90% vote (written ballots, absentee ballot ineligible), while for dismissal 30% should be sufficient. The threshold for calling a minister already on staff should probably be in the 85 percent range.

In the polity that characterizes Unitarian Universalist congregations, the Board and the called minister(s) are partners in leadership, both chosen by the congregation. With that relationship in mind, the Board would do well to shift the ownership of a potential call process from itself to the congregation. It will be the Board's task to hold the tension and the limbo of the process, without jumping in to try to manage it or fix it or "settle it" in a hurry.

In most instances, the Nominating Committee is the appropriate locus of responsibility for recommending the functional equivalent of a ministerial search committee to the congregation. The Board can ask it to create a slate of perhaps five candidates for a "Ministerial Transition Committee" or "Ministerial Options Committee." They can find guidance for their procedure in the UUA's *Settlement Handbook*, which outlines good characteristics for search committee candidates. It is conducive to an open and healthy process to add that during the meeting to elect the Ministerial Transition Committee, nominations from the floor will be accepted. Once again, check the by-laws for requirements on proper notice.

The Ministerial Transition Committee is responsible for "interviewing the congregation" for the next ministry. Whether the congregation chooses to call the consulting minister or not, there will be a new ministry. The Committee is responsible for interviewing the minister-candidate, too, as to what changes s/he would wish to bring about in her/his present role if called. It is up to this committee, just as with a search committee, to determine if the congregation's and the minister-candidate's desires match. They will or will not recommend that the congregation call that minister.

Assuming that the Ministerial Transitions Committee recommends the consulting minister for a congregational call, the Committee should conduct a full and formal candidating week as described in the *Settlement Handbook*: services on two successive Sundays, meetings

with committees, the Board, and the congregation as a whole, a vote by secret ballot—the works!
Only by this means will the minister and congregation truly know one another's mind.

Additional Information for Task Forces Compensation Guidelines

The largest single factor in determining a congregation's capacity to compensate ministers is the number of members: generally speaking, the greater the membership, the greater the financial resources available. Location, too, makes a substantial difference. Congregations in high cost areas tend to be made up of members able to afford to live there, and hence able to pledge higher amounts. The UUA's recommendations as to minimum ministerial compensation take both factors into account. The UUA has changed its approach to ministerial compensation: *from* a Total Cost of Ministry (TCM) model *to* a Salary plus Housing Allowance (S&H) model.

- The TCM approach named the total amount of dollars available to fund a minister's salary, housing allowance, retirement plan contributions, insurance premiums, and professional expense allowance. The implied question to which the TCM model provides the answer is: "Our congregation doesn't have a minister; how much would it cost us to call one?"
- The S&H approach names only the total amount of dollars available to fund a minister's salary and housing allowance. In addition, benefits and a professional expense allowance at standard levels are *assumed* to be part of the compensation package. Under this approach, then, clergy compensation is described in terms very close to those used in the non-church employment marketplace: as salary (including housing allowance) plus a standard array of benefits and professional expenses recommended by the UUA Compensation, Benefits, and Pension Committee. The implied questions to which the S&H approach provides the answers are: "How much are we paying our minister?" and "How does that compare to what other people get paid?" For decades, the TCM approach has provided a stumbling-block to a congregation's ready comprehension of what a minister was actually getting paid. That should no longer be the case. And because the UUA Board recommends compensation levels for all church staff, ministers included, expressed in terms of salary (and housing) and benefits, it only makes sense that the Transitions Office follow suit.

The "[Fair Compensation Calculator](#)" on the Transitions webpage gives comprehensive guidance to congregations offering UUA-recommended compensation.

Note to interim task forces: *Due to the expertise brought to the interim ministry by Accredited Interim Ministers (AIMs) and AIMs in Training (AIMITs), congregations wishing to hire such a minister are expected to offer compensation at the midpoint or above and to offer the recommended benefits and expenses below. If an AIM or AIMIT is not secured, a reasonable adjustment should be made to reflect the experience level of the minister that is hired.*

Confidentiality

Confidentiality is not secrecy. The task force can publicize the process it is following and how far along it is at every point. At the same time, the task force must keep confidential both the names and the locations of the ministers under consideration and the details of task force business. There are several reasons for the rule of confidentiality:

- Ministers settled in a congregation may not have told their present parishioners that they are contemplating a move. These parishioners are entitled to hear the news from their own minister at the appropriate time. To “leak” a minister’s name can undermine his or her ability to serve the present congregation, and will almost certainly damage a congregation’s chances of attracting that potential candidate.
- When the identities of unsuccessful applicants are known, it heightens the competitive aspect of the search process. This hurts collegial feeling among ministers and (when neighboring congregations compete for the same minister) also can create hard feelings among congregations.
- It is harder to resolve differences among the members of a task force when factions of the congregation are looking over its shoulders. It is better to resolve differences in private.

The congregation usually takes the search committee’s lead on confidentiality. If task force members take their obligations seriously and are consistent in keeping confidential matters to themselves, others will not pry.

When the task force begins exchanging packets it will discover that keeping confidences is not merely a personal, but also a logistical challenge. A locked room in the church to which only search committee members have keys can be a great help.

Ministers not in fellowship

Member congregations of the Unitarian Universalist Association are of course free to hire or call and to ordain to their ministry any person they choose, including persons not in fellowship with the UUA. The UUA does not withhold services or otherwise discriminate against congregations that do so. The Transitions Office is not, however, in a position to assist congregations in determining the fitness for ministry of such persons. Congregations considering this most unusual step should plan to consider the following questions at some length:

- To what degree is the person under consideration familiar with liberal religion, its history, its theologies, and its polity?
- Will the person under consideration be capable of holding high the standard of liberal religion in interfaith circles and in the public square?
- To what degree is the person under consideration committed to pursuing UU fellowship, independent of the present position?
- To what extent is it about money—obtaining ministry services at a discount for the congregation, and getting paid for what looks like enjoyable work for the person under consideration?

Frequently Asked Questions

Telephone interviews

Q: Are there any special guidelines about telephone interviews?

A: Telephone interviews may help you narrow your list of possible candidates. Remember that the ministers will judge your congregation partly by the consideration you show in interviewing them. To call suddenly at mealtime and announce that your committee is around a speaker-phone may feel to the minister like an interrogation in a dark room. Some ministers will have the poise to handle the challenge well, but few will think better of you for it.

The first rule in any interview is to negotiate the format. A phone call or email in advance to ascertain the minister's preferences goes far to ensure that your prospect feels relaxed and prepared to give you a good interview.

If you wish to include the whole task force in a phone interview, it probably is best to designate one or two members to do all the talking. Others can contribute questions and hear the answers.

Personal questions

Q: I work in personnel and am aware of many laws governing employment interviews. Can we ask about the spouse and children, health problems, addictions, disabilities, sexual orientation, and other personal matters?

A: In both the United States and Canada, churches are allowed wide latitude in the selection of their spiritual leaders, the relationship between minister and congregation being more than an employment contract. You are entitled to know the minister personally and to know how the minister presents his or her personal life in a professional context. Also, to the extent that a personal matter is publicly known in another congregation, you will need to be prepared for the possibility that it may surface in yours. Personal conversation that would be out of place in a business setting is accepted when a task force interviews a minister.

At the same time, Unitarian Universalist congregations are generally committed to equal opportunity for everyone, and do not want even to appear to discriminate on the basis of age, ability, race or ethnicity, sex, sexual orientation, or gender identity. You will likely want to reassure potential candidates that you respect their need for privacy and do not regard ministerial family members as auxiliary church staff. If there is something of a personal nature that is of concern to you as a task force, think carefully about how to phrase your question. If possible, base your query on something the minister has said or written. Probably you will not wish to ask a woman anything you would not ask a man, or a minister of color or member of a traditionally marginalized group anything you would not ask one of Euro background.

Relate your question to the minister's professional performance, where it belongs. Is your question, "Will your wife's career require you to take time away from work to take care of your children?" or is it, "How do you balance the demands of parenthood and ministry?" Is your question, "With your background, how would you fit into a wealthy white suburb?" or is it, "What special challenges do you see in ministry to our community?" Is your question, "Won't a gay minister scare away young parents?" or is it, "How would you help us to respond to people who are frightened about having our first gay minister?"

As a rule, it is better to let the minister bring up a personal topic first. If, after interviewing a candidate for several hours, you are still concerned about a personal matter that might affect his or her reception by the congregation, by all means ask. When asked a personal question, most ministers will respond candidly or explain gently why they prefer not to.

Remember, though, that what you are legitimately interested in is not the minister's personal life, but the way that life affects the ministry.

Low-ball salary offers

Q: Where I work, job openings always list a range of salaries, depending on the qualifications and experience of the person chosen. We would like to list our ministry position that way, too. Can we?

A: Yes. In fact the application process encourages your doing so. Evaluating qualifications and experience, of course, is the hard part. Presumably you want the best minister for your congregation. If that turns out to be a new minister who has nevertheless gathered many of the fruits of experience in a short time and shows promise of gathering many more, that minister may merit compensation significantly above the minimum. Accredited Interim Ministers are encouraged to garner salaries at the mid-point of the appropriate range.

Procedures for Ministers

Short-Term Ministerial Placement Is Different!

The UUA's settlement process for called ministry is rich in information, *laissez-faire* in spirit, and deliberate in pacing. By contrast the placement process for interim and consulting ministry is scanty as to information, constrained as to choice, and rapid:

- Congregations seeking to fill an interim position do not complete Congregational Records. Your sources of information are thus the departing minister, previous settled and interim ministers, and regional staff. The Transitions Office may or may not have relevant information, according to the circumstance. And don't forget the congregation's website! Some congregations seeking to fill a consulting position will complete a CR, and some will not; check the Congregational Records Posted site.
- Ministers can permit themselves to be considered by an interim or consulting task force only when they are recommended by the Transitions Director. The Transitions Director requests preferences as to particular congregations from AIMs, AIMITs, and long-term settled ministers. Other ministers are asked for preferences as to areas in which they will or will not consider serving. The greater a minister's geographical flexibility, the more the opportunities for service.
- Between the Transition Director's earliest recommendations and the date on which task forces can make a minister an offer, a period of deliberation of 2 ½ weeks is imposed. Second (and third, and fourth) round recommendations feature no such pause. Ministers recommended during these rounds find the tempo sometimes breakneck, sometimes annoyingly dilatory.

Steps to Take in Securing an Interim or Consulting Ministry

- Using the online Settlement System, complete your Ministerial Record (#1 on the menu after you log in). If you don't have an account (and thus cannot log in) to the Settlement System, refer to "How to Go Online" on our [homepage](#).
- Using the Settlement System, complete an application for ministry (#2) and application for interim/consulting ministry (#8).
- Monitor your Settlement System site regularly for new matches with potential congregations (#9). React according to personality—initiate first contact or to allow the interim/consulting task force to do so.
- Monitor the *Opportunities for Ministry* site (#7) for an up-to-the-minute listing of available openings. If the position is not listed, it is not yet public. Positions are listed by "(interim)" or "(consulting)".
- If you are interested in a consulting position that is listed on the Congregational Records Posted site (#4), express interest at the foot of the congregation's CR and watch for the match to be formalized on your website (#5).
- Prepare a search packet to be exchanged with interim/consulting task forces. The minister's packet will include: sermon texts, sample newsletter articles, perhaps a reflection on the role of the interim minister, the names of leaders of current and former congregations as references, and a photo that may be used for publicity purposes if agreement is reached.

- Eligible interim applications will be considered in the first round of recommendations, to be made starting in mid-April via a Settlement System link between minister and congregation. Eligible applicants include ministers in the Accredited Interim Ministry program and ministers departing from a long-term settled ministry, at the discretion of the Transitions Office. All other ministers are encouraged to apply by April 1 as well but should not expect to be recommended until at least early May. Applications can be submitted at any time during the interim search process which typically lasts until the early autumn.
- As task forces are asked to refrain from making an offer of a candidacy until approximately two weeks after receiving names, so ministers are asked to refrain from accepting a candidacy until that date. Once the date has arrived a task force can offer their position to any minister on their list. A second round with a similar time schedule follows. Subsequent rounds feature no such pause, and the process often moves briskly.
- **For the specific dates governing this process in any give year, please see the cover of this manual.**

A Note on Part-Time Service

Many congregations offering part-time ministry positions work with the regional staff, and some post a Congregational Record, as well. You should file your Ministerial Record and Application for Ministry Position with the Transitions Office, and also be in touch with the regional staff in areas where you might like to serve. Notice, however, that UUA publications do not use the term “part-time minister.” A congregation’s minister is its minister, whatever the hours worked!

Essential Resources

We recommend that ministers seeking interim or consulting positions read this manual in its entirety, but if time is short the following sections are essential:

- “The Interim Minister and the Ministerial Search Committee” (p. 8)
- “Interim Progress Appraisal” (p. 9 and appendix G)
- “Interim Ministry Contract” (appendix B) or “Consulting Ministry Contract” (appendix C) and “Memorandum of Consulting Minister’s Duties” (appendix D)
- “Application for an Interim or Consulting Ministry Position,” *to be completed online* (appendix F)
- For potential long-serving interim ministers: information on the Accredited Interim Ministry Program (appendix E)
- For persons in candidate status: “When Ministers Are Scarce” (p. 2)

Appendix A

Copy of Application for a Congregation Seeking an Interim or Contract Minister

The actual application must be completed in the [Settlement System](#). Contact transitions@uua.org if you need help accessing the system.

- *For an interim minister, the online application will act as your Congregational Record. No need to complete the longer Congregational Record.*
- *For a contract minister, please consult with your [regional staff](#) who will advise if you should also complete a Congregational Record.*
- Contact the Transitions Office to request an application for a Developmental Ministry. (transitions@uua.org).

Basic Information

Congregation Name: _____
Congregation City: _____
Congregation State: _____
Congregation Country: _____
Beginning date of ministry: _____
Duration of ministry: _____ (Drop-down: 18 months, 2 years, Other) Specify Other: _____

Official Decision:

Date Governing Board voted to move forward on interim ministry: _____
Date congregation voted to approve interim ministry (if applicable) _____

Congregational Information:

Number of adult members: _____
Average Sunday attendance: _____
How many Sunday services? _____
List starting times: _____, _____, _____
Other worship (list date and time) _____
Children and youth enrollment: _____
Average children and youth attendance: _____
Children's participation in Sunday service: _____ (Drop down: weekly, almost always, monthly, rarely, never)
How often do you have complete intergenerational service in a year? _____
Is there a Youth group? _____ yes or no
Is there a Campus group? _____ yes or no
Percentage of Young Adults participation in congregation (best estimate, ages 18-30) (Drop down: Sizeable -10% or more, Noticeable – 5 to 10%, Small – 1 to 5%, Little to None – 0 to 1%)

Is there any other regularly scheduled Sunday morning event(s) that happen other than worship and programming for youth and children? Please list events and times _____

Community Demographics:

Town / City Population: _____

Metropolitan area and population (if applicable): _____

Town / City Demographics:

_____ % White

_____ % African-American/Black

_____ % Native American / American Indian / Native Alaskan

_____ % Asian

_____ % Native Hawai'ian / Pacific Islander

_____ % Other

_____ % Two or more races

_____ % Hispanic / Latina / Latino

Congregational Demographics:

People of Color: _____ (Drop down: Sizeable -10% or more, Noticeable – 5 to 10%,
Small – 1 to 5%, Little to None – 0 to 1%)

BGLT: _____ (Drop down: Sizeable -10% or more, Noticeable – 5 to 10%,
Small – 1 to 5%, Little to None – 0 to 1%)

People with disabilities: _____ (Drop down: Sizeable -10% or more, Noticeable – 5 to 10%,
Small – 1 to 5%, Little to None – 0 to 1%)

Accessible: Are the congregation's meeting spaces: (Drop down: Completely accessible, partially accessible, not accessible)

Is the congregation recognized as an official Welcoming Congregation: _____ (Drop down: yes, no, in process) If yes, when? _____

Are there assisted listening devices for congregants who are hard of hearing? _____ Yes or No

Is the congregation officially recognized Green Sanctuary congregation? (Drop down: yes, no, in process) If yes, when? _____

Finance and Church Size:

Total operating expenditures: \$ _____

Total operating pledge income: \$ _____

Number of pledge units: _____

Is pledging required for membership: Yes or No

Compensation:

Congregation Size (I-VI): _____ (Drop Down: Small (0 – 149)

Mid-Sized I (150 – 249)

Mid-Sized II (250 – 349)

Mid-Sized III (350 – 499)

Large I (500 – 749)

Large II (700 up)

Congregation Wage Rate Area (1-5): (Drop Down: 1, 2, 3, 4, or 5)

Salary plus Housing offered (if no range): \$ _____

Salary plus Housing offered (if a range): \$ _____ Minimum

\$ _____ Midpoint

\$ _____ Maximum

Do the benefits and professional expenses provided for this position meet (or even exceed) the Transitions Office Compensation Guidelines? *Note that the estimated cost of the benefits and expenses is another 35-40%* _____ Yes or No

(If No, please explain)

Is the interim minister expected to occupy a parsonage? _____ Yes or No

If so, how much of the S&H is attributable to rental value? \$ _____

To Utilities \$ _____

Median monthly rent for two-bedroom apartment in the congregation's vicinity: \$ _____

Is public transportation a viable option? _____

Ministerial History

History with ministers (list last 10 or as far back as 1970): Include Minister, Type of Ministry (*Settled, Interim, Other*), and Tenure (*List years served*)

Reasons for departure of last three settled ministers

Staff

Other ministers on staff: _____ Yes or No

Other full time staff positions: _____ Yes or No

Other part time staff positions: _____ Yes or No

Congregational Needs and Strengths:

What are the strengths of this congregation? (List 5)

What areas of focus are needed for the interim ministry?(what needs attention, where is there conflict, what are the challenges? List up to 5)

Desired strengths of an interim minister (List up to 5)

Current areas of momentum that should not lose steam during the interim time: (List up to 5)

What current traditions or programs do you wish to maintain: (*List up to 5*)

Name of Board President:

Board President Email:

Names of Interim Task Force Members:

Contact Information

Contact Name: _____

Phone: (work): _____

Phone: (cell): _____

Phone: (home): _____

email: _____

Remember: This form must be completed in the online Settlement System. If you need assistance, please send an email to transitions@uua.org.

IF AN INTERIM MINISTRY POSITION, THE CONGREGATION SHOULD BE PROVIDED WITH THE FOLLOWING STATEMENT BEFORE THE INTERIM MINISTRY PROGRAM IS VOTED

It is understood, in accordance with the established policy of the Unitarian Universalist Association, that the interim minister is pledged not to become a candidate for the congregation's called ministry, not to serve the congregation for more than two years (with a limited exception for interim ministers of religious education and interim associate and assistant ministers), and not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee.

It is also understood that interim ministers both carry out the normal responsibilities of congregational ministry, including worship and pastoral care, and also assist the congregation in addressing the following interim tasks:

- claiming and honoring its past and engaging and acknowledging its grief and conflicts
- recognizing its unique identity and its strengths, needs, and challenges
- understanding the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
- making appropriate use of regional, UUA, and other outside resources
- renewing its vision, strengthening its stewardship, preparing for new growth and new professional leadership, ready to embrace the future with anticipation and zest

Appendix B
INTERIM MINISTRY CONTRACT
recommended by the Transitions Office
Unitarian Universalist Association

This is an agreement between the Rev. _____,
hereinafter the "Interim Minister," and the Governing Board of _____,
hereinafter the "Governing Board."

1. The Interim Minister agrees:

1.1 To serve as interim minister of the Congregation for the period beginning _____ and ending _____ .

1.2 To carry out the normal responsibilities of congregational ministry, including worship and pastoral care, and also assist the congregation in addressing the following interim tasks:

1.2.1 claiming and honoring its past and engaging and acknowledging its grief and conflicts

1.2.2 recognizing its unique identity and its strengths, needs, and challenges

1.2.3 understanding the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition

1.2.4 making appropriate use of regional, UUA, and other outside resources, and

1.2.5 renewing its vision, strengthening its stewardship, preparing for new growth and new professional leadership, ready to embrace the future with anticipation and zest

1.3 Not to become a candidate for the congregation's called ministry until at least three years after the interim ministry's end, not to serve the congregation for more than two years without the approval of the Transitions Director, and not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee.

1.4 To attend an annual UUA-sponsored continuing education event:

- a. Orientation to Transitional Ministry or its equivalent for a first-time interim minister
- b. Accredited Interim Ministry Seminar for an Accredited Interim Minister or AIM in Training.

2. The Governing Board agrees to provide the following compensation, benefits, and professional expenses:

2.1 Salary plus Housing Allowance (S&H), payable monthly on or before the fifteenth day of each month, beginning on July 15, 20__).

2.1.2 Salary of \$_____.

2.1.3 the Governing Board will consider the minister's request that a portion of Salary be designated Housing Allowance once the minister has ascertained the likely domiciliary costs to be incurred, or the Interim Minister shall have free use of the parsonage at *[insert address]*, including the utilities and furnishings listed in the appendix. All reasonable and necessary maintenance and repairs will be performed promptly at the Congregation's expense. The fair rental value is estimated at \$_____.

2.2 Benefits

2.2.1 In lieu of employer's FICA, at 7.65 percent of S&H, payable monthly.

2.2.2 Retirement plan contribution made by due date to the Unitarian Universalist Organizations Retirement Plan and/or other appropriate pension plan, of at least 10 % of total Salary and Housing.

2.2.3 Insurance premiums:

2.2.3.1 Medical insurance: 80 % of premium for the Interim Minister and 50% of premium for spouse/partner and dependents

2.2.3.2 Long term disability income insurance for the minister, 100 % of premium

2.2.3.3 Group term life insurance for 2 times Salary plus Housing

2.3. Professional and out-of-pocket expenses: The greater of 10 % of S&H or \$5,000 plus an additional \$700 plus travel expenses for a UUA-sponsored transitional ministry continuing education event, payable promptly on voucher by the Interim Minister in accordance with an Accountable Reimbursement Plan developed jointly by the Interim Minister, President, and Treasurer. In addition to that event (see "The Interim Minister agrees" #4 above), other expenses for reimbursement include, but are not limited to, travel, automobile mileage, lodging, meals, incidentals, conference registration, entertainment, pulpit gowns, books, periodicals, dues, office equipment such as computers, and other continuing education events. It shall be the practice of the Congregation to reimburse such expenses at the maximum rate allowed by the tax laws.

2.4. The total cost to the congregation of salary and housing plus the additional benefits and professional expenses is \$_____. The Governing Board and the Minister may, upon mutual agreement, and before the beginning of a tax or employment year, allocate funds among various categories to provide the minister with an optimum array of benefits. The congregation is strongly urged to require the minister to participate in pension, health, and long term disability income insurance plans.

2.5. To reimburse the Interim Minister up to a maximum of \$ _____ (*10 percent of Salary plus Housing Allowance is recommended*) for all eligible relocation expenses actually incurred in relocating from _____ (*Interim Minister's present residence*) to a location in or near _____ (*location of Congregation*). Eligible expenses include transportation of the Interim Minister by air, rail, or car, with lodging (reasonable local rate) in route, and moving by a licensed moving company of the minister's professional materials, personal items, household effects, and automobile.

2.6. To relieve the Interim Minister of all responsibilities and to permit her/his absence from the area for a total of eight weeks of paid vacation during the contract year. The Minister shall be credited with 10 sick days on the first day of interim service for each 12 months of the interim, prorated as necessary for a partial year served. Up to 10 days of accrued sick leave may be carried forward each year, but in no case may the balance exceed 20 days. Sick leave may be used for the minister's illness or for the illness of a member of the minister's immediate family.

2.7. To regard the Interim Minister's time spent in participating in regional, UUMA, and UUA events as part of his/her professional responsibilities.

2.8. To cooperate fully with the Interim Minister in the performance of his/her duties. The Interim Minister shall have freedom of the pulpit, and shall use his/her time as he/she deems necessary for the best fulfillment of this interim ministry.

2.9. To give the Interim Minister access to all financial and stewardship information.

2.10. To appoint a Transition Team consisting of five to seven members of the congregation who are well-known, widely respected, and not members or spouses/partners of members on the previous Committee on Ministry or current Governing Board.

3. It is further understood that:

3.1. In the event the Interim Minister is incapacitated during the term of this agreement, the Governing Board will continue the above payments for 30 days only if the disability occurs in the first two months of the agreement, and 90 days only if the incapacitating disability occurs thereafter.

3.2. In the event that the Interim Minister resigns during the contractual period, s/he will give at least 90 days notice (less if by mutual agreement) and will return any relocation expenses received. In the event that the congregation decides to terminate the interim during the contractual period, the congregation will give at least 180 days notice (less if by mutual agreement) of intent to dismiss.

3.3. Except for the departures specifically noted herein, the expectations of the Interim Minister and the Congregation are those described in Model Letter of Agreement, Sec. 2 of *Joint Recommendations Concerning Ministerial Agreements*.

3.4 All notes, research, sermons, and other products of the minister's work shall be the sole property of the minister.

3.5. List here any modifications to the Interim Minister's office that have been agreed upon:

4. Include here any additional expectations that have been agreed upon:

A signed copy of this contract shall be sent to the Transitions Office, Unitarian Universalist Association, 24 Farnsworth Street, Boston, MA 02210-1409.

This contract represents an official offer to the Interim Minister when her/his hiring is approved by the Governing Board.

For the Governing Board: _____
(signature)

Name and title: _____ **Date approved:** _____

Interim Minister: _____ **Date Accepted:** _____

Appendix C
Consulting Ministry Contract
Recommended by the Transitions Office
Unitarian Universalist Association

This is an agreement between the Rev. _____, hereinafter referred to as the “Consulting Minister,” and the Governing Board of _____, hereinafter referred to as the “Governing Board.” The purpose of this agreement is to create the conditions under which the Congregation will progress toward the achievement of its key goals: _____ (e.g. “to grow in membership and service to members,” “to fulfill its mission in the larger community,” “to establish a trusting relationship with an ordained minister,” or other).

The Consulting Minister agrees:

1. To serve as consulting minister of the Congregation beginning _____ and ending _____, and to serve _____ (e.g. one-quarter, one-half) time.
2. To observe the service priorities agreed upon jointly with the Governing Board as set forth in the attached memorandum.
3. To adhere to the *Code of Professional Practice* and the *Guidelines* of the Unitarian Universalist Ministers Association.
4. To observe a ministerial schedule which places the Consulting Minister in _____ [*insert location of the congregation*] for periods of approximately _____ days around the _____ (e.g. second and fourth) Sunday(s) of each month. Variations may be agreed upon e.g. to accommodate a holiday service or special observance. The Minister further agrees to be reasonably available for consultation or pastoral care by telephone or e-mail at other times while away from the congregation’s locale.
5. To be available while in the congregation’s locale, performing most sermon research and writing at home.
6. To be available for extraordinary service with the understanding that either the Governing Board or individual members will provide compensation and expense reimbursement for such additional service.

The Congregation agrees:

1. To provide the following compensation, benefits, and professional expenses:
 - A. Salary plus Housing Allowance (S&H), payable monthly on or before the first day of each month, beginning on July 15, 20__).
 - 1) Salary of \$_____.
 - 2) a) the Governing Board will consider the minister’s request that a portion of Salary be designated Housing Allowance once the Consulting Minister has ascertained the likely domiciliary costs to be incurred, or
b) the Governing Board will provide suitable housing during the Consulting Minister’s scheduled time in the congregation’s locale. The housing shall include reasonable privacy and the capacity to arrive and depart at all hours without major intrusions on the hosts if in a private home, and shall be suitable for the

Consulting Minister's spouse partner to stay during that time. The fair rental value is estimated at \$_____.

B. Benefits

- 1) In lieu of employer's FICA, at 7.65 percent of S&H, payable monthly.
- 2) Retirement plan contribution made by due date to the Unitarian Universalist Organizations Retirement Plan and/or other appropriate pension plan, of at least 10 percent of total Salary and Housing.
- 3) Insurance premiums:
 - a) Medical insurance: 80 percent of premium for the Consulting Minister (50% of premium for spouse/partner and dependents is strongly encouraged)
 - b) Disability income insurance for the Consulting Minister, 100 percent of premium
 - c) Group term life insurance for 2 times Salary plus Housing

C. Professional and out-of-pocket expenses: The greater of 10 percent of S&H or \$5,000 plus an additional \$500 plus travel expenses for a UUA-sponsored transitional ministry continuing education event, payable promptly on voucher by the Consulting Minister in accordance with an Accountable Reimbursement Plan developed jointly by the Consulting Minister, President, and Treasurer. In addition to that event (see "The Consulting Minister agrees" #4 above), other expenses for reimbursement include, but are not limited to, travel, automobile mileage, lodging, meals, incidentals, conference registration, entertainment, pulpit gowns, books, periodicals, dues, office equipment such as computers, and other continuing education events. It shall be the practice of the Congregation to reimburse such expenses at the maximum rate allowed by the tax laws.

2. The total cost to the congregation of salary and housing plus the additional benefits and professional expenses is \$_____. The Governing Board and the Minister may, upon mutual agreement, and before the beginning of a tax or employment year, allocate funds among various categories to provide the minister with an optimum array of benefits. The congregation is strongly urged to require the minister to participate in pension, health, and long term disability income insurance plans.
3. To relieve the Consulting Minister of all responsibilities and to permit her/his absence from the area for a total of _____ weeks of vacation and _____ weeks of study leave during the period of service.
4. To provide suitable office space for meetings, work, and counseling, and appropriate office equipment (including telephone service, a computer and printer and modem, copier access and similar materials) to serve and communicate with members and friends of the Congregation and on behalf of the Congregation.
5. To form a Committee on Ministry to assist the Congregation and the Consulting Minister in assessing and affirming vibrant ministry.
6. To re-examine this contract with the Consulting Minister at least annually in January with specific consideration given to the renewal of the contract for an additional year.
7. To cooperate fully with the Consulting Minister in the performance of his/her duties. The Minister shall have freedom of the pulpit and shall use his/her time as s/he deems necessary for the best fulfillment of the Consulting Ministry consistent with the written memorandum of service priorities.

It is further understood that:

1. In the event the Consulting Minister shall be incapacitated during the term of this contract, the congregation will continue the above payments for 30 days only if the disability occurs in the first two months of the contract and for 60 days only if the incapacitating disability occurs thereafter.
2. Except for the departures specifically noted herein, the expectations of the Interim Minister and the Congregation are those described in Model Letter of Agreement B, Sec. 2 of *Joint Recommendations Concerning Ministerial Agreements*.
3. In the event either party wishes to terminate this Ministry, a minimum of 60 days notice shall be given.

This Contract represents an official offer by the Congregation to the Consulting Minister when her/his hiring is approved by the Governing Board.

For the Governing Board: _____
(signature)

Name and title: _____ **Date approved:** _____

Interim Minister: _____ **Date Accepted:** _____

Appendix D

**Memorandum of Consulting Minister's Duties
to be attached to the Consulting Ministry Contract***

Note: Those duties the performance of which will best enable the congregation to progress toward the achievement of its key goals should be selected., No minister who is a human being could do all this. A congregation and its Consulting Minister should choose some of the duties listed below and/or create others not listed.

Congregation and Minister agree that Minister will:

- Have primary responsibility for two Sunday services per month including sermon research and writing, preparation of service materials, cooperation with the music committee and Sunday service committee and the involvement of lay members in the services.
- Hold scheduled office hours for congregant calls or visits.
- Provide newsletter copy for Sunday services, adult education, a Minister's column and special notices.
- Attend Board meetings and/or present a Ministerial report at the Board meeting.
- Provide special consultation on growth issues. Meet and coordinate with officers of the congregation regarding planning, programs and opportunities.
- Attend and/or coordinate with the Sunday service committee, the Religious Education committee, Adult Religious Education committee, Music committee, Membership committee, Pastoral Care committee, Finance committee and other committees as needed and available, or as recommended by the President or Board.
- Work with the Religious Education coordinator and choir director to coordinate events and services.
- Conduct Adult Religious Education classes and workshops as available.
- Work with the Membership committee to welcome and orient newcomers and new members. Cooperate in follow-up of visitors and new members.
- Provide pastoral care, including hospital and home visits as needed in coordination with the Pastoral Care committee.
- Be available by telephone throughout the month at reasonable hours for consultation on congregational business or with members seeking support or counsel. Be available by e-mail for the same purposes.
- Attend church dinner or social events as available.
- Attend community social action/ social justice events as available.
- Attend regional, UUA, interfaith or other meetings as available.
- Perform rites of passage for members including child dedications, marriage, memorial services, services of union and similar events consistent with contract limitations.
- Supervise church staff and work with Personnel Committee to ensure good human resource practices.

**from The Consulting and Part-Time Ministry Handbook for Congregations, published by the Pacific Northwest District. Reprinted by permission.*

Appendix E

UUA ACCREDITED INTERIM MINISTRY PROGRAM REQUIREMENTS FOR ADMISSION AND ACCREDITATION

INTRODUCTION

The objective of the Accredited Interim Ministry Program is to maintain a pool of seasoned ministers with advanced consulting skills whose competence in ministering to congregations in all the complexities of an interim period is proven and who are willing to relocate annually.

Accredited Interim Ministers (AIMs) are ministers who specialize in interim ministry. Accreditation is awarded by the UUA Transitions Office on the basis of proven competence in interim ministry, advanced training, and continuing education.

In recognition of their special competencies, the Transitions Director seeks to list AIMs, and to a lesser extent AIMs-in-Training (AIMITs), for interim positions of their choosing by means of an early preference pool.

BECOMING AN ACCREDITED INTERIM MINISTER

Requirements for Admission

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

- generally be in Final Fellowship with the UUA; however, ministers in preliminary fellowship may be admitted on the basis of relevant experience, skills, and training
- demonstrate competence in worship, preaching, counseling, working with volunteers, and church administration
- have completed the Interim Ministry Network's Fundamentals of Transitional Ministry – The work of the Leader or Transitional Ministry Orientation offered each August by the Transitions Office (or both)
- have served effectively as an interim minister for at least one full 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
 - a domestic situation conducive to frequent relocation
- make required professional commitments
 - to retain an AIM as a mentor, and to engage in regular conversation about interim ministry with the mentor at least monthly
 - to provide evaluations of and by congregations served using the Transitions Office appraisal form

- to refrain from serving a congregation as its interim minister for longer than two years
- to refrain from becoming a candidate for the congregation's called ministry until at least three years after completion of service
- to refrain from discussing specific prospective candidates for the called ministry of the congregation with a congregation's ministerial search committee.
- to participate in the early preference pool only if not seeking a called ministry
- to provide to the Transitions Office a copy of each year's executed interim ministry contract

Procedures for Admission

Admission, advancement, accreditation, and continuance in the program are administered by the UUA Transitions Director in consultation with the Interim Ministry Guild Steering Committee elected by the body of AIMs and AIMITs. Applications for admission are welcome after service of one complete year of interim ministry and are due each February 1.

Admission to the program as an AIMIT is granted on the basis of evidence of a minister's effective interim service, satisfaction of the requirements for admission, and commitment to professional growth through continuing education and through the retention of an AIM as a mentor. Contact the Transitions Office for an AIMIT application which provides information about the materials required for submission.

Evaluation of your application will be conducted by the Interim Guild Steering Committee and the Transitions Director. If your application is accepted, you must attend the next April AIM Seminar after which a final determination will be made whether you may be granted AIMIT status.

Requirements for Accreditation

Rigorous standards of accreditation are required by the fact that AIMs are regularly called upon to enter churches in crisis, and to respond, often immediately, to problems that called ministers confront only infrequently.

To earn accreditation as an AIM, an AIMIT must:

- complete two additional years of effective interim ministry (as demonstrated by evaluations completed by the congregation, UUA Regional Staff, and minister, with such other evidence as the Transitions Director may request)
- participate in at least two annual AIM Seminars
- complete the "Fundamentals of Transitional Ministry – The Word of the Leader" program of the Interim Ministry Network (if not completed earlier) or the UUA's Transitional Ministry Orientation
- complete the "Fundamentals of Transitional Ministry – The Word of the Congregation" program of the Interim Ministry Network or its equivalent, including fieldwork

AIMITs who wish to lay claim to AIM status are asked to request an application from the Transitions Office which details the materials required. Applications will be considered by the Transitions Director, the AIMIT's mentor, and another AIM chosen by the mentor.

UUA Tuition Reimbursement Plan

The Transitions Office reimburses AIMITs for the cost of tuition for the Interim Ministry Network's "Fundamentals of Transitional Ministry" and "The Intentional Interim Minister" programs upon receipt of a copy of the Certificate of Completion. Costs for room, board, and travel, if any, are the responsibility of the AIMIT. To arrange payment, send a request to transitions@uua.org.

Maintenance of Accreditation

In order to hone their skills and deepen their professional competencies, AIMs are required to attend the annual AIM Seminar at least every second year, and participate actively in a program of fellowship, continuing education, reflection, and evaluation and self-evaluation. AIM Seminars are eligible for the UUA's continuing education reimbursement program administered by the Director of Professional Development.

Appendix F
**APPLICATION FOR AN INTERIM OR CONSULTING
MINISTRY POSITION**

Information for Transitions Office Use Only

The application for an interim or consulting ministry position is now a part of the UUA's Ministerial Settlement System, available at <http://www2.uua.org/>. To enter the search process this information **must** be completed online- **no paper applications will be accepted**. Below is the information that will be requested.

Name _____ E-mail address _____

Phones: Home _____ Work _____ Cell _____

Your current residence: City _____ State/Prov _____

Date you wish to begin your ministry _____

Compensation:

Minimum Salary plus Housing Allowance required (choose one): A B C D E F

Your present salary (or salary plus housing allowance) _____

Location:

“A” list of three congregations
(AIMs and AIMITs only)

“B” list of three congregations
(AIMs and AIMITs only)

*For the following three questions, refer to UUA Districts and CUC Regions with these initials:
BC (Ballou Channing) CM (Central Midwest) CB (Clara Barton) FL (Florida)
HL (Heartland) JP (Joseph Priestley) MB (Mass Bay) MNY (Metro New York)
MS (Mid-South) MD (Mountain Desert) NNE (Northern New England)
OH (Ohio-Meadville) PC (Pacific Central) PNW (Pacific Northwest)
PSW (Pacific Southwest) PS (Prairie Star) SL (St. Lawrence) SW (Southwest)
TJ (Thomas Jefferson) ECAN (Eastern Canada) WCAN (Western Canada)*

The *only* Districts in which I will serve:

Districts in which I *prefer* to serve:

Appendix G

Interim appraisals should be completed separately by congregation and interim minister with results shared. Appraisals are due after 6 months, after 12 months, and at the end of the second year of interim ministry. In the case of a three-year interim, a final appraisal should be conducted at the end of the ministry. Please send completed form as an email attachment to transitions@uua.org.

All fields are required. Input fields will expand as you type. If you have a problem using this form, please contact transitions@uua.org.

1. Congregation Name (please enter full name)
2. Congregation City and State/Province
3. Name of Interim Minister
4. Date Interim Ministry Began [Click here to enter a date.](#)
5. Name of Person Completing Appraisal
6. Email of Person Completing Appraisal
7. Role of Person Completing Appraisal
8. When was this appraisal conducted?
 after 6 months
 after 12 months
 at end of second year
 at end of third year
9. Date of Appraisal [Click here to enter a date.](#)
10. How did the leadership and congregation prepare itself for interim ministry?
11. Had previous interim ministries affected how interim ministry is viewed? If so, please describe.
12. What goals were initially specified in the interim ministry application? How have they been addressed?
13. Please assess the congregation's work toward engaging and acknowledging its grief and conflicts.

14. Please assess the congregation's work toward recognizing its unique identity and its strengths.
15. Please assess the congregation's work toward recognizing its needs and challenges.
16. Please assess the congregation's work toward understanding the appropriate role of the minister(s), church staff, and lay leaders.
17. Please assess the congregation's work toward successfully navigating leadership shifts that often accompany times of transition.
18. Please assess the congregation's use of appropriate external resources, e.g. the UUA, Regional or District Resources, etc.
19. Please assess the congregation's ongoing work about being engaged in the wider world e.g. service to others, social justice, anti-oppression.
20. Is the interim minister capably ministering as preacher, pastor, and teacher? Have there been difficulties or have constraints been put upon the minister's ability to do so?
21. Has the interim minister been attentive to self-care and to a spiritual practice of choice?
22. Is the interim minister courageously raising the needful issues in the congregation?
23. Is the interim minister gaining the cooperation of the church leadership in addressing those issues?
24. What would you like to see addressed during the remaining interim period or in the future? Are there any adjustments that need to be made to the initial goals or anything else?
25. Any additional thoughts or observations?
26. Has this appraisal been shared with the minister if being completed by the board or with the board if being completed by the minister?
27. If appraisal has not been shared, please explain.

