

# Transforming Preliminary Fellowship

January 2023

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## Introduction

The Settlement Working Group (SWG) of the Ministerial Fellowship Committee (MFC) has been examining and discussing the purpose of and procedures for preliminary fellowship for ministers. At present, the process is viewed by many ministers as an evaluative and punitive one, a sort of “last chance” to make sure that the decision admitting someone to fellowship was correct. This viewpoint was supported by rules that made it easier to remove ministers in preliminary fellowship (changes to which have already been proposed to the UUA Board) and in the very fact that the MFC requires three documents called “evaluations” for every renewal of preliminary fellowship (ministers are required to have three successful renewals of preliminary fellowship before being granted full fellowship). It is also commonly reflected in the notion that full fellowship is akin to “tenure” as a minister. We seek a different system, one based in relationship, development, and a commitment to lifelong learning.

We note as well the high number of waiver requests we see, and are concerned about a system that relies on exceptions to allow people to do good ministry. We have heard from many people in preliminary fellowship feedback that makes it clear that our systems and rules were designed for a very particular subset of parish ministers, and that the farther one is from that model of ministry the less they work for people. Many ministers, especially those whose ministries are innovative, prophetic, and community- and institution-building (and often the very people leading our faith into the future), regularly struggle to meet the requirements of our rules. We seek to make these long overdue changes so that the ministers know we are working with them and building relationships.

Finally, we are concerned that the MFC is regularly put in the position of adjudicating the health of a ministry from evaluation documents that do not agree with each other. We do not believe that this is the proper role for our committee. It too often triangulates us between ministers and those they serve. These things should be worked out by people in direct relationship with the minister and the congregations, communities, and institutions they serve.

Towards these ends, we have developed drafts of new rules and a new procedure. We seek feedback on these drafts. We are working on drafts of new forms currently. The draft changes to the rules are included in two versions—one cleaned up as they would appear if approved, and the other with markup formatting and notes so you can see the changes.

# Guiding Principles for a New Understanding of Preliminary Fellowship

In December of 2022, the MFC affirmed the following guiding principles that the SWG is using to redesign preliminary fellowship:

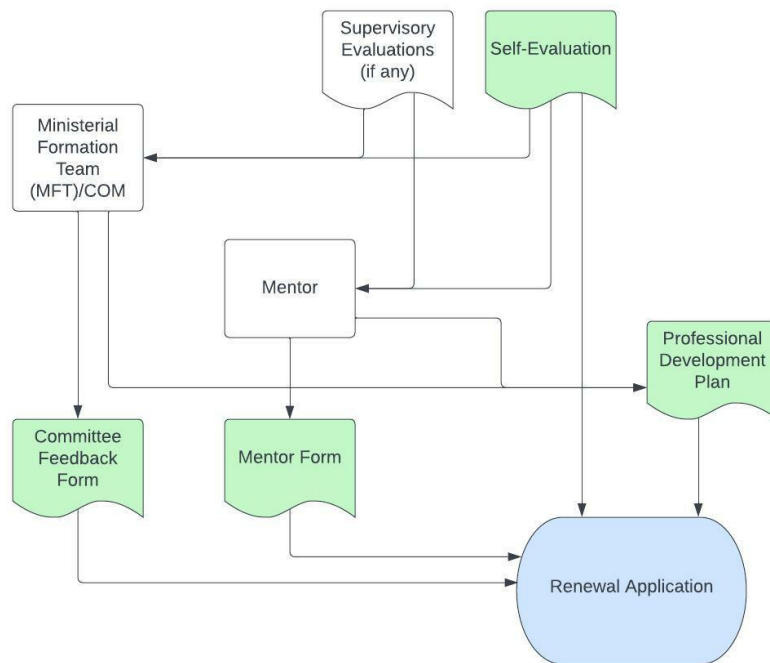
1. We believe that the primary purpose of preliminary fellowship is for the MFC to partner with new ministers to identify, strengthen, and integrate healthy and sustainable practices of self-reflection, seeking constructive feedback and opportunities for accountability, creating plans for their ongoing professional development, and nurturing healthy collegial relationships
2. We seek a broader definition of ministry that allows for movement through preliminary fellowship by ministers serving in a wide variety of settings
  - a. We seek to de-center parish ministry as the default setting for preliminary fellowship, even if congregations and covenanted communities are still the basic unit of membership in the UUA and thus the basis for our polity
  - b. We seek to eliminate class barriers to ministry based in the notion that “real” ministry work is compensated at a certain level
3. We ground our work in an understanding that all of us are learning and growing throughout our lives, careers and callings
4. We seek a process that is more developmental and less evaluative
  - a. We will make the professional development plan the center of a renewal application
  - b. We believe that good mentoring is essential and will endeavor to partner with and empower mentors to do this role well
5. We seek a process that is more relational, encouraging, and supportive
6. We seek a process that enhances ministry rather than distracts the minister from it
  - a. We believe that ministers in preliminary fellowship will grow in resilience and integration with deeper connection and partnership with colleagues, mentors, congregations and/or covenanted communities
7. We seek a process that understands the complex systems and institutions in which ministry is performed and does not give those systems and institutions unaccountable power over a minister’s progress towards full fellowship

## Major Changes Envisioned in Rules

- Rules have been rewritten to envision a broader field of ministry. This includes less emphasis on compensation and hours, and more emphasis on the work of ministry.
- Ministers would have wider latitude in constituting a Ministerial Formation Team (MFT), which could (but doesn’t need to be) a Committee on Ministry. This team would work with ministers in preliminary fellowship to look at any evaluations and feedback they have (we expect that ministers in many settings will still be evaluated by Boards and supervisors) and develop a professional development plan that meets the growing edges identified in those documents.
- Mentors would need to be approved and trained, and would also assist ministers in developing their professional development plans. We are working with the UUMA on a process to support and train mentors.
- Less evaluative material would come to the MFC. The centerpiece of the renewal application thus becomes the professional development plan, heretofore treated almost as an afterthought.

# Draft of New Preliminary Fellowship Procedure

1. Supervisory evaluations, if any exist, and business plans for community/innovative ministries are submitted to a Ministerial Formation Team (MFT). MFT solicits feedback in appropriate ways from ministry setting.
2. Self-evaluation is submitted to mentor and MFT and included in **renewal application**.
3. MFT prepares feedback for minister to guide their professional development plan, and submits that feedback with the **renewal application**.
4. Mentor and MFT work with minister to help them create a professional development plan, which is included in the **renewal application**.
5. Mentor signs statement of affirmation for the **renewal application**.



# **DRAFT** Proposed Rule Changes to Transform Preliminary Fellowship

Settlement Working Group Draft - 1/9/23

Cleaned-Up Version (without formatting on changes and notes)

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## 6. Definition of a Minister

For the purposes of these Rules, the term "Minister" applies to those persons:

- granted fellowship by the MFC;
- whose self and contextual understanding are as a professional religious leader; and
- whose work is theologically grounded, expresses Unitarian Universalist values and principles, and reflects commitments to anti-oppression, collective liberation, and ongoing learning.

## 7. Definition of Professional Ministry

To qualify as active service in ministry, a position must:

- A. Require the use of the competencies and skills associated with ministry, as defined by the MFC.
- B. Have as its central purpose service to persons and/or the transformation of society. In addition, the minister must maintain membership in, employment by, and/or affiliation with a UUA member congregation or covenanted community.

## 13. Preliminary Fellowship

When the Committee determines that the candidate is qualified for Ministerial Fellowship, the Committee shall grant the candidate Preliminary Fellowship status.

### A. Preliminary Fellowship Qualifications

All ministers in Preliminary Fellowship must meet all requirements and general qualifications of professional ministry, as well as any additional requirements established by the MFC, which shall include, but are not limited to:

- I. An ongoing relationship with a mentor, who shall certify annually this relationship, and who has been approved by the UUA Professional Development Director or their designee.
- II. Engagement (covenanted, contracted, called, and/or affiliated) with a UUA or CUC member congregation or covenanting community.
  - A. Ministers serving outside of congregational settings must affiliate with a UUA or CUC member congregation or covenanting community and have that affiliation

on file with the UUA. Affiliation involves a formal connection to a congregation and recognition of the minister as performing a ministry as well as a covenanted relationship with any other minister(s) serving the congregation.

- III. Maintaining contact with the UUA Ministries and Faith Development Staff Group.
- IV. Demonstrating continued ministerial growth and development to the MFC through periodic renewals of preliminary fellowship.

## B. Renewal of Preliminary Fellowship

A person in Preliminary Fellowship shall apply to renew their fellowship regularly following admission to fellowship. To be eligible for renewal, the minister must have engaged in at least 1000 hours of ministerial activity over the course of the renewal period, which shall not be shorter than one year or longer than three years.

## C. Renewal Requirements

Each application for renewal review shall include the following:

- I. A professional development plan developed by the minister in consultation with their mentor and Ministerial Formation Team;
- II. A self-evaluation;
- III. Constructive feedback from a Ministerial Formation Team or other such committee convened for the purpose of ministerial support and developmental review.
- IV. Certification of an existing mentoring relationship.

Following any review, Preliminary Fellowship may be renewed, continued in present status, terminated, or a determination made to move the candidate to Full Fellowship.

The MFC shall make policies governing these requirements.

## D. Renewal Period

A person has up to three years to establish a ministry that is eligible for renewal of fellowship and submit an application for renewal of fellowship. A minister may remain in each renewal period for up to three years before either entering Inactive Fellowship status (as defined in Rule 14) or applying for a waiver from the Committee.

## E. Continuity of Ministry of Preliminary Fellowship

To receive Full Fellowship, a minister must have been granted at least two renewals from the same ministry setting or be engaged in interim ministry as part of the Accredited Interim Ministry training program.

## F. Waivers

The MFC may waive any requirement in this rule at its discretion. The MFC shall make policies governing waiver requests.

## 14. Inactive Fellowship Status

Any minister holding Preliminary Fellowship, who in the judgment of the Committee ceases to work as a minister, or who fails to apply for a renewal of their preliminary fellowship in a three-year period shall be moved to Inactive Fellowship status. The decision of the Committee to move a minister to Inactive Fellowship status shall not be subject to appeal. A minister may apply to the Committee to be removed from Inactive Fellowship status. The Committee shall make policies governing Inactive Fellowship status.

## 15. Representation as a Minister

Only a candidate who has received Preliminary Fellowship is entitled to represent themselves as a fellowshipped UU minister.

## 17. Granting of Full Fellowship

To be granted Full Fellowship, a minister must have been in Preliminary Fellowship for at least three years, received three satisfactory renewals, and be deemed by the Committee to be an appropriate candidate for Full Fellowship.

## 18. Employment Restrictions for Ministers Serving Congregations

In order to ensure an equitable settlement process for congregations and ministers in transition, policies, procedures and restrictions have been developed by the Ministries and Faith Development Staff Group and are administered by the Transitions Director. Failure to adhere to the policies, procedures and restrictions governing the settlement process, including, but not limited to, the restrictions described below may constitute grounds for termination of Ministerial Fellowship.

### A. Access to UUA Ministry Search System

Access to the UUA's ministry search system is limited to ministers in Fellowship with the UUA or those who have been otherwise approved by the MFC to seek settlement.

### B. Three-Year Rule

A minister is not eligible for employment in a ministerial capacity in a congregation for three years following previous engagement in a professional capacity in that congregation. This includes but is not limited to interns, field-education students, interims, contract ministers, Ministerial Settlement Representatives, religious educators, etc. Waivers may be granted by application to the MFC.

### C. Inside Candidate and Professional Engagement Rule

Any minister who has visited a congregation in any professional capacity after the most recent settled minister has announced their departure to the congregation, or who is either employed by or a member of a congregation seeking to fill another ministerial position on staff may only apply for such a position as an inside candidate, to be considered before the Transitions Director has submitted a list of potential candidates to that congregation.

# Version with Changes Noted for Board Approval

## 6. Definition of a Minister

For the purposes of these Rules, the term "Minister" applies to those persons:

- **granted fellowship by the MFC;**
- **whose self and contextual understanding are as a professional religious leader;**  
**and**
- **whose work is theologically grounded, expresses Unitarian Universalist values and principles, and reflects commitments to anti-oppression, collective liberation, and ongoing learning.**

~~whose work is theologically grounded, whose work expresses Unitarian Universalist values and principles, whose self and contextual understanding are as a professional religious leader, and who has been granted fellowship by the MFC.~~

~~Types of ministry in which fellowshipped ministers engage include:~~

### ~~**A. Community Ministers**~~

~~Ministers qualified for and applying their skill and experience to the community setting in such capacities as counseling, chaplaincy, social justice, education in religious studies, and other ministries as the Ministerial Fellowship Committee may recognize, shall be categorized and referred to as "Community Ministers".~~

### ~~**B. Ministers of Religious Education**~~

~~Ministers qualified for and applying their skill and experience to educational settings related to religious growth and development in one or more congregation(s) that is or are members of the Unitarian Universalist Association shall be categorized and referred to as "Ministers of Religious Education."~~

### ~~**C. Parish Ministers**~~

~~Ministers qualified for and applying their skill and experience in one or more congregation that is or are members of the Unitarian Universalist Association shall be categorized and referred to as "Parish Ministers."~~



## 7. Definition of Professional Ministry

To qualify as active service in ministry, a position must:

- A. Require the use of **the competencies and skills associated with ministry, as defined by the MFC.** ~~traditional ministerial skills, such as pastoral counseling, worship and preaching, religious education, social witness and advocacy, and institutional leadership.~~
- B. Have as its central purpose service to persons **and/or** the transformation of society. In addition, the minister must ~~be a member of, and maintain active involvement in,~~ **maintain membership in, employment by, and/or affiliation with** a UUA member **congregation or covenanted community society.**

~~A minister who does not serve in a UU related institution shall be required to demonstrate continued interest in retaining that status by giving evidence of active involvement in denominational district, local society, and collegial activities.~~

## 13. Preliminary Fellowship

When the Committee determines that the candidate is qualified **for** ~~to pursue~~ Ministerial Fellowship, the Committee shall grant the candidate Preliminary Fellowship status.

### A. Preliminary Fellowship Qualifications

**[Internal Note: based on what was formerly rules 13D and 15B]**

All ministers in Preliminary Fellowship must meet all requirements and general qualifications of professional ministry, as well as any additional requirements established by the MFC, which shall include, but are not limited to:

- V. **An ongoing relationship with a mentor, who shall certify annually this relationship, and who has been approved by the UUA Professional Development Director or their designee.**
- VI. **Engagement (covenanted, contracted, called, and/or affiliated) with a UUA or CUC member congregation or covenanting community.**
  - A. **Ministers serving outside of congregational settings must affiliate with a UUA or CUC member congregation or covenanting community and have that affiliation on file with the UUA. Affiliation involves a formal connection to a congregation and recognition of the minister as performing a ministry as well as a covenanted relationship with any other minister(s) serving the congregation.**
- VII. **Maintaining contact with the UUA Ministries and Faith Development Staff Group.**
- VIII. **Demonstrating continued ministerial growth and development to the MFC through periodic renewals of preliminary fellowship.**

## **BA. Renewal of Preliminary Fellowship**

A person in Preliminary Fellowship shall **apply to renew their fellowship regularly following admission to fellowship.** ~~be reviewed approximately every year from the date of hire or call.~~ To be eligible for **renewal review**, the minister must **have engaged in at least 1000 hours of ministerial activity over the course of the renewal period, which shall not be shorter than one year or longer than three years.** ~~be engaged in compensated ministerial activities which constitute fifty percent or more of a typical work schedule for a renewal period of 10 to 12 consecutive months. The Committee will also consider, for review, compensated ministerial activity which constitutes at least twenty-five percent of the typical work schedule (430 hours per year) if the renewal period is at least 24 consecutive months in duration.~~

~~This requirement may, at the Committee's discretion, be waived when it determines that the ministerial service is substantial enough to warrant eligibility for review.~~

## **CB. Renewal Requirements**

Each **application for renewal review shall** ~~must~~ include the following:

- V. A professional development plan developed by the minister in consultation with their mentor and Ministerial Formation Team;**
- VI. A self-evaluation;**
- VII. Constructive feedback from a Ministerial Formation Team or other such committee convened for the purpose of ministerial support and developmental review.**
- VIII. Certification of an existing mentoring relationship.**
  - ~~i. A self-evaluation~~
  - ~~ii. An evaluation completed by one's supervisor or supervising committee (i.e. Board of Trustees, supervising minister, supervisor, etc. In ministries where one does not have a supervisor, a supervisory committee or relationship must be established for the purpose of evaluation.)~~

~~Community ministers serving institutions in which they are regularly and formally evaluated have the option to submit their institution's evaluation forms or a supervisor's letter of evaluation in lieu of the MFC's Board of Trustees/Supervisor's evaluation form. The self-evaluation and an evaluation from the Ministerial Formation Team is also required. The MFC requires UU representation through either the supervisor or someone on the Ministerial Formation Team.~~
  - ~~iii. An evaluation from one's Committee on Ministry. For community-based ministers, an appointed Ministerial Formation Team may be appointed to serve this function. The Ministerial Formation Team should include members of a congregation and appropriate representation from the institution or agency being served by the minister. If the minister~~

~~is not employed by an institution or agency, then composition of the Committee on Ministry must be approved by the Professional Development Director of the UUA.~~

- ~~iv. A professional development plan~~
- ~~v. A form completed by the minister's mentor confirming that the minister is in a mentoring relationship.~~
- ~~vi. A copy of the agreement or covenant with one's affiliating congregation. (Community ministers only.)~~

Following any review, Preliminary Fellowship may be renewed, continued in present status, terminated, or a determination made to move the candidate to Full Fellowship.

**The MFC shall make policies governing these requirements.**

## **DG. Renewal Period**

A person has up to three years to establish a ministry that is eligible for renewal of fellowship and submit an application for renewal of fellowship. ~~Once a person begins working in ministry that is eligible for renewal of fellowship, one must submit an application for renewal of fellowship annually. If a person stops working in ministry, the~~ A minister may remain in **each** ~~that~~ renewal period for up to three years before either entering Inactive **Fellowship** status (**as defined in Rule 14**) or applying for a waiver from the Committee. ~~If a waiver is granted to extend the renewal period, the extension will be for one year.~~

## **D. Community Minister Renewals**

~~All ministers serving community settings must during Preliminary Fellowship receive affiliation with a UUA or GUC member congregation. Affiliation involves a formal connection to a congregation and recognition of the community minister as performing a ministry. Affiliation should include a vote of the Board and having a covenanted relationship with the congregation's minister(s), if there is one.~~

## **E. Continuity of Ministry of Preliminary Fellowship**

To receive Full Fellowship, a minister must have been granted at least two renewals from the same **ministry setting or be engaged in interim ministry as part of the Accredited Interim Ministry training program.** ~~congregation or organization. Where, however, the minister has been accepted into the Accredited Interim Ministry training program and is making expected progress toward completion, each year of interim ministry may be counted.~~

## **F. Waivers**

**The MFC may waive any requirement in this rule at its discretion. The MFC shall make policies governing waiver requests.**

## 14. Inactive Fellowship Status

Any minister holding Preliminary Fellowship, who in the judgment of the Committee ceases to work as a minister; **or who fails to apply for a renewal of their preliminary fellowship in a three-year period** shall be moved to Inactive Fellowship status. The decision of the Committee to move a minister to Inactive Fellowship status shall not be subject to appeal. A minister may apply to the Committee to be removed from Inactive Fellowship status. **The Committee shall make policies governing Inactive Fellowship status.**

~~Ministers in Inactive Fellowship Status and their families will not ordinarily be eligible for financial aid administered through the UUA until the needs of ministers in Fellowship have been met.~~

## 15. ~~Entry into Professional Ministry~~ **Representation as a Minister**

### ~~A. Settlement~~

Only a candidate who has received Preliminary Fellowship is entitled to represent themselves as a fellowshipped UU minister. ~~and to access the UUA's settlement system.~~

**[Internal note: Access to settlement system rule moved to 18; Preliminary Fellowship Qualifications moved to 13]**

### ~~B. Preliminary Fellowship Qualifications~~

~~All ministers in Preliminary Fellowship must meet all requirements and general qualifications of professional ministry, as well as any additional requirements established by the MFC, which shall include, but are not limited to:~~

- ~~i. Being in a mentored relationship with a UU minister in Full Fellowship who is serving or has served in the same type of ministry;~~
- ~~ii. Being actively involved in a UU congregation;~~
- ~~iii. Undergoing annual review;~~
- ~~iv. Maintaining contact with the UUA Ministries and Faith Development Staff Group; and~~
- ~~v. Demonstrating continued growth and satisfactory progress toward Full Fellowship.~~

## 17. Granting of Full Fellowship

To be granted Full Fellowship, a minister must have been in Preliminary Fellowship for at least three years, received three satisfactory renewals, and be deemed by the Committee to be an appropriate candidate for Full Fellowship.

## 18. ~~Settlement~~ **Employment** Restrictions for Ministers Serving Congregations

In order to ensure an equitable settlement process for congregations and ministers in transition, policies, procedures and restrictions have been developed by the Ministries and Faith Development Staff Group and are administered by the Transitions Director. Failure to adhere to the policies, procedures and restrictions governing the settlement process, including, but not limited to, the restrictions described below may constitute grounds for termination of Ministerial Fellowship.

### **A. Access to UUA Ministry Search System** [Internal Note: previously part of Rule 15]

**Access to the UUA's ministry search system is limited to ministers in Fellowship with the UUA or those who have been otherwise approved by the MFC to seek settlement.**

### **B. A. Three-Year Rule**

A minister is not eligible for ~~settlement~~ **employment in a ministerial capacity** in a congregation for ~~at least~~ three years following previous engagement in a professional capacity in that congregation. This includes but is not limited to interns, field-education students, interims, contract ministers, Ministerial Settlement Representatives, religious educators, etc. Waivers may be granted by application to the MFC.

### **B. Professional Engagement Rule**

~~For any given professional vacancy, a minister who has visited a congregation in any professional capacity after the most recently settled minister has announced their resignation to the congregation shall not be recommended to that congregation by Ministries and Faith Development for twelve months following the visit.~~

### **C. Inside Candidate and Professional Engagement Rule**

Any minister who **has visited a congregation in any professional capacity after the most recent settled minister has announced their departure to the congregation, or who is** either employed by or a member of a congregation seeking to fill another ministerial position on staff may **only apply for such a position as an inside candidate, to be considered before** ~~not accept a call for that position once the~~ Transitions Director has submitted a list of potential candidates to that congregation.