



Settlement Handbook

*Revised 12/2024
(with minor edits which will not affect the 2025 search process)*

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When viewed online or downloaded as a PDF, this is a searchable document with links in the table of contents and throughout.

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About the Handbook (2024-2025 Edition)

More than a decade of learning has gone into producing this holistic handbook—one that is not based on the experience of one year of search. The latest edition has a few updates from last year's edition. Every year, we study and slightly improve the search process. We refine our resources to reflect what we have learned and changed to maximize clarity, fairness, and the chance for good ministry matches to align.

The information here comes from the collective wisdom of all the people who worked in connection with ministerial transitions during those years—the UUA Transitions Team, other UUA staff, the volunteers who support search processes, compensation consultants, and, most importantly, ministers and congregations in search for settled ministry.

The handbook serves three primary purposes:

1. To provide clarity and a navigation aid for those involved in search about the various pieces and processes that make up the whole.
2. To ensure fairness for all those in the search process by providing rules, best practices, acceptable deviations, and background information on why this process is the way that it is. Hint: if it's not mentioned here in the Settlement Handbook somewhere, it's probably not an acceptable deviation.
3. To remind everyone that this is a team effort. The UUA Transitions Team is committed to a holistic and anti-oppressive approach in search. We are here to support congregations and ministers through the search process. While we can't guarantee a successful search, we are committed to doing our part in the process to maximize the chances of good matches alongside the ministers and congregations in search. We ask that congregations and ministers take responsibility for their part in the process, remembering they are one of many congregations or ministers searching at the same time. Being a part of a shared faith, we ask that everyone be committed to serving Unitarian Universalism in this search process as well.

The manual is for searching congregations, ministers in search, UUA staff, volunteers who support the work of search, and anyone else wanting to learn more about the settled search process. Information on interim, developmental, and contract ministry searches is found in the [Transitional Ministry Handbook](#).

The Settlement Handbook is/will be offered in two formats:

- This PDF file of the entire document, which should be read at least once from start to finish by all searching ministers, church leaders, and search team members.
- A searchable page with links to all sections will be coming soon for easier to find information.

If you find errors in this document, please email transitions@uua.org. For questions and clarifications, email the Congregational Transitions Director at cpurcell@uua.org or the whole UUA Transitions Team staff at transitions@uua.org. Minor handbook changes may be made for

clarity on a rolling basis. Any major change affecting the process during the search cycle will be sent out via our email list to ministers, search teams, support volunteers, and staff.

Search Overview

Background Information to Improve the Odds of Better Decision Making

After years of guiding congregations and ministers through the search process, the UUA Transitions Team has seen this play out repeatedly:

Anxiety hampers good decision-making.

Anxiety...congregations have it. Ministers have it. Often, they are good at sharing it. Curiously, anxiety is comparable to snowflakes; no two anxieties are ever identical. Sure, congregations have anxiety about whether they will find a minister, and ministers have anxiety about whether they will find a congregation, but, almost always, the anxiety is deeper and more multi-layered than that.

Congregations create narratives from their histories of search and ministry that guide their next search processes. Ministers do the same. “We need a minister who is good at administration.” Somewhere, often unspoken, is the belief the previous minister was not good at administration. Also missing here is the unspoken expectation that the next minister will not only be good at administration but be just as good at all the things the previous minister was and will just simply add good administration without giving up some other piece of ministry. A minister might think, “I want a congregation that wants the minister to lead.” What’s missing here is an understanding of how much trust-building needs to occur for the minister to be seen by the congregation as their minister, and that this takes time, cooperation, and shared experiences.

If there is help for managing anxiety, it’s self-awareness. Recognizing the anxiety, knowing why you have it and how it manifests itself in how you are feeling and what you are likely to do---all of this makes you less reactive, less closed, and less tied to the past, and more likely to be proactive, open to possibility, and ready to create a new future.

Anxiety can show itself in many ways. Desperation, determination, overly controlling behavior, indecisiveness, asking others to solve issues (often so someone else is held responsible for it later), procrastination, rushing, wallowing, hyper-focusing on one detail, going down rabbit holes, conflict, overanalyzing, excessive worrying, distraction, and perfectionism—all are different ways anxiety has played out for ministers and congregations in the search process.

Self-awareness improves the odds that anxiety won’t govern your process. With self-awareness comes the ability to make choices about what to do with the anxiety or to ask for help. Both are better options than letting anxiety rule your search process.

You may hear someone in a congregation say, “We just need to get a minister,” yet ministers are not the same. While many ministers could serve many different congregations well, ministers are looking for congregations that value the ministers’ specific gifts, know their own specific needs, and are willing to work with ministers towards common visions and goals. Congregations also have their own specific gifts and challenges, and no minister should assume all congregations are alike or that the minister’s own gifts and challenges will be what every

congregation needs at a particular moment. Indeed, one of the most common statements departing ministers make is, “The congregation needs someone different who....”

There are basic skills needed, of course. All ministers should know how to preach and do pastoral care, though how good preaching and pastoral care are defined will vary by congregation. Ministers hope that a congregation will be a place of community, growth, justice, and possibility, though this varies from congregation to congregation as well.

The more generic and unclear the anxiety is, the less likely the congregation or minister are to find what they need. This is where resources from outside can be useful. For congregations, the interim minister, the Congregational Transitions Director, UUA regional staff, and/or the volunteers who support searches can be potential mirrors, questioners, and connectors of dots. For ministers, colleagues, especially mentors, regional staff who know you, and the UUA Transitions Team are your most likely grounding presences and reality checks.

Searching congregations and ministers improve the odds of success by getting support from multiple places. Curiously, this is true for congregations and ministers outside of search as well.

The Settlement Handbook exists to provide as much clarity as possible about the ministerial search for both congregations and ministers so that everyone can make the best decision possible. We (the UUA—the Transitions Team, UUA Regional Staff, search team retreat leaders, compensation consultants, "Break Barriers, Build Beliefs" trainers) can do something about the particulars, the nuts and bolts, the order of events.

While we hope the manual provides enough good information to allow for clear process, we also know that UUA staff and resources are only part of the equation. Congregations and ministers are the other pieces that make up the ministerial search process.

Each piece has its part.

The UUA supplies the structure, the road map, the cautions and learnings from earlier searches.

Ministers must bring themselves as ministers, willing to authentically share their vision for ministry, gifts, and humanity with a congregation. They must also know their limits and where they need further professional development. Ultimately, they must be willing to take the time to build trust with a congregation. They must also know how their anxieties can prevent these things from happening.

Congregations must bring authenticity to the search process. No good minister expects a perfect congregation. This is not why people were called to ministry. They were called to ministry to journey with a congregation and its people, navigating the way between who they are and who they want to be. The congregation which presents its challenges, even clarifying which ones they do and do not want to work on with a minister, is better served than the congregation which presents only a good picture of itself. Also, congregations able to present the imperfect in themselves are more likely to appreciate ministers who bring their own imperfect selves to ministry.

To use a metaphor, any realtor will tell you that buyers have their list of “must haves.” Given what they can afford, most people looking for a home overestimate what they can get. They end up having to make the best of what they can put into a new place to live. This metaphor is true of ministerial search for both congregations and ministers. If you want the “perfect” home, be

prepared to spend a lot of money up-front, and be willing to spend more time on upkeep and maintenance. Setting reasonable expectations for yourselves will help.

To extend the metaphor, no two housing markets are ever alike. What's available one year might not be available the next. For both ministers and congregations, **no two search cycles are alike**. Whatever experience you had in your last search, the odds that this search will be identical to the last one are extremely low.

Different ministers are in search every year. The number of ministers in the search process is another key factor. The same is true for congregations. Not only are there different congregations and a different number of congregations in search, but the sizes of the congregations, what they can pay ministers, and geography all come into play. In some cases, ministers are not only looking for where they can do ministry, but also where their spouses can find work.

With these variables comes the reality that there is no guarantee. Congregations and ministers may do everything well and still not find what they want in a particular search cycle. The pressure can be great to lower standards, yet failure in search occurs not from coming up empty, but from deciding to select something you know ultimately won't work out. It is better to search well than quickly.

To support congregations and ministers through this process, the Settlement Handbook will provide you with the structure to improve the odds for a good search and settlement.

To that end, this Settlement Handbook is divided into nine sections—this overview, the seven phases of the settled search process, and a final section on what happens if no match occurs.

Each section will provide you with information about the search process and the recommended best practices for each stage of the search. Additionally, we'll try and give you a little context and background, not so much to bore you (though it might!), but to give you some insight as to why things are the way they are.

Each section is divided into its own pieces—an overview with background information and philosophy, the key elements of each phase, a calendar, frequently asked questions, links to forms needed in each phase, information about the role of the MinistrySearch system in that particular phase of search, any other piece of needed information or food for thought, and case studies taken from real situations to encourage people to ponder, discuss, and learn.

While the sections/phases are linear in their presentation, they also can and sometimes do overlap. This is especially true for ministers who are in search and are also looking at a potential next ministry. Everything cannot be done separately and perfectly, though it should not be glossed over, bypassed, or assumed to be unnecessary. This becomes complicated on a set timeline, which settled search has, yet most congregations and ministers manage to make this work with the help of the process and UUA staff.

All sections are necessary but not all are equal, especially in terms of time and work commitment. Each covers a distinct phase of the overall search.

- Phase 1: Concluding a Ministry Well comes out of the very real and lived experience that all previous ministries affect the next ministry. Congregants and ministers often blur ministries into a single narrative and base their next ministry on this narrative, often

expecting it to be the same or, conversely, assuming it will have no effect on their next ministry. Neither assumption is true.

- Phase 2: Education and Preparation for Search focuses on intentionality, being mindful of the process of moving the entire congregation toward search with deliberation and care, knowing who can and should assist you in the process, and knowing how to select a search team wisely, fund the search, and connect with a search team retreat leader. For ministers, this involves research, information gathering, and thoughts on timing, whether you are finishing your ministerial preparation or serving in a ministry.
- Phase 3: Building the Structure to Search includes congregations' search team roles, process, and organization. The work of the search team is to gather information, materials, and insights on the congregation to present an authentic picture for ministers. For ministers, this involves preparation of their materials, website, and references for the search.
- Phase 4: Opening the Search is about the search team presenting itself publicly to ministers, ministers expressing interest in congregations, what each should do once that happens, and what a congregation should know as this goes on.
- Phase 5: Discernment/Mutual Selection is about the process of moving from many options to a final option for both ministers and congregations. This process moves from the initial release of ministers' names to congregations to interviews to pre-candidating weekends to the final discernment process.
- Phase 6: Finalizing the Offer is about what happens when you have a mutual yes and are moving toward a candidating week. This includes contract negotiations, background checks, and announcing the candidate.
- Phase 7: Entering a New Ministry is about what happens during candidating week and beyond.
- If No Match Occurs: this section is for congregations and ministers who are interested in continuing in search but did not find or become a candidate by the offer date. This is a continuation of the settled search process, albeit on a tighter timeline.

By sorting this information into different phases, our hope is that you will understand that ministerial search is multi-faceted and manageable, and that clarity about process will help you to make good decisions. Ultimately, they are your decisions to make—just remember that you don't have to go it alone.

Key Elements

Percentage of Time

- Any ministry search that is not for a full-time position (100%) is considered a contract ministry search. Please be in touch with the Congregational Transitions Director if your congregation needs to pivot from a full-time to a part-time ministry search.

- Congregations must be clear about the percentage of time they are requesting from a minister before posting any position. A search for a settled minister must be 100% full-time.

Language of Hire and Call

- Settled ministers are called by a congregation. Most ministers want at least a 90-95% affirmative vote to accept a call. A called minister's contract should be reviewed yearly by the Governing Board, though the minister and congregation understand the ministry's end date is not set.
- Contract, developmental, and interim ministers are hired by the governing board for a specific period. Contract ministries are usually for a year with an option to renew. Developmental and interim ministry contracts are set for a specific number of years, though they may be extended for a year with approval from the UUA Transitions Team and regional staff.

Manners

- Often, the greatest kindness in search is timeliness. Acknowledging interest, the receipt of materials, keeping people informed of timelines, being on time for video interviews, being gracious in the face of last-minute changes—all of these and more matter in the search. Timeliness, however, does not equal immediacy.
- Avoid acronyms in written communications with others in search communications. Most people outside of a congregation do not know other congregations by acronyms. Please list city and state/province in communications.
- Understanding good manners is not the same across cultures, regions, and identities. Do not assume your understanding of manners matches everyone else's understanding of manners. For example, how people are greeted and welcomed varies widely by culture, region, and identity. Does being polite mean being kind, efficient, direct, passive, understated, gregarious, or something else?
- The MinistrySearch system provides a simple and efficient way to express gratitude for interest and to notify a minister or congregation that you are not continuing with your search with them currently. It also allows you to create your own message. Please use the dismiss button in the system for this purpose.
- Remember that this is not a corporate or academic hiring process. This is a ministry search. It is designed to help ministers and congregations find each other in a hurting and chaotic world so that our congregations may be places of hope, care, and transformation. Treat each other well with this awareness in mind.
- The UUA Transitions Team is available and willing to listen if you need to vent about frustrations or share stories of hurtful interactions.

Covenant Requirement

- All searching congregations, searching ministers, and those who assist congregations and ministers in the search process are asked to covenant with one another for a fair and responsible search process. This requirement centers a key component of our Unitarian Universalist faith, the sacred promises we make to one another, in the vital work of ministry search.
- Congregations and ministers who have not agreed to covenant will not have their materials shared with others in the transition process.
- Those congregations and ministers who do not keep the covenant will face restrictions and may be held from the search process. Volunteers who support the search process and staff out of covenant will be referred to those who supervise them.
- You agree to enter into the search covenant by having access to your congregational or ministerial record on MinistrySearch; there is no separate form to fill out or submit.
- Volunteers and UUA Staff, by their paid work, are assumed to have agreed to follow the covenant. The UUA Transitions Team fully abides by the covenant below.

Covenant for Searching Congregations

As a search team representing our congregation, we covenant to:

- A. Serve our congregation to the best of our ability, realizing, both as a group and individually, we represent the face of our congregation and community in the ministerial search process. We will represent our congregation with forthright honesty, care, compassion, and respect.
- B. Follow the rules and timelines within the Settlement Handbook and the UUA transitions website.
- C. Honor a minister's needs to follow the UU Ministers Association guidelines (regardless of membership).
- D. Inform and work with the UUA Transitions Team and regional staff throughout the transitional process.
- E. Fund the cost of ministers' and their partners' travel to our congregation for all pre-candidating weekends and candidating week if those events will take place in person.
- F. Understand the need for fairness and confidentiality throughout the search process.

Covenant for Searching Ministers

As a Unitarian Universalist minister representing our faith, I covenant to:

- A. Serve our Association of congregations to the best of my ability. I pledge to interact with each congregation I encounter in the search process with respect, kindness, and authenticity.
- B. Follow the rules and timelines within the Settlement Handbook and the UUA transitions website.
- C. Follow UU Ministers Association guidelines (regardless of membership).
- D. Inform and work with the UUA Transitions Team and regional staff throughout the search process.
- E. Understand the need for fairness and confidentiality throughout the search process.

Covenant for UUA Staff and Volunteers Who Support Transitions

As the UUA Transitions Team, regional staff, and search volunteers representing our faith, we covenant to:

- A. Serve our Association of congregations to the best of our abilities. We pledge to interact with each congregation we encounter in the search process with respect, kindness, and authenticity.
- B. Serve the ministers in search by following the rules and honor the timeline of the search process.
- C. Serve our Unitarian Universalist faith in a way that supports its values and manage the ministerial search process in a way that respects all involved.

Congregational Polity

- While congregational polity means self-determination for congregations, with it comes a responsibility to others and to all the values of Unitarian Universalism. The search process is designed so that both polity and responsibility can be mutually honored.
- We encourage every congregation to use the MinistrySearch system as a matter of safety since the system is only open to UU ministers who have gone through the appropriate preparation and process and remain in fellowship.

UUMA Guidelines

- All ministers in search are required to follow the professional guidelines of the UU Ministers Association.

Second Ministry Searches

- There is a manual for second ministry searches.
- Second ministry searches for full-time positions can follow the settled ministry search cycle, though they are viewed by the UUA Transitions Team as contract ministries.
- Senior ministers are encouraged to discuss their options with the Transitions Director early in their process.
- The coach for all second ministry positions is the Transitions Director.

Congregational Staff

- Staff members serving UU congregations in search may not serve on the ministerial search team, except in rare cases when a minister or executive director on staff is in a co-equal role to the minister who will be identified in the search process.
- Staff members should not be interviewed by ministers in search—the one exception being other ministers serving on staff, as they are in covenant with each other by UUMA Guidelines.
- Should a staff member learn that an applicant is considering the congregation where the staff member serves, the staff member should keep confidentiality about the applicant, avoid expressing their opinions about the applicant, and avoid being a reference about the congregation.
- The search team may meet with staff for information and reflection about the search process.
- During candidating week, the ministerial candidate and staff should have at least one meeting.
- Transitions Support for Congregational Staff provides more information and resources.

Anti-Oppression Commitment

- The UUA Transitions Team is committed to serving all ministers and congregations with an understanding of how oppression, supremacy, and bias work in the world, and is continually examining how these are at play in the search system.
- All congregations are expected to take part in the "Breaking Barriers, Building Beliefs" program as part of the search process.
- All congregations and searching ministers are best served by authentically sharing what they have learned and by not over-promising.
- For people from historically marginalized groups involved in the search process, you may experience micro-aggressions, bias, and supremacist thinking at times. This does

not mean you cannot do good ministry or good work as part of the search team. Reach out to the UUA Transitions Team if you would like some support.

- It is not the responsibility of people from historically marginalized groups to educate the people who say or do something that is biased or oppressive. Ministers experiencing micro-aggressions, bias, and oppression are encouraged to inform the Transitions Director. Search team members experiencing bias in the process, if other members of the search team are unable to acknowledge and handle the bias, should talk to their interim minister, the Congregational Transitions Director, or another member of the UUA Transitions Team.
- Search team members needing help understanding issues of supremacy and fragility who are not from marginalized groups should contact the Congregational Transitions Director.
- Assuming a minister with a particular identity will bring more people into the congregation with that identity is a trap for both the congregation and the minister; it is an individual solution to a systemic problem.
- The Settlement Handbook uses plural pronouns (they/them/their) throughout as one way to avoid bias.

How Search Has Changed

At one time, the search for a minister involved expensive long-distance phone calls, notebooks, the postal system, and tremendous denominational influence. Congregations and ministers had to type their materials via typewriter, put packets together in notebooks, and mail them through the postal system. Ministers had to ask the UUA to have their names sent to places and the UUA would then decide where to send the names, which sometimes did not match the ministers' requests. Three-ring notebooks of the applying ministers' packets were passed secretly amongst search team members. Congregations told stories that they never got good names from the UUA. Most of the ministers identified as straight, white, able-bodied, cis-gender (though that word probably did not exist then) males who were the primary source of income for their family.

Slowly, things changed. Email came into being. The internet changed the way we get information. Mobile phones became available. Paper became less needed. Ministry became less male, white, straight, cisgender, and, along the way, stopped being the primary source of income for many ministers. In 2000, a new computerized settlement system allowed for a change to how ministers and congregations found each other with the UUA moving out of the middle. A free-market system was introduced. Ministers could express their interest in any congregation. Search teams no longer had to ask for new names to be sent to them. It was hoped that this would end the story of the "UUA never sent us anyone good," and put emphasis on how a congregation presented itself through its stories and its compensation level. Congregations and ministers spent time, effort, and money to create websites just for their search processes. Search teams moved from no group calls to conference calls to video conferencing for initial interviews. Technology saved time through easier access and distribution with less reliance on paper. With equal access to information and a free market system, a

schedule with deadlines became needed to promote a fair search for all. Search teams and ministers created record sheets in a search system. The UUA could provide a search team or minister with a forgotten username and password. The UUA had to verify ministers' standing and work history. Search teams had to enter historical data that they had submitted to the UUA in other forms. Ministers had to deal with the possibility of multiple offers on the same day.

Now, we have a modern MinistrySearch system. Information given to the UUA (during annual congregational certification, for example) is now automatically included in a searching congregation's search profile. Ministers' records will have their basic work history and fellowship information automatically entered into their search record. The new system can now support all types of ministry searches (settled, interim, contract, developmental, and second ministry positions). Congregations should and ministers may have a website, but not specific for search. Much of the information needed in a search website will now be shared through MinistrySearch records and a PDF file or a link to an online folder of documents. Our ministry is more diverse than ever, though issues of bias and supremacy still prominently exist (overtly and covertly) and require constant attention. And there is this new search handbook to guide the process, which is updated for each cycle. The free market system still exists, and it is increasingly important for congregations and ministers to be authentic about their strengths and challenges. Compensation, geography, a realistic portrayal of needs/context, and a willingness to build trust and civility are the leading qualities desired by ministers searching in a free market system. Congregations are looking for a minister who can share leadership with them in a quickly changing time, all too often while trying to recreate the past.

The COVID-19 pandemic has greatly impacted the search process. The UUA Transitions Team has made updates throughout this handbook to incorporate virtual options for various points throughout the search process.

How Search Hasn't Changed

Six Things to Know

1. Compensation (with benefits) still matters more than any other factor in a search.
2. Good preaching will almost always be what a congregation says it wants most in a minister (though how good preaching is defined varies from congregation to congregation—and few congregations tell ministers ahead of time what they believe good preaching to be).
3. Congregations expect ministers to be naturally pastoral. That has become truer as ministry has become more diverse.
4. Congregations and ministers believe their current search will be exactly like their last search (especially if it didn't go well). No two search years or experiences are alike, however.
5. Search teams often carry the anxiety for the entire congregation in the search process. This is a lot to take on. And often, one or two people on the search team hold the anxiety for the team and the congregation. That is even more pressure. And it often shows itself in ways that wouldn't normally be defined as "worrying." This anxiety can also lead to the assumption that ministers are not anxious in the search process.

6. Words like “history of misconduct” and “after-pastor” are often a part of a congregation’s story. Some congregations may be completely or partially unaware of the history of ministerial misconduct in their own congregation. In theory, the most foundational act of ministry is to do no harm and to build mutual trust. Yet most congregations and ministers rarely realize or acknowledge how critical this act is to successful ministry and fail to articulate their responsibility to continually make successful ministry possible. Good ministry, trust-building, boundary-setting, and covenantal behavior are all possible and especially vital after misconduct.

International Search

Any search team from a congregation located in the United States that considers hiring or calling a minister who is not a U.S. citizen should make sure their congregation has its own 501c3 status. Please contact the UUA Transitions Team for more information.

For ministers who are U.S. citizens and are considering moving to and serving in a Canadian congregation, a document with considerations for religious professionals moving to Canada exists. Please ask the UUA Transitions Team for more information.

E-Mail List

- The UUA Transitions Team maintains email lists for each cycle of interim and settled search.
- Ministers may opt into email updates about the search process by logging into MinistrySearch and clicking the red “Stay Informed!” button on the right side of their dashboard. There will be an option to toggle this button to “on” for specific search cycles so that ministers may receive search newsletters from the UUA Transitions Team.

[Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

- You do not need to be in search to be on the list. Ministers considering entering this search cycle may sign up as well.
- Search team members are automatically included if their email is in the MinistrySearch system.
- Interim ministers who are subscribed to the interim-I listserv are automatically included on this list.

Eligibility for Ministers in Search

Fellowshipped Ministers and Access to Search

- The MinistrySearch system is open to ministers in Fellowship with the UUA.
- Transfer candidates from other denominations should contact the UUA's Credentialing Office to learn about the process to becoming credentialed as a Unitarian Universalist minister. The Credentialing Office tries to make this as easy as possible, yet the process generally takes two years.
- Ministerial candidates who have a scheduled Ministerial Credentialing Committee (MFC) appointment may access the MinistrySearch system to begin a ministerial record. Candidates may not apply for any position prior to being cleared for search by the MFC. The Ministerial Credentialing Director, in consultation with the Transitions Director, can approve specific requests of candidates for contract ministries only of no more than one year. Students and Ministerial Candidates who have not seen the MFC must obtain permission from the Credentialing Director for permission before reaching out to the UUA Transitions Team about potential positions they could serve.
- Non-fellowshipped ministers are not allowed to access the system. All congregations should be wary of any minister who will not access the MinistrySearch system and still wishes to apply to their congregation.
- Some ministers are on restrictions from some searches. Ministers under such restrictions should only apply for positions which their restrictions allow.
- **Congregations in search: If a minister reaches out to you about your position and seems unwilling to use the MinistrySearch system, you are strongly encouraged to contact your regional staff or the UUA Transitions Team to determine if the minister is eligible to serve.**
- All ministers are encouraged to be members of the UU Ministers Association (UUMA). All ministers in search must follow the guidelines of the UUMA whether they are a member or not.

Three Year Rule

for intern and student ministers, interim ministers, and other professional staff

- Per Ministerial Fellowship Committee rules, a minister is not eligible for employment in a ministerial capacity in a congregation for at least three years following previous engagement as an intern or interim minister in that congregation. Waivers may be granted by application to the Ministerial Fellowship Committee.

Inside Candidate and Professional Engagement Rule

- Per Ministerial Fellowship Committee rules, any minister who has visited a congregation in a 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.

- Per UUA Transitions Team policy, to promote fairness to inside candidates and potential external applicants, a decision about the candidacy of the inside candidate must be made before the search is opened to potential external applicants.

Inside Candidate Process

the way to move from a contract ministry to a call using the settled ministry search process

Per Ministerial Fellowship Committee rules and UUA Transitions Team policy, certain ministers are only eligible to be called to a congregation through the settled ministry search process as an inside candidate:

- a minister who is a member or staff member of a congregation seeking a settled minister (this could be a contract minister who is serving year-to-year or a second minister)
- an affiliated community minister
- a minister who has visited the congregation in a professional capacity since the departure of the most recent settled minister was announced.

While a congregation could simply decide to vote yes or no on inside candidacies without a search team due to congregational polity, the UUA Transitions Team recommends a congregation follow the standard search process with modifications when looking at calling their contract minister. The standard search process is this handbook.

The process modifications for inside candidate consideration are fairly simple and much of the process remains intact:

- The congregation still elects a search team by the recommended process.
- The search team still leads the congregation through the learning process of what kind of ministry it needs next.
- The search team still compiles search materials as the handbook requires.
- The search team prepares the congregational record and shares it with the inside candidate.
- The search team will prepare for pre-candidating.
- The search team will make a recommendation to the entire congregation. If this includes a candidate recommendation, there will be a candidating week and a vote.

Yet, there are some differences:

- The search team must consider whether they will consider an inside candidate. Ideally, this is their idea, and they ask the contract minister to apply for the settled position. If the contract minister asks, then the search team must decide whether this is a viable possibility and then move on after the decision.
- Cottage meetings may focus not only on congregational needs but how the potential inside candidate would fill those needs.
- Once the congregational record is reviewed and shared with the inside candidate, the search team requests the ministerial record of their inside candidate from the UUA Transitions Team.

- The UUA Transitions Team will release the ministerial record to the search team early and the search team will have a pre-candidating weekend with the contract minister/inside candidate.
- After the pre-candidating weekend, the search team will meet to decide whether to recommend the minister as their candidate.
- If the minister is recommended as the candidate, the search team alerts the UUA Transitions Team of their decision and may schedule a candidating week beginning as early as January with the contract minister as their candidate.
- If the minister is not recommended as the candidate, the search team alerts the UUA Transitions Team of their decision and to discuss their options, which include continuing or suspending the search.
- If the search team continues the search, the congregational record may be published in early December for potential external applicant consideration, pending official notification to the inside candidate and approval from the UUA Transitions Team.
- If the inside candidate is called to the congregation, the search portion of the transitions process is complete. The new contract may be initiated at either the end of the current contract or sooner if both parties agree.
- If the inside candidate is not called, the search is ended for the year for a settled position and the search team and congregational leadership should consult with the UUA Transitions Team for options.

Some tips:

- Inside candidates must express interest to the search team and the UUA Transitions Team early in the process.
- Per UUA Transitions Team policy, the search team must make a yes or no decision on the inside candidate before their congregational record may be viewed by other potential applicants. Congregational records are published for review by all searching ministers in early December, so it would be beneficial for the search team to know before that date whether they are moving forward with their inside candidate.
- If a congregation has more than one inside candidate, they should contact the UUA Transitions Team for guidance on how to proceed.
- If ministers present themselves as inside candidates to a search team and are not selected to be the candidate, they should leave the congregation, especially if there was an awareness in the wider congregation that the minister presented themselves as an inside candidate. In the past, ministers who presented themselves as inside candidates and were not selected have left the congregation so as not to divide the search team (and ultimately the congregation).

Differences between a Senior Contract Minister and a Second Contract Minister

There are some significant differences between a congregation where the only minister is a contract minister versus a congregation that contracts with a second minister (assistant minister). These differences become noticeable when a second minister is the inside candidate for the senior ministry role. One difference is perception. The solo contract minister is likely already seen as doing all the functions of a called minister. A second ministry may be in a more confined role and there may or may not be assumptions and opinions of how the second minister would assume the new role. In some ways, congregations have a tough time making this shift. Thus, many second ministers wanting to become called senior ministers face difficulty

being seen in a new ministerial role. Unless there has been preparation by the outgoing minister and the congregational leadership, such succession is likely to be challenging. Rarely has the suggestion by a second minister that they could be the senior minister led to them being called as senior minister. When the idea originates and is owned by the congregation, success is more likely.

Another difference, though not unrelated, is about trust. The solo contract minister has earned the trust of the congregation in all roles they are expected to perform. The second minister candidate is more likely to have to earn trust in what appears like a new role to the congregation. And while the congregation may have trust in the second minister in the current role, new responsibilities and expectations require new trust. Additionally, some congregants may really like the second minister in the ministry they had done and may want to pull them back into that ministerial role.

A minor note on pre-candidating weekends with an inside candidate: often a search team wants to see a minister preach so they can really grasp the second minister in a new role, offering a vision for the entire congregation. This is less likely when there is a solo contract minister. It is up to each search team to decide how best to meet its needs to make the decision to make a candidacy offer.

Timing

While the timing above suggests that the process for calling a contract minister mirrors the settled search process, a contract minister may be called at any time. Once the decision on candidacy is made, the timeline for moving forward is up to the candidate minister and congregation.

Voting

If a search team decides not to recommend a contract minister for a call, the search can continue in the typical search process, provided this decision happens at a time which aligns with the settled search timeline. If a vote happens by the congregation on a candidate, the congregation should discuss options with regional staff and the UUA Transitions Team to explore best options, though moving directly back into the search process is not generally recommended.

Is There Another Way to Call a Contract Minister?

An alternative path to calling a minister who is already in a ministry partnership with the congregation is the contract-to-call process which is laid out in our [Transitional Ministry Handbook](#). This process generally works well for contract ministers already in senior or solo ministry roles. In the contract-to-call process, the congregation would not likely be eligible to enter an external search immediately for settled ministry if the call process does not yield a settlement agreement; instead, they would likely search for a transitional minister (contract or interim). The UUA Transitions Team can provide guidance on next moves should the candidacy not work out.

FAQs

Why does the search process take so long?

Because the entire congregation has a part in selecting the next settled minister, the process to get the entire congregation ready takes thought, time, and care, more so than if a CEO decides to hire someone. Imagine how much longer finding a professor would take at a university if every student had a say and got to vote. It takes intentionality to help a community move toward a 90-95% majority vote to call a minister whom the congregation hopes will stay for several or many years. The search process requires the congregation to engage in the emotional process of change and to move toward a new future together.

Why can't we just get another minister now?

You could get a contract minister, though the pool of potential ministers is likely to be smaller and the ministries tend to be shorter in duration. Ministers seeking long-term, settled ministry positions tend to prefer a congregation that has done interim ministry and are less likely to look at contract ministry positions. Still, the contract ministry search process is easier on congregations than the settled search process and is more likely to yield a ministry partner for congregations with fewer than 125 members, budget concerns, or indecision about the way forward in ministry partnership. Board members who are not sure if the settled search process is right for their congregation should check out the [Transitional Ministry Handbook](#) and be in touch with the [Congregational Transitions Director](#).

What's the average tenure of a minister? Is there a minimum length I should think about to be called?

*Across denominations, seven years is the average length of ministry most often cited. Whether that's true or not is a good question. In your calculation, would you measure only ministries that ended to figure out an average or include those continuing? **Regardless, ministers should not commit to a settled ministry unless they are prepared to stay for at least four years, and congregations should not seek a minister using the settled search process if they are unprepared to offer and sustain the full-time, settled ministry position for four years.***

I'm a minister in search while serving a congregation. When and what should I tell the congregation I serve about my search for another settled ministry?

Ministers need not inform the congregation they serve at all until they are named a pre-candidate for search. Once a pre-candidate, ministers should have at least one current congregational reference available to the searching congregation. Once ministers accept an offer to be a candidate, they must inform their current congregation about this offer. Be mindful of the timing of the departure notice required by your agreement with the congregation you are serving. Congregations must have time to apply for an interim minister.

How many ministers and congregations are in settled search every year?

The number of congregations in search over the last decade or so has ranged from 21 to almost 70. An average year has ~30 congregations in search. Over the last decade, the number of ministers in search has ranged from 58 to 130.

Our congregation is facing a negotiated ending with our minister. Who can help us? How will this affect our search process?

UU Ministers Association Good Officers (with the specialized contract/call negotiation support portfolio) and UUA Congregational Life staff are trained and equipped to support ministers and congregations in negotiating ministry endings which are as equitable, kind, and clear as possible. Congregational leaders should reach out to their regional staff contact or the [Congregational Transitions Director](#) and ministers should reach out to a specialist Good Officer for support as soon as they realize a negotiated ending is likely.

Ministers in search are likely to ask a search team what responsibility the departing minister(s) and congregation had in the ministry's end. Given that they are likely to talk to the interim minister(s), the minister whose ministry ended with a negotiation, and regional staff, search committees should be prepared to share their understanding of the ministerial departure and what happened. Also, the search team should share what the congregation learned from the negotiated ending. Congregations unable to reflect on and learn from the ending of the last ministry during the interim time are likely to see fewer interested ministers during the search process. No one believes the negotiated departure was entirely one-sided; everyone bears some responsibility.

Do we have to spend all this money on search? I don't think we have the money for it.

Again, contract ministry is an option, though in a contract ministry, the congregation has not invested in the new ministry in the same way. Still, most congregations with more than 125 members can find the money for settled search and find it to be a worthwhile endeavor. The congregation should NOT fund this search by reducing the interim ministry or other congregational staff compensation.

Calendar

See the [Transitions website](#)

Forms and Links

- [Board Search Checklist](#)
- [Settled search calendar](#)
- [Transitional Ministry Handbook](#)
- [UUMA Guidelines](#)
- [Second Ministry Search Handbook](#)
- [Transitions Support for Congregational Staff](#)
- [Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

Discussion Prompt

Successful ministry:

What makes for a successful ministry? What would that be like for you, whether you are a congregation or in ministry? What do you need from the minister(s) or congregation to consider a ministry successful?

Phase One: Concluding a Ministry Well

Background Information to Improve the Odds of Better Decision Making

The most important and underrated act of ministry is leaving well.

This applies both to ministers and to congregations. All too many rush to end the ministry and move on to what is next without taking a moment to breathe and reflect. Yet nothing better sets the stage for a successful ministry to follow than the congregation and minister(s) ending the ministry as well as possible. This starts as soon as it is public that the minister(s) is leaving. How a ministry is remembered---how the story of the ministry is told---shapes the next ministry. This is a moment for the congregation to remember that people will need time to be able to move forward, that not everyone is moving at, or should be moving at, the same pace. For many, this will involve grief---grief over the loss of the ministry, and, in some cases, grief over what the ministry could have been.

Congregations and ministers that take the time to conclude a ministry well, to express gratitude and good wishes, set themselves up for a better next ministry.

Key Elements

Saying Goodbye Well

Once it is known that the ministry will end, congregations and ministers should take some time to express gratitude for the ministry, celebrate what was accomplished together, and wish each other well on what is to come. While there are often lots of other preparations to make as the congregation moves toward an interim ministry, and ministers focus on their next ministry, work, or retirement, the importance of pausing to honor what has transpired in the ministry should not be seen as trivial.

Without question, very few people, whether ministers or congregants, are taught how to say goodbye, let alone how to do it well. People will need to do this in their own time and own ways. Congregants will want to talk to the minister. This is a very pastoral time, which is as it should be. This is often a time when members who had expected a minister to preside at their memorial service will want to talk with the minister, or a youth will need to say thank you for talking with them through a rough time. Congregants will want to reflect with the minister about how they were there to bury a parent, perform a marriage for an adult child, or bless a newborn. Ministers and leaders will want to reflect on what was accomplished.

If an ending of a ministry was abrupt and without people having had a chance to say good-bye, both the minister and the congregation may need additional time to be able to move on to the next ministry. Abrupt endings have often led to significant anger on the part of a congregation and minister, which have followed each into their next ministry, often with unintentional negative effects and consequences.

If the ending of a ministry was complicated or hard for the congregation or minister(s), this will not be true for all involved. While some may have had difficulties, others will remember a kind word, a sermon, or a prayer that stuck with them. If the ending was particularly hard, this is not a time to punish. Covenants and policies about behavior are likely in place to set good boundaries. Congregations needing additional help should be in contact with regional staff. Ministers should be in touch with colleagues. Hard times like these usually require objectivity from outside the congregation.

Most ministries end with all finding appreciation for the ministry in at least some way. Both ministers and congregations are reminded that the ministry doesn't end at the announcement; rather, the ministry just takes a different form. Very few ministers and congregants think about the end of a ministry when a ministry starts, yet this is the one element most likely to affect how the ministry will be remembered.

Notice of Ministerial Transitions

Once the announcement is public, congregational presidents/administrators should complete the [Notice of Ministerial Transition](#). The form will alert both regional staff and the UUA Transitions Team that the information is public to the congregation and that the process needed to move toward interim ministry can begin.

UUA Staff Support

UUA Transitions Team:

- **Rev. Patrice Curtis**, [Transformational Interim Ministries Director](#): works with interim ministers to support them in their role as change agents, provides support for inclusion work throughout the search process, manages Break Barriers, Build Beliefs program
- **Rev. Eric Kaminetzky**, Interim Settled Ministry Transitions Director, holds the settled ministry portfolio for the Ministries and Faith Development staff group, main contact for ministers in a settled ministry search
- **Christine Purcell**, [Congregational Transitions Director](#): holds the ministerial transitions portfolio for the Congregational Life staff group, main contact for search teams and boards in search, manages search team retreat leaders, member of the Congregational Life Leadership Team
- **Amy Szen**, [Transitions Administrator](#): sends communications from the UUA Transitions Team, helps troubleshoot issues with congregational records in the MinistrySearch system, maintains records, helps search teams use the MinistrySearch system

UUA Transitions Team: transitions@uua.org (this email address reaches the whole transitions team).

Other UUA staff members providing direct transition support to congregations and ministers:

- **Jan Gartner**, Associate Director of the Church Staff Finances staff group who provides support for ministerial transitions, manages compensation consultants, provides guidance on equitable compensation and benefits
- **Sean Griffin**, Compensation and Benefits Specialist, member of the Church Staff Finances staff group who provides guidance on equitable compensation and benefits

For compensation questions: comp@uua.org (this email address reaches the compensation team)

Contacts for Congregational Leaders

Canada East	Linda Thomson	linda@cuc.ca
Canada West	Joan Carolyn	joan@cuc.ca
Central East	Christine Purcell	cpurcell@uua.org
MidAmerica	Christine Purcell	cpurcell@uua.org
New England	Christine Purcell	cpurcell@uua.org
Pacific Western	Christine Purcell	cpurcell@uua.org
Southern	Christine Purcell	cpurcell@uua.org

The five regions of the United States and the two regions of Canada have staff ready to assist congregations at a time of transition. From the UUA's Congregational Life staff group, the Congregational Transitions Director, in collaboration with your regional staff, will guide your congregation's leadership through the process as you move toward the next ministry (in Canada, it's simply your regional staff person). This includes sharing an overview of the timeline and process of search, conducting exit interviews, assigning a search team retreat leader, and providing a listening ear and support throughout the search process. They often assist with the interim ministry search as well, though often the UUA Transitions Team may be more directly involved due to the short timing.

Which Type of Search Should Our Congregation Engage?

Your congregation's leadership and ministry will be held in care by a team of UUA staff members as you move into your next ministry search. Before your ministry search begins, Congregational Life and/or Transitions Team staff will meet with your leadership to discuss your ministry needs, context, and history. UUA staff will customize a recommendation for your congregation's transitional ministry search to try to ensure that your ministry needs are met and to increase the probability that your search will not end in a brief, conflicted ministry match.

For many years, after difficult ministry endings, ministers have been required to engage a UUA hold or review process, which sometimes includes professional development or personal work, before engaging their next ministry searches. The UUA policy of reviewing the congregation's needs, context, and history and recommending an appropriate type of search before initiating a ministerial search adds mutual, congregational accountability to the search process. By pausing to reflect with congregational leaders at the end of ministries, especially those which ended in conflict, before rushing toward ministry searches, the UUA Congregational Life staff team hopes to support congregational leaders in making decisions that will yield sustainable, vital, future ministry matches. Beyond recommendations for ministry search, this support could take many forms and be ongoing: coaching, training, leadership experiences, the Hope for Us conflict engagement process, UU Leadership Institute courses, etc.

One way UUA staff can extend special care to a congregation which is in conflict or has had a hard ending with a minister is to provide search guidance. A certain type of ministry search may not be recommended for a congregation immediately simply because it is the one the congregation has always engaged in the past. Other types of ministry search should not carry a stigma because they might indicate some work that is ongoing or needs to be done by a congregation. A recommended extra year of interim ministry or a pivot to developmental ministry can make a big difference for congregations working on structural or cultural change work between settled ministries.

Types of transitional ministry search (see the [Transitional Ministry Handbook](#) for more information):

- **Contract:** the simplest and most flexible type of ministry search. While this is a transitional ministry, and begins with a board hire, it may lead to a congregational call if a good match is made. *Congregations with fewer than 125 members should almost invariably use this type of search.*
- **Interim:** a transitional ministry (board hire), usually 2 years long, between settled ministries (congregational calls) or before a developmental ministry. Congregations may not call interim ministers.
- **Developmental:** a transitional ministry (board hire) recommended by Congregational Life staff or an interim minister, usually 4-7 years long, during which the congregation works on significant cultural or structural change goals with an experienced ministry partner. Congregations may not call developmental ministers.

After engaging an interim or developmental ministry, your congregation may be ready for a settled ministry search:

- **Settled:** the search is conducted during the last year of an interim or developmental ministry and culminates in a congregational call of the candidate identified by the settled search team.

Just as UUA staff considers the history, skills, and traits of ministers when making recommendations for their searches, congregational history, traits, and preferences inform recommendations for congregational searches (not an exhaustive list):

- How the current/last ministry went/ended
- Evidence that past interim work has continued into settled ministries
- Level of self-awareness and accuracy of self-representation in past searches

- Evidence of healing from trauma in congregational dynamics
- Conflict transformation skills
- Turnover rate of religious professionals
- Ability to take responsibility for and learn from the congregation's part in past conflicts
- Good ministries and endings with religious professionals with marginalized identities
- Openness about ministry endings (participating in exit interviews, no non-disclosure agreements)
- Respect and trust for professional ministry partners
- Understanding of congregation's shared ministry obligations, and appropriate expectations of ministerial partners
- AR/AO/MC commitment, including participation in "Breaking Barriers, Building Beliefs" during settled search
- Relationship with the UUA and Annual Program Fund
- Stability of leadership structure
- Sustainability of professional ministry (less than full-time is automatically a contract ministry search)
- Whether UUA curation of the list of applicants (ministers with full fellowship or a particular type of experience, for example) would be beneficial and welcome for congregations with significant conflict or misconduct
- Cultural change work which the congregation wants or needs to engage
- The congregational understanding of Unitarian Universalist theology
- The understanding of the discipline and practice of covenant

In addition to recommending types of ministry search, UUA Congregational Life staff members review congregations' ministry search profiles and, in some cases, offer guidance on congregational needs and history to include in the search profiles in order to maximize the chance that applicant ministers will understand and be equipped for the challenges the congregation has faced or is facing. When congregational leaders gloss over past misconduct or current conflict, for example, ministers do not know what they need to know before applying.

Church Website and Social Media

Congregations should be aware that, as soon as it is public that their minister(s) is leaving, ministers begin learning what they can about the congregation from the congregational website. Now is a good time to review the website to see how current the information is and what information will need to be updated and changed after the ministry ends. The same is true for social media.

Exit Interviews

Regional staff will conduct exit interviews with both the departing minister(s) and congregational leadership. This is information that is shared with the UUA Transitions Team, regional staff, the interim minister(s), and the next settled minister. Ideally, these are completed prior to the end of the ministry, or at least before the arrival of the interim minister.

Exit interviews allow for reflection and storytelling and are often a part of bringing closure to the ministry and setting the stage for upcoming ministries.

Here are the baseline questions we use:

- What went well during this shared ministry?
- What were the biggest challenges during this shared ministry?
- What did you learn during this shared ministry?
- Why did the ministry end?
- How was conflict handled during the ministry?
- How was the ministry shared between the minister, staff, and lay people?
- Were there any cultural shifts in the congregation during this ministry?
- What are your hopes for the future of this congregation's ministry? Concerns?
- Is there anything else you would like the UUA to know?

Budget Considerations for a Settled Ministry Search

Our UUA recommends that congregations with settled ministers put aside funds during every year when they are not in search to prepare for sabbatical coverage or for their next ministerial search. The costs below are representative of the amounts which should be budgeted for the interim ministry search through the beginning of the next settled ministry.

- Relocation expenses for interim minister: up to \$10,000
- Search team budget: between \$10,000 and 18% of the projected salary and housing amount for the settled ministry
- Settled ministry search support: \$1,000 - \$3,500 The amount is determined by the congregation's level of support of our Association's Annual Program Fund (APF)
 - Standard cost of search support: \$3500
 - Discounted support cost for congregations which have contributed 85% or greater of the APF Honor amount over the last three years: \$2000
 - APF Honor discounted support cost for congregations which have contributed 100% of the APF Honor amount over the last three years: \$1000
- Relocation expenses for settled minister: up to \$15,000
- Installation: up to \$3,000

Special Notes for Canadian Congregations: As members of the CUC, you are not required to support the UUA's Annual Program Fund. There is no congregational fee for search support. You may have additional costs if your minister comes from the states. Please inquire directly with the UUA Transitions Team about "Break Barriers, Build Beliefs" costs which, for US congregations, are included in the search support.

Interim/Transitional Ministry

Congregations should have a two-year interim ministry between settled ministries. Most ministers searching for settlement expect and rely on an interim/transitional ministry to follow a settled ministry.

For more information, please see the [Transitional Ministry Handbook](#).

Why You Don't Form a Settled Search Team Immediately

Historically, the selection of a search team happens between the middle and the end of the first year of interim ministry, when the congregation has begun to shift from looking backward and reacting to the last ministry to looking toward the future. So, for example, if you expected the call of a new settled minister in August of 2026, you would form your search team in the spring of 2025. This timing allows the congregation to do its necessary work of saying good-bye and moving into interim ministry. Often, at the time of the ending of a settled ministry, a congregation's anxiety is high. A search team is likely to work better on behalf of the congregation after the anxiety has settled, once the interim work has begun, and when the congregation elects them from a position of looking forward, not backward.

Timing

It takes longer to say good-bye, and to do it well, to a ministry than most people would imagine. Individuals are likely to say, "I'm ready to move on." But a congregation is a system of people, and moving systems takes longer than moving individuals. Some people may never be completely ready to move on to a new minister, but when "a tipping point" number of people are ready to move forward, the congregation is likely to be ready. Some people just need more time. Allowing people to move at their own pace is an act of community.

A metaphor for the length of a previous settled ministry: when you break a bone at 20, you heal quickly, especially compared to a 70-year-old person. The longer the ministry (the older the person who broke a bone), the more time is needed. The broken bone metaphor holds true on how complicated/traumatic the settled ministry was--how badly is the bone broken? A fracture will take less time than a bone that is shattered. The more difficult the ministry, the more time needed to heal from it.

That said, extending the metaphor: sometimes a hidden and slight fracture is often ignored, there is a rush to do too much too soon, and a reinjury is more likely to occur. Rushing to "get

back to normal” often holds the myth that normal is a constant. Letting time and process be your allies allows you to improve the odds to get to the new and next normal.

Be patient. Be kind. Help everyone to be a part of a good ending to a ministry. This ultimately serves the congregation and departing minister(s) better.

FAQs

Our minister is retiring. Can they come to church and be our friend?

Any departing minister must make a covenant with the incoming minister, and then each subsequent minister. Most ministers know to stay away during the interim time to allow the congregation to more easily move to its next ministry. Even ministers emerit almost always stay away initially. Congregants should not ask for ministerial services from the departing minister. The departing minister should discuss this with the incoming ministers and establish clarity within their covenant about boundaries and acceptable practices. Ministers are expected to know the guidelines and to honor their responsibility to other ministers. Ideally, the outgoing minister has developed a system of support outside the congregation, whether it be friends or family. If your minister is staying in town, and you see them in public, you are, of course, free to say hello. But the outgoing minister knows it is no longer their role to be your minister.*

Our minister has asked us to make them minister emerit*. What does that mean and how do we consider it?

[Minister Emeritus/a policies](#) can be found on our website. In general, these conversations and decisions better serve the congregation before the interim ministry begins or, preferably, after the interim ministry has ended. Any minister emerit should form a covenant with the current serving minister of the congregation.*

Should we take the ministers’ sermons down from our website?

In an ideal world, ministers have their own websites where their sermons are posted. In this case, the link to the ministers’ websites should be removed from the church website by the end of the ministry.

Do congregations ever do something else than interim ministry?

Some congregations, in working with regional staff and the UUA Transitions Team, do get recommendations for other options to consider. And while there is congregational polity, UUA staff hold the big picture about what works best for congregations. A successful call for a settled ministry is most likely to happen after at least two years of interim ministry. Any congregation that is below full time (less than 100%) is a contract ministry for search purposes, though interim work in a contract ministry is almost always needed. The same transitional ministry training that

is required for interim ministers is available for ministers found through the contract ministry search process. Get in touch with the UUA Transitions Team for more information about this training.

Calendar

Minister announces departure (recommended)	Feb-Mar
Congregation submits Notice of Ministerial Transition	Feb-Mar
Consultation with UUA Transitions Team/regional staff	Feb-Mar
Church website review	Feb-June
Exit Interviews with minister and leadership	Mar-Aug
Interim ministry application and search	Mar-May
Interim ministry begins	August 1st
Board meets with Congregational Transitions Director	Winter/Spring

Forms and Links

- [Notice of Ministerial Transition](#)
- [Transitional Ministry Handbook](#)
- [Minister Emeritus/a Policies](#)
- [Board Checklist for the Settled Search](#)
- [Settled search calendar](#)

MinistrySearch System

The interim ministry search process occurs within the MinistrySearch system. The congregation's president or their designee will request the initiation of an interim search by emailing transitions@uua.org. Interim searches may be initiated as of February 1st.

Initiating a search means opening a congregational record (also called a search profile) in the MinistrySearch system. When search team members log into their dashboard, also called "Application Portal" at the top of the page, they will see blue hyperlinked sections of questions to click and complete; the application portal and dashboard are the same thing, and all of the information therein constitutes the congregational record or search profile.

Discussion Prompts

Discussion: Moving On

"Now that the minister is leaving, we just need to get another minister right away. We know we want someone exactly like this minister (or who is the exact opposite of this minister). Let's just

form a search team and find someone,” says one member of the congregation. How would you respond?

Discussion: Your Last Ministry

In your last ministry (either for ministers or congregations), what did you do well, and what do you wish you’d done better?

Phase Two: Education and Preparation for Search

Background Information to Improve the Odds of Better Decision Making

No two searches are alike. There are various factors that affect each search cycle—the number of ministers, the number of congregations, the size of the congregations in search, geography of the congregations in search, and the cultural context at the time of the search. Perhaps most importantly, neither ministers nor congregations are in the same place as they were when last they were in search.

Education and preparation for the search also asks congregations and ministers to do some reflection—to notice where they are at this moment. Each should ask the question, “What kind of ministry is needed now?” Also, “How are we different than the last time we were in search?” Congregations and ministers able to assess these questions with some thought, depth, and self-awareness are more likely to succeed in the search process than those who rush.

Ministers want to work with a congregation that has taken its time to answer these questions, one that can reflect honestly about what the congregation needs in ministry, what its strengths and challenges are, where the sore spots are covered up by bandages, where “stuckness” exists, and where hope needs to be kindled or rekindled. Ministers want to know that their skills can be well used here, that the challenges of a congregation are the challenges that excite them professionally, and that the congregation can identify what work it needs to do and where a minister can help.

Ministers offer a lot of answers to congregations, but they alone do not have all the answers. The congregations that serve themselves best in the search process are clear about what they need from a minister and about the fact that the minister is not the answer to everything they need. In some ways, congregations are best served by ministers who help congregations be their own problem solvers and who know when to get help or resources from outside the congregation: from the denomination, the wider community, or other ministerial colleagues.

Ministers serve congregations and themselves best by knowing their own strengths and limitations, too. Ministers who know they can’t do something and say so better serve a congregation than ministers who say they can do something and cannot. Often, the biggest obstacle for ministers is time—the time to get everything done and done well.

The time demands of ministry are often hard for a congregation to understand since so much of ministry is invisible or seen as superfluous. It is often hard for a congregation to recognize the amount of pastoral care it needs. Indeed, most congregations underestimate their pastoral care needs, often significantly, and thus underestimate their spoken expectations whilst still expecting this care to automatically happen. To be fair, ministers can also underestimate how much time and skill are needed for pastoral care.

Rev. Robert Fulghum once wrote, “To pay attention is to sanctify existence” (from *Beginning to End: The Rituals of Our Lives*, Villard Books, 1995). Sanctifying existence is a huge part of ministry, and paying attention is harder pastoral work than most people understand.

Paying attention to the entirety of the search process from beginning to end will improve the odds of a better search. Educating and preparing for search is vital. Has the congregation done the interim work to look toward a new future? Was the search team selected in a way that builds trust from the rest of the congregation? Has the minister prepared their materials thoughtfully and talked to other colleagues who have recently been in search to find out what they learned?

The ministerial search process can feel overwhelming, especially when congregations and ministers rush. Learning about the flow of the search cycle, breaking down the process into phases, and doing each element within each phase helps make this process more manageable.

Key Elements

Congregational By-Laws

The congregation's leadership and interim minister should review the congregation's by-laws about the search process. If the search process is mentioned in the by-laws, ideally, they state that the congregation should follow recommended practices of the UUA. The board may want to discuss these by-laws with the Congregational Transitions Director in initial conversations about the search, especially if the by-laws do not align with UUA recommended practices.

Board Overview of the Ministerial Search Process

The Congregational Transitions Director meets virtually with and holds open office hours for governing boards (and any other leaders/staff they choose to invite) during the winter after the interim ministry begins. The board should request a call with significant advance notice if they would like this conversation to be held outside of working hours. The Congregational Transitions Director provides an overview of the search process which includes:

- A conversation about any by-law requirements that may be inconsistent with current recommended practices. It is not uncommon for a congregation to update and amend their by-laws to follow recommended practices.
- Resources on the Transitions website
- Access to the MinistrySearch system
- The use of a compensation consultant
- Budgeting for the search process (search team expenses, relocation)
- UUA compensation standards (legal requirements, salary and benefit recommendations)
- How to select a search team
- Roles of the board, interim minister, search team, and congregation in search process
- Confidentiality

- Ministerial agreement & a negotiating team
- “Break Barriers, Build Beliefs” program
- Previous ministers or ministers with emerit* status
- The search overview for boards and search teams offered on Zoom each year in June

The Congregational Transitions Director can provide materials for a congregational overview of the search process, as well.

Selecting a Search Team

- The search team should represent the entire congregation.
- The search team should be trusted by the congregation.
- The search team should be in touch with the changing nature of the congregation.
- The search team should be responsible for developing a good process for itself, the congregation, and Unitarian Universalism.

Selecting a search team is the work of both the leadership and the entire congregation. While congregational by-laws may indicate a procedure for forming a search team, and while congregations ultimately have the ability to make their own decisions, ministers are more likely to be interested in serving a congregation where the search team is representative, trusted, in touch, and responsible to the entire congregation.

Many of our congregations do not have racial diversity that matches their surrounding community. “Representative” is not defined here as based on congregational identity statistics. It does not mean checking certain boxes: one of this type of person; more of these (because there are more of them in the congregation); and one of this type of person (because we think we should). Nor is it the role of a search team member who identifies themselves as part of a marginalized community to advocate for a candidate minister from a marginalized community simply based on a (perceived) shared identity. These are examples of tokenism.

To avoid tokenism, it is critical to commit to creating space for all perspectives to be heard and honored equally during the process. In this way, the search team and congregation will benefit from rich, diverse perspectives. For more information, see the section on “Breaking Barriers, Building Beliefs.”

Years of trial by interim ministers, UUA staff members, and volunteers who support ministerial search have yielded this recommended selection process. This process can be time intensive. Experience has shown that it produces good results and a high degree of respect and trust for both the new search team and the board.

1. The board and probably the leadership development (a.k.a. nominating) committee divide up all the households in the congregation and place a call to every single

household (some larger congregations use staff and other congregational leaders to spread out the calls). Every year, some congregations are tempted to try to use a form to collect nominations instead of personal outreach, but to do so would eliminate conversation and the ability to ask questions. A form could be used to collect responses from folks who cannot be reached by phone. Inclusivity calls for multiple approaches!

2. Each household should be engaged in a conversation around questions like these:
 - What are the good qualities needed for someone to serve on a ministerial search team?
 - Who in the congregation works well with others and listens well?
 - Who can represent and serve the whole congregation well (including looking out for the needs of children) and not just a piece or “faction” of the congregation? Who would have no “axe to grind?”
 - Who knows (or can learn) the history and culture of the congregation, whether a member of long standing or relatively new? Who can use this history proactively instead of reactively on behalf of the congregation?
 - Who has been and/or is active in the congregation and has demonstrated both responsible participation and responsible leadership?
 - After a high salary and desirable geography, the most attractive quality a congregation can have is self-awareness – awareness of strengths and challenges, what the congregation is like at its best and at its worst, as well as on an average day. Who would be able to know and relate all this to potential candidates?
 - After thinking about all of these questions, whom would you trust to serve on the search team on behalf of the congregation?
3. The board or nominating team caller should record the names listed in response to the last question. An easy way to do this is to make a simple Google (or other) form for callers to log names of people making nominations and those nominated for the search team.
4. Someone in leadership, perhaps the interim minister, lovingly reminds the callers to make the calls and folks in the congregation to be sure to respond to the calls.
5. Someone on the board, a good data manager, collects all the suggested names from the callers and makes a spreadsheet (or uses the spreadsheet automatically generated by the Google form used to collect names), noting how many times every person suggested has been named. The whole board need not see all these data.
6. The data manager reports to the board the top 12-14 names. It's best, if possible, to make a list, taking into account any natural break in the numbers. For example, the top 13 people get mentioned more than 20 times. Person #14 is mentioned 15 times. The next three are mentioned 14 times. The natural break is after person #13.
7. Board members call this short list to see if these people are interested in running and if they agree to give up any other leadership position they hold if chosen for the search team. **They should also check on their availability and commitment in the fall through the spring of the search cycle (August-May). All search team members should be available for all pre-candidating weekends (February and March weekends).**

8. It is helpful to have everyone on the ballot fill out an information sheet or prepare a short biographical statement that includes information about why they are interested in serving on the search team. These forms or biographical statements together with pictures should be posted in a prominent location for at least a few days before the election. This is especially helpful in a large congregation where not everyone is readily identified by name alone.
9. The board has the option of:
 - a. presenting a slate of potential search team members, with the knowledge that some volunteers will not be chosen by congregational vote or board appointment (a competitive election)
 - b. nominating the full search team to be elected by a congregational vote (a non-competitive election). If a non-competitive election is preferred, the board should carefully choose a diverse team which will work well together (see considerations in item 12 below) from the short-list of folks who are trusted by the congregation and are willing to serve.
10. A written ballot is prepared with the names listed alphabetically. The voting happens at a congregational meeting. Neither self-nomination nor nominations from the floor are considered.
11. Members may vote for up to seven search team members. If someone who is appointed to the search team later drops out, please talk with the Congregational Transitions Director
12. If a competitive election is held, at the end of the meeting the board meets in executive session and counts ballots. Up to seven search team members may be chosen; the board may choose how many members to elect and how many to appoint from the remaining names on the ballot. The appointments are important. This part of the process improves the odds of diversity on the search team instead of a search team composed of, for example, seven beloved elders of the congregation. The broader the demographic the better, especially regarding age, tenure in the congregation, gender, race/ethnicity, ability, and sexual orientation.
13. The board announces the search team, never telling anyone – including the selected search team members themselves – who was elected and who was appointed.
14. The next Sunday, the search team should be introduced with some fanfare. There might be a commissioning moment during the service when the team members are given a charge from the board, and they vow publicly to serve and take the charge seriously.

If you follow this process carefully and thoroughly, you are likely to achieve the best results. Congregations in which this process has been followed with deliberateness and integrity report having a search team that is respected and trusted and one that serves the congregation well.

Ideally this process happens in the time span of a month to six weeks, usually beginning in March and ultimately elected no later than June.

Congregations of 150 members or fewer may consider using a smaller search team of five or six members.

Alternate search team members are not allowed. Should a search team member be unable to continue after being elected, unless very early in the process, the search team should not look

to find a replacement. If the member who is unable to continue departs the search team in the first few months, the search team should check in with the Congregational Transitions Director for options. **Search teams should remember that any work that isn't deemed confidential may be done by someone from the congregation who is not on the search team.**

Search Team Time Commitment

The time commitment for a search team member varies based upon the role the search team member takes on, whether the team is laser-focused or takes its time with tasks and meetings, the size of the congregation (for surveys and cottage meetings), and the number of applicants (higher in large congregations, congregations with higher compensation, and in desirable geographic locations). Here are some general estimates on the amount of time the search team will need to spend over the year of search:

- Sometime in mid-June to August: 1-2 day retreat with programming led by UUA staff or volunteer
- August through September-October: meeting weekly or 2-3 times each month for planning and discussion (~8 hours each month), administering the survey and holding cottage meetings/focus groups (~15 hours each month)
- November: assessing survey and cottage meeting findings, writing the congregational record: (~30 hours)
- December: if a team is able to assemble their documents packet and plan for the January interviews early, it is possible to have significant downtime in December
- January: first three weeks are extremely busy with initial evaluation of applicants: read each ministerial record, review applicants' websites, decide whom to interview, conduct interviews and reference checks, narrow list of applicants down to 3 pre-candidates (~40 hours)
- February-March: three full weekends of your team's choice in a six-week period with pre-candidates (interviews, social time, a tour of the church building, and a vespers service), plus a week of follow-up and final discernment
- Last week of March: final discussions and rankings of pre-candidates before offer date: ~5 hours
- Early April: planning for candidate week: ~10 hours
- Late April: candidate week activities do not need to be planned or attended by all search team members, though search team coordination and some presence is expected (~15 hours)

Search teams should be deliberate about making the work of search accessible to each member, taking into account abilities, care-giving responsibilities, work schedules, commutes, technical skills, etc. Some search team members have significant gifts, but fewer hours to give.

Compensation Consultant

The UUA has [compensation consultants](#) – skilled volunteers who are trained and supported by the Office of Church Staff Finances.

Each consultant is prepared to talk with congregations about compensation and benefits in the ministerial search process. They can counsel you on salary and housing, benefits, relocation expenses, and best practices as you move into search. Congregational leaders are encouraged to contact a compensation consultant over the summer before a search to get information and recommendations early in the process, rather than later. The compensation consultant can help with other staff compensation issues (which often arise during the ministerial search process) as well as advise the congregation on how to be most competitive and appealing in the search process (hint: compromising on benefits is a really bad idea).

For more information about compensation issues in general, please go to the UUA's [Compensation Resources](#) page. There you will find a link to UUA compensation standards (legal requirements, salary and benefit recommendations).

Feel free to contact a compensation consultant more than once throughout the process. Your interim minister may be a valuable addition to these conversations.

Search Team Budget

The governing board sets the budget for the search team. The budget should cover travel and hospitality expenses for three pre-candidating weekends, travel and hospitality expenses for candidating week, a video conferencing subscription, search team retreat expenses (site rental, meals if in person), and other miscellaneous items (supplies, etc). If you are in an area with higher lodging costs or if airfare to your area is expensive, consider budgeting a bit more.

Other expenses related to ministerial search are relocation expenses and, often, within a year after the call, installation expenses. However, those expenses are not part of the search team budget. Relocation expenses are generally left to the negotiating team, and installation expenses are part of the following year's budget.

Sample budget considerations:

- Search team budget: between \$10,000 and 18% of the projected salary and housing amount
- Settled ministry search support: \$1,000 - \$3,500 (see below)

The Congregational Transitions Director can talk with board leadership about search budgets, should questions arise.

The Cost of Settled Ministry Search Support

Our UUA invests hundreds of thousands of dollars each year to support ministry searches across our denomination. In addition to staff dedicated to transitions work, we provide an

updated, custom MinistrySearch platform, and consultation throughout the search process (including search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop for the congregation, and new ministry start-up programming led by regional staff).

Congregational support of our UUA's Annual Program Fund allows us to budget for staffing and for the design, maintenance, and IT support for the MinistrySearch system. We ask congregations to help bear some of the expense for search support (such as the search team retreat and search-related workshops).

With gratitude, we offer a substantial discount on coaching services to congregations which support our Association's Annual Program Fund at the Honor level, and a moderate discount to congregations which have supported the APF at or above 85% of our UUA's requested amount (3-year average). For congregations which are eligible for these discounts, our UUA budget is used to subsidize search support workshops.

- Standard cost of coaching: \$3,500
- Discounted coaching: \$2,000
- APF Honor discounted coaching: \$1,000

If your congregation has recently supported our APF below the 85% level, an Honor-level giving discount will be applied if you reach an Honor-level giving average of 85%-100% during the years of search.

If you're not sure about your congregation's giving status, the board president may email Christine Purcell, our Congregational Transitions Director, at cpurcell@uua.org before submitting the form to initiate settled ministry search support (below).

Canadian congregations are not bound by this, though they may have extra costs for search as a result of the border.

How to Request Settled Ministry Search Support

The board president initiates UUA settled ministry search support by using [this form](#) (due by 01 June). The search support fee covers workshops which support the settled search (search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop for the congregation, and new ministry start-up programming led by regional staff) for a clear arc of support and a streamlined congregational billing process. Once the form and search team availability are received, the Congregational Transitions Director will assign a retreat leader who will lead the search team retreat programming between mid-June and the end of August.

Early Search Deadlines

The board president should formally let the UUA Transitions Team know that their congregation will be in settled search in the coming search cycle by completing [this form](#) to initiate UUA search support by 01 June. The search team should provide its availability for search retreat programming to the Congregational Transitions Director as early as possible (in May or June). Retreats should be held no later than the first week of September to give the search team time to do its work in the fall.

June Search Overview

The UUA Transitions Team leads an overview of the settled search process on the second or third Saturday in June each year on Zoom. Board members and search team members are welcome to participate in this optional overview. A link to a registration form will be on our [main webpage](#) a few weeks before the event.

Role of the Interim Minister(s)

Interim ministry is an important part of the transitions process. So is the interim minister. The role of the interim minister in the search process is often that of pastor, resource director, reference, practice partner, and colleague to ministers. They are not to be wedded to a particular minister or even to the outcome of the search, as they recognize that search is the work of the congregation. Interim ministers can support good process in search.

Interim ministers, however, are ministers. They provide pastoral support for the congregation during the search process. They may be considered the chaplain to the search team. Often, the interim minister has a brief check-in with the search team (during the first 10-15 minutes of a search team meeting, for example) to provide pastoral support and, if the search team is particularly engrossed in the search process, to convey the status of congregational life. Examples include (without breaking confidences): discussions of the balance between search team work and the rest of life, current frustrations and joys, and sharing news of recent events in the congregation that the search team might not know.

Interim ministers can also be a resource for the congregation, if asked. Interim ministers give useful feedback on the congregational record in the MinistrySearch system. They are good practice partners for mock interviews with the search team. Interim ministers should not be asked, let alone answer, questions about specific applicant ministers.

Searching ministers are encouraged to call the current interim minister at any time to inquire about the congregation. Interim ministers should answer questions they are directly asked. Search teams may ask prospective ministers if they have talked with the interim minister(s). Interim ministers may tell search teams how many ministers have contacted them.

The interim minister(s) may meet with ministers during pre-candidating weekends if the schedule allows. The interim minister should meet with the candidating minister(s) during or before the candidating week. The interim minister should covenant with the newly called minister(s) on how to support and not overburden the colleague during the transition time.

Congregational Website

Congregations are encouraged to ask for “outside help” regarding their website. Regional staff, interim ministers, and other ministers known to the congregation, for example, could all be asked to look at the congregation’s website to identify what the website might express intentionally and unintentionally to prospective ministers.

Additionally, some congregations have made a section of their website a place for search information, a search timeline, and announcements to update the congregation on the process of search.

Ministerial Website

Ministers, in search or not, may have a website that is not specific to ministerial search.

The website can be the public presence of a Unitarian Universalist minister in the wider world. The website should include photos, a biography, sermons (written, audio, video), and anything else the minister would like to include. Some ministers include information about weddings, funerals, memorial services, and child dedications. Many ministers post their blogs and minister’s columns on their website and often there is included some vision for Unitarian Universalism.

Some simple website options for ministers to consider using:

- squarespace.com
- sites.google.com
- wordpress.org
- wix.com
- weebly.com

Search teams want to view videos of ministers’ sermons more than any other information which could be presented on a website, so if a minister does not have a website, they should provide a link to their YouTube channel or a list of links to videos of sermons they would like search teams to review.

Confidentiality

A reminder on the importance of confidentiality throughout the process—the search team will be expected to keep the names of all applicants confidential from the congregation and its leadership. They only announce the name of the candidate. Breaches of confidentiality have led ministers to withdraw their consideration from congregations and have even ended the search process for rare congregations with poor confidentiality practices.

Other Ministers in the Congregation

The interim minister, any other ministers on staff, retired ministers in the congregation, and any ministers emerit* are bound by UU Ministers Association guidelines in the search process around collegiality and confidentiality. They often serve as references on the congregation for potential ministers, though they are to keep these conversations in confidence. No minister on staff or in the congregation should be asked to serve as a broker to prospective ministers, but instead should encourage searching ministers to apply through the MinistrySearch system.

FAQs

Can a member of the board serve on the search team?

This is a conflict of interest. The search team is both independent of and accountable to the board of trustees. A congregational member could do one, but not both. Staff and spouses of staff should also not serve on the search team.

Shouldn't our congregation just select one person from each of the major teams to serve on the search team?

No. The search team should have the trust of the entire congregation. The search team will be in conversation with the congregation about the needs of groups and committees within the congregation early in the search process. Any search team that ignores or pays less attention to an aspect of congregational life does not serve the congregation well. In some cases, there may be more groups in the congregation than search team members.

One of our members really wants to be on the search team but did not get mentioned enough times to be on the slate of candidates. Can they nominate themselves from the floor?

While they probably could do this, if it's in the congregational by-laws, it's not recommended. It goes against the trust the congregation was trying to build in the process. Encourage the member to find other ways to serve in the search process or congregational life.

What additional resources are there?

On a Saturday in mid-June each year, the UUA Transitions Team holds an online orientation to the search process which is open to board and search team members. If you have board members or search team members who wish to be notified when registration opens, please contact transitions@uua.org. Otherwise, registration will be posted in the announcements section of our website in mid-late May.

Christine Purcell, the Congregational Transitions Director, holds weekly open office hours for board and search team members with settled search questions on Thursdays between 3:00 and 5:00 PM Eastern: <https://uua.zoom.us/j/91354359680>

You may also schedule a meeting directly on her calendar: <https://calendly.com/uua-cpurcell>

How can ministers best learn about congregations they might be interested in?

Looking at a congregation's website is a good start. So is talking with the interim minister and previous ministers who have served with the congregation. Talk with UUA regional staff. Look for congruency. Are the issues, challenges, and patterns described the ones you want to encounter as their minister?

Calendar

Review congregational by-laws	Winter
Congregational Transitions Director provides an overview of search	Feb-Apr
Consultation with compensation consultants (review Employer's Participation Agreement on file with the UU Retirement Plan)	Feb-Apr
Approve budget for search team	Spring
Church website update	Spring
Sign up for settled search support	By 01 June
Search team selection	Apr-Jun
Search team reviews Settlement Handbook	Jun 15-July
Search initiated and posted on UUA website	After June 15

Forms and Links

- [Finding a Compensation Consultant](#)
- [General Compensation Information](#)
- [Request Settled Ministry Search Support](#)
- [Settled search calendar for 2025 search cycle](#)
- [Visual Guide: Initiating a Search & Logging into the MinistrySearch System](#)

MinistrySearch System

Once the search team is selected, one member of the team should contact the Congregational Transitions Director to request the initiation of a search in the MinistrySearch system **after 20 June**. Each year, the UUA Transitions Team takes what it learned from the last search cycle to

adjust ministerial and congregational record questions. The Settlement Handbook is updated each year, as well, before the search officially opens on 20 June.

To initiate the search, the Congregational Transitions Director needs the name and email address of one search team member whose email address is recognized by the UUA's data management system. If the email address is NOT recognized, the system will provide additional steps for gaining access.

Once the first person added to the search system receives acknowledgement that the UUA Transitions Team has initiated the search, they may add other members of the search team into the system using their preferred email addresses. No one other than current search team members should be able to access the search profile. Each search team member will need to enter the MinistrySearch system and create their own password. Logins and passwords should not be shared amongst search team members.

Discussion Prompts

The Spouse of an Employee

The spouse of the administrator is a long-time member of the congregation (so is the administrator). They know a lot about the congregation, and someone has suggested to them that they would make a great member of the search team. Someone else says this would be a conflict of interest. Why would it be a conflict of interest? Why might it turn some ministers away from the congregation as an option? Note: this has happened.

Can't Any Minister Serve Any Congregation?

Can any minister serve a congregation? Does it really matter to go through this process? As long as there is good preaching and good pastoral care, why take all the time to go through the search process?

Phase Three: Building the Structure to Search

Background Information to Improve the Odds of Better Decision Making

The early work of the search team is threefold:

1. To earn and maintain the trust of the congregation.
2. To engage the congregation in the search process.
3. To represent the congregation to the wider world of Unitarian Universalism.

This is not the work of individuals, but the collective work of a team. One way the search team earns and maintains the trust of the congregation is to work as a team, speaking with one voice to the congregation, in the congregation, and for the congregation.

The search team can receive assistance in its work from the congregation. While there are aspects of the search that require confidentiality, other pieces are coordinated by the search team and benefit from congregational input and assistance. The search team that maintains connections with the congregation throughout the search and asks for assistance (when it can) is doing important work. Search teams that isolate themselves from the wider congregation often carry more stress, build less trust, and are less representative of the congregation as it evolves throughout the interim time.

The most common mistakes search teams make are isolating themselves from the congregation (both staying out of touch and lessening congregational involvement in the process) and inaccurately interpreting and representing the congregation by downplaying differences in order to present the congregation as being of one mind. Indeed, it has not been uncommon for one experienced minister to ask the newly settled minister of a congregation, “You believed the search team when they said ____?” Ministries have ended early because the one voice presented by the search team was perceived as a mandate and, in fact, there was not unanimity.

Speaking with a single voice does not mean reducing your congregation to a single story. Indeed, the search team that is able to share with one voice the multiple and sometimes conflicting stories of the congregation will represent them well and improve the odds of a better ministry.

Key Elements

Support and Guidance for Search Teams

The UUA Transitions Team wishes you well in the search and is here for you through the whole process. Do not hesitate to reach out if something is unclear, if conflict emerges, or if a fresh

perspective would be welcome. The Congregational Transitions Director offers weekly open office hours for search team members (*on Thursdays between 3:00 and 5:00 PM Eastern*: <https://uua.zoom.us/j/91354359680>) and has a calendar management app so you can schedule meeting times outside of the scheduled office hours: <https://calendly.com/uua-cpurcell>. Get in touch whenever you need help!

From the fall until the search ends in May, the UUA Transitions Team sends out regular newsletters with deadlines and helpful tips to all search team members with MinistrySearch system access and ministers who have signed up for search updates through the MinistrySearch system.

Early Search Deadlines

The board president should formally let the UUA Transitions Team know that the congregation will be in settled search in the coming search cycle by completing this form to initiate UUA search support (including the search team retreat programming, the facilitator's honorarium for the "Break Barriers, Build Beliefs" workshop, and the settled ministry start-up programming) by 01 June. The search team should provide its availability for retreat programming to the Congregational Transitions Director as soon as possible. Retreats should be held no later than the first week of September to give the team time to do its work in the fall.

Search Team Retreat Programming Leader

The Congregational Transitions Director will assign someone to lead the search team retreat programming once the search team shares its availability. Former ministerial settlement representatives and people currently serving as "Break Barriers, Build Beliefs" trainers, Hope for Us coaches, and UUA staff lead the retreats. Historically, these retreat leaders were called "transition coaches" or "ministerial settlement representatives," and had an on-going role with search teams. New laws covering consultant work in a few states, emerging and equitable consultant compensation policies at the UUA, and increased UUA staffing for transition support have necessitated a change in how volunteers support the search process. The retreat leader now leads only the programming of the search team retreat, and the UUA Transitions Team supports the search team through the remainder of its work.

Search team retreat leaders are paid an honorarium for their service to our UU search process (covered by the search support fee paid to the UUA by the congregation).

The Search Team Retreat/Orientation

Once the board has signed up for search support, the search team should provide possible dates for the retreat programming to the Congregational Transitions Director. She will share your team's availability with available retreat leaders and connect the search team with a retreat leader when she has a firm commitment. This can take a couple of weeks, so sharing the team's availability as early as possible helps. Ideally, the retreat is held by the end of August, though sometimes a date in early September is necessary.

Retreat programming generally takes 4-6 hours depending on the size and loquaciousness of your team and whether your group participated in the mid-June overview of the search process led by UUA staff. The retreat should be scheduled when all search team members can participate virtually or in person.

The retreat leader will offer programming virtually through Zoom. Search team members participating from individual locations is completely fine, and is, in some ways, easier for facilitation and accessibility. If your search team is gathering in-person for the programming, please be sure that you have a monitor of adequate size and a good camera and speakers to make the programming accessible to all participants.

True retreats for search teams were common years ago and are less common now. The search team is encouraged to spend some social or team-building time together around the time of the programming. No effort to build trust and relationships is wasted in the search process. Even if you do not decide to have a true retreat in a nearby retreat center, a state park, a hotel, a congregant's lake house, or any place where interactions are social and fun, you may gather for a meal or game night to celebrate the kickoff of your search and bond with each other.

Here are some ways the retreat programming can be arranged:

- 2-3 hours on a Friday night and 2-3 hours on a Saturday morning
- 4-6 hours on a Saturday with a meal break in the middle
- 2-3 weeknight sessions in a week of 1.5-2.5 hours
- A few hours each on consecutive weekdays

The retreat programming/orientation has four major goals:

1. To come together as a team, get to know one another better, and to learn about people's working styles and thoughts on the congregation and search process
2. To examine the tasks necessary for the search team's work on behalf of the congregation and choose roles
3. To begin work on a covenant about honoring the search process to serve both the congregation and Unitarian Universalism. This covenant is a living document, and you may add to it as the work unfolds
4. To begin to contemplate how the members will work together, make decisions, and support these decisions as a team

Specific discussion items pertinent to the last goal to be discussed at either the retreat or at an initial meeting with the search team following the retreat:

- Schedule—how often to meet, and how and when to meet (virtual meetings may be more inclusive for some people juggling work and care responsibilities)
- Expectations about what to share with the congregation and what is confidential
- How identity plays out on the search team, especially when people have identities that have historically been or may be marginalized

- How to incorporate the congregation, board, and interim minister into the work of search

Covenant

All engaged in the search process are asked to enter into a covenant of fair process with each other, our congregations, and Unitarian Universalism (included in the first section of this handbook). This requirement centers a key component of our Unitarian Universalist faith—the sacred promises we make to one another—in the vital work of ministry search.

The search team chair or their designee will review the covenant with the team, then enter into the covenant by indicating so on their congregational record. The search team may include a copy of their search team covenant, which is separate from the covenant in the congregational record, in their document packet.

Ministers also enter into a search covenant. Ministers in search who have not indicated so on their ministerial record on MinistrySearch will not have their name released to congregations.

The Work of Ministerial Search

The pieces of the search process are significant and extend beyond the search team.

The search team needs to decide who will hold certain roles and have oversight over certain tasks, such as:

1. Chair/convener
2. Communications
3. Treasurer
4. Website specialist
5. Survey coordinator
6. Cottage meetings/focus groups coordinator
7. “Break Barriers, Build Beliefs” coordinator
8. Congregational record coordinator
9. Documents packet assembler
10. Interview coordinator
11. Pre-candidating weekends coordinator
12. Hospitality arranger
13. References coordinator
14. Candidating week coordinator

15. Negotiating team member

A note to search teams: some of these items are easily bundled into a larger role. They are separated here so that the list of tasks and roles is clear. Each search team is free to combine and assign the roles in the way that works best for them.

A note to ministers: information here is also intended for you so that you can know what to expect from a search team and from the process.

Comprehensive Search Calendar:

This calendar covers the entire search process from the time a minister announces their plan for departure through the interim ministry and settled search until a new minister is called by a congregation. A more comprehensive description of the work of the settled ministry search team which is organized by roles follows in the next section.

Detailed Description of Search Team Tasks from a Role-Based Perspective:

Some of this information will be repeated in later sections of this handbook. This redundancy is by design, as we wanted to provide both role-based and chronological overviews of the work. This section is to help search team members choose their roles in alignment with their interests and availability.

Chair

The chair or convener of the search team monitors the work and progress of the search team, setting meeting agendas, communicating with the board and interim minister, facilitating meetings, and acting as liaison to the Congregational Transitions Director. The chair supports the work of the search team with their tasks, as needed, is seen as leader by the congregation and search team, and initiates (or is copied on) all communications with the Congregational Transitions Director and the UUA Transitions Team.

Some search teams have elected co-chairs.

Timing: *The task is ongoing throughout the search process.*

Communications

The communications person is responsible for recording decisions of the search team and for sharing information with leadership, the wider congregation, and ministers. The person with the communications role should share information with the website specialist or congregational administrator to be publicized to the congregation. Often, one person is the minute-taker and

decision-recorder for the group's internal records while someone else does the outward-facing pieces of the communication. Any minutes should be deleted and/or shredded at the end of the search process.

Timing: *The task is ongoing throughout the search process.*

Treasurer

Most often, this is the person on the search team who takes care of and maintains records of finances, making sure payments are made and that prospective ministers and search team members are reimbursed in a timely way. A separate checking account should be set up for the search team to maintain the confidentiality of pre-candidates' identities.

Timing: *The task is ongoing throughout the search process.*

Website Specialist

Note: This is a public task in many ways and may be filled by a person or persons not on the search team, such as a staff member or a communications volunteer. The communications coordinator(s) for the search team may take on this role, if desired.

The website specialist is responsible for oversight of the congregation's web presence during search. In addition to making sure the congregation's website and social media presence are up to date, the web specialist often creates a special section on the congregation's website specific to search. Content should include a photo of the search team with at least names and a short biography. The congregation's survey summary results are also highly recommended for inclusion here. Some congregations have made sure there are photos of the building and grounds, people in the congregation, even photos of or links to information about the wider community for prospective ministers to see. Creativity is encouraged, as the website is a marketing tool. One congregation had their youth group make a short video for the search to help break down the stereotype that the church was "full of only old and stuffy people." It may be helpful to congregants to include a calendar overview of the timing of the search. The documents packet may be shared here, as well, for both congregation and minister to see. Eventually, once the candidate is announced publicly, the web specialist can link to the minister's website.

Timing: *Much of this work happens in the first six months of the search process and even before the search team is formed. Though not necessarily a large task, it is an important one, especially for informing prospective ministers about the congregation for informing the congregation about the work of search.*

Key Dates:

- *Minister announces departure: First clean-up of website for accuracy and currency*

- *May-August: Search team members' photos and brief bios may be posted on the congregation's website. A group photo of the search team may be taken during the retreat and posted.*
- *Late October/early November: Survey results summary posted for congregation to see*
- *Early December or later: congregational record (whole or summary version) may be posted in a members-only part of the website or distributed to members via email*
- *When candidate is announced: post link to minister's website*

Congregational Survey Coordinator

The congregational survey is a real opportunity for the congregation to move toward a different future with a new minister. The UUA Transitions Team encourages the search team to collect basic demographic data from individuals and to ask ministry-related questions, emphasizing what the congregation needs more than what the individual completing the survey wants from a future ministry.

Before the search team begins the work of surveying and holding cottage meetings with the congregation, they should be sure to review all of the questions in the congregational record (including the questionnaire section). They need to be sure that they have a plan to learn what they need to learn before they represent the congregation to potential applicants.

Regional staff and the UUA Transitions Team, in partnership with ministers and colleagues in UU identity groups, have revised the congregational survey for the 2025 search cycle and beyond. We may update the survey slightly each year, based on feedback we receive from ministers and search teams. We intended to present an inclusive and thorough analysis tool, and we are open to making the necessary changes. *Please do not use surveys from before 2020 without carefully considering questions with an equity and inclusion lens.*

While your search team may start from scratch with a survey, we recommend that you consider using the survey we have generated, or as many parts of it as you can use or adapt, to assess your ministry context and needs. Upon request, the Congregational Transitions Director will make your search team's survey coordinator an administrator on a copy of the Google Form we use for the congregational survey. Your search team may use free add-ons to convert the survey to SurveyMonkey for familiar features and more robust data analysis if you wish.

Your search team may use outside help from the congregation in creating, sharing, and analyzing the results of the survey, especially if no one on the team has strong survey or data skills. Perhaps someone on the transition team could be involved. The team can make the survey design as easy as possible to analyze by including few, if any, open-ended questions. Many videos are available on-line related to survey design and data analysis.

Once the newly created survey is ready, a link to the survey should be sent to all congregants. Most search teams allow about a month for completion and submission for the survey, with repeated reminders sent throughout the month. A return rate of at least 50% should be the minimum goal, though ideally this will be higher. Once the survey is closed, survey results should be compiled, and the results shared with the congregation.

Often, the results can be used to spur conversation for cottage meetings and focus groups. The survey results should be shared with the interim minister and UUA Transitions Team. The survey will become part of the documents packet the search team prepares. Summary results may also be posted on the congregation's website.

If a congregation in a second year of search did a survey the previous year, the search team may elect to re-use the initial survey results.

Timing: *Fairly intense work over the summer through October*

Key Dates:

- *Summer: search team creates survey*
- *August-early October: Congregation completes survey*
- *Late September to Mid-October: Anonymized survey result summary shared with congregation and interim minister*
- *December: Survey summary included in search documents packet*

Cottage Meetings and Focus Groups

Surveys are not the only way to collect information about the congregation, though they are a good place to start.

Cottage meetings are open groups of congregants invited to come to a group conversation (generally facilitated by search team members) to provide an opportunity for people to hear and build on what others say. You may call these small group meetings what you like, as some search teams have noted that "cottage meeting" is not a familiar or useful term: sharing circles, small group discussions, etc. One memorable search team called their meetings "search parties" and publicized them by dressing for them in rain gear and carrying flashlights when making congregational announcements about them!

One search team found that in its cottage meetings, only three questions were necessary: "How would you describe this congregation to its prospective ministers? To prospective members? To a close, non-member friend?" Another search team used only two: "Looking back, after our minister has been with us a year, what will be your measures of success? What achievements will make you say you're glad the minister is among you?" Other potential good questions ask about the congregational culture and the ministers' role in the culture. One way to approach this is to ask people to reflect on the rules and customs they had to learn, both spoken and unspoken, as they joined the congregation. Follow that up with a question about what the new minister(s) should know about the congregational culture. If some discussion or long-form responses would help the search team with questions which could not be addressed easily in the survey, the small group meetings are a great opportunity to learn more. Ultimately, the search team takes the lead on determining the questions.

The meetings may be facilitated by a search team member or someone they designate. A search team member should take notes on what is said for later use. Good process of encouraging all to speak, letting people finish their thoughts without interruption, and setting

limits for individual speaking time is highly recommended, though a natural conversation in which people are sharing insights and generative thoughts should not be discouraged.

Multiple cottage meetings are encouraged, and search teams may implement sign-ups, meeting size limits, and meeting time limits to aid the process.

Focus groups differ from cottage meetings in that they are targeted at specific groups within the congregation. Typical focus groups have included parents, past presidents, youth, people of color, newer members, long-term members, staff (including the interim minister), retirees, previous search teams, and various committees and task forces, to name a few. The search team would do well to figure out which groups are likely to feel left out if not included.

Questions in focus groups can start in the same vein as cottage meetings, though some conversation time should be about the group invited to meet. Again, facilitation and note-taking should be handled by the search team, though delegation is an option here.

In an ideal search, both the cottage meetings and focus groups would be done after the survey results are compiled, so the survey can be used as a springboard for further group conversation. A short summary report of the cottage meetings (perhaps a page) should be included in the congregational documents packet. The report should talk briefly about how the process was approached and what key impressions were noticed or reinforced by the process. If information from the cottage meetings is included in the congregational record, it need not be duplicated in the summary report of the packet. But at a minimum, this is a chance for the search team to be transparent with ministers about how the information was gathered in the survey and cottage meetings, how many cottage meetings were held and where, which questions seemed important to ask, and any other information that sheds light on the processes.

Timing: *Usually done in the second year of interim ministry. This is a fall activity, best done after the survey has been completed, though timing may cause some overlap.*

Key Dates:

August: Dates set for cottage meetings, advertising begins

August-September: Focus groups decided upon, scheduling begins with dates, facilitators and notetakers identified

September-early November: Cottage meetings and focus group conversations

Mid-late November: Summary report prepared for congregational record and congregational documents packet

Break Barriers, Build Beliefs Workshop Coordinator

"Break Barriers, Build Beliefs" (B4) is a program that grew from the legacy of "Beyond Categorical Thinking" (BCT) program during the pandemic, incorporating learnings from the UUA's Commission on Institutional Change as published in [Widening the Circle of Concern](#) (June 2020). The BCT program began in the 1980s at the request of ministers who found bias and prejudice in the search process.

"Break Barriers, Build Beliefs" is designed to help congregations in the ministerial search process. Trainers from the UUA facilitate the weekend program. The workshop addresses issues around race/ethnicity, gender/gender identity, visible and invisible disabilities and health concerns, and sexual orientation. The UUA and applicant ministers expect that search teams will hold a B4 weekend, and applicant ministers should ask search teams what their congregations learned from the experience.

Congregational members, and leaders, particularly, are responsible for awareness of their personal implicit and overt biases and for countering systemic and personal biases during and beyond the interim period. All search team members, board members, and other people in church leadership should take part in the B4 workshop and strongly encourage all congregants to attend.

The three- to four-hour B4 workshop occurs on Zoom or in-person with a hybrid approach. There is an additional cost for an in-person workshop to cover travel and hospitality expenses for the trainer, but the cost of a virtual workshop or the trainer's honorarium for an in-person workshop is covered by the search support fee.

The program examines the current biases in our congregations and provides opportunities for congregation members to discuss what they would do if these biases occurred in their congregational setting. Search team members may invite the B4 trainer to lead the worship service during the B4 weekend ([the congregation should pay an honorarium](#), as with all guest speakers).

By completing the program, congregations send a message to all their members and potential applicant ministers about their commitment to full equality and ongoing learning about anti-racism, anti-oppression, and multiculturalism. A congregation is doing good work and moving toward transformation if it acknowledges and grasps the level of pervasive implicit and overt bias in its system and has committed, compassionately and actively, to challenging bias within the life of the congregation.

Application Process:

One person on the search team, the B4 coordinator, fills out the application (with help from staff and leaders). The search team should coordinate with the interim minister to identify available weekends for the programming. The search team will need to list a minimum of two weekend options on the application, though three is ideal. **Please submit applications no earlier than July 15.**

The UUA Transitions Team will assign a trainer or trainers, then make the initial introduction between trainers and search team B4 coordinators. *Identifying a trainer can take weeks, so UUA staff appreciate significant lead time with the application and patience.*

The search team B4 coordinator should check with their trainer about preferred workshop timing and schedule. A virtual workshop is typically held in two equal sessions—one on Friday night and one on Saturday morning/afternoon before Sunday worship. B4s that happen in person should be on Saturday morning or afternoon. The search team should schedule the workshop in person only when a four-hour block is available. Often, there is a meeting between the trainer(s) and the search team at some point during the weekend. Please check with your trainer about scheduling this.

The search team B4 coordinator will receive a link to a Dropbox folder that includes the handouts that need to be printed for the participants. There are also materials for children, if desired, as youth are encouraged to attend the workshop.

For more information, including the application to request a B4 workshop, please visit the "Break Barriers, Build Beliefs" section of our website. After the B4 weekend is finished, search teams should complete the evaluation.

Notes:

- The congregation should provide someone to set up the meeting space and a technical host.
- If the search team requests an in-person B4 workshop, the UUA will assess an added fee (separate from the search support fee) from the congregation and reimburse the facilitator for all travel and hospitality expenses. The fee structure and information about payment can be found on the application form.
- The search team should provide copy of the B4 application and a summary of what they learned about the congregation from the B4 to applicants in their documents packet.

Timing: *Scheduling should happen during the summer after July 15. The B4 workshop should happen anytime from late August to December.*

Key Dates:

July to October: Search team completes and submits B4 application

August-November: Search team and trainer(s) coordinate weekend

September-December: Training occurs

Congregational Record Coordinator

The congregational record (also called a CR, search profile, or application) is in the MinistrySearch system. It is the search team's opportunity to present itself to potential applicant ministers. All search team members have access to the content and questions of the congregational record, and the person(s) with the role of managing its completion should not be the sole responder to each question. Any search team member can input answers to questions, and multiple people may work on the record simultaneously. All search team members should have input into the final congregational record before it is submitted to for review and approval for publication. The coordinator may direct and remind team members to complete certain sections, seek out missing information, and/or conduct a final editing pass once the profile is complete.

The information in the congregational record comes from several sources. Some of it is pre-populated from the congregation's last certification to the UUA. If pre-populated information is incorrect, please notify the UUA Transitions Team. Information for some responses may come

from the survey, cottage meetings, and focus groups; some may come from the collective wisdom of the search team.

Once complete, the search team should invite the interim (or other transitional) minister and the congregation's UUA regional primary contact to offer feedback on the congregational record in mid-November. The Congregational Transitions Director may review the profile and offer feedback on behalf of regional staff if regional staff requests this, or, time-permitting, if the search team requests this. The interim minister and regional staff contact can suggest ways to balance the presentation of the congregation's unique strengths and challenges. The record should be submitted to reviewers for approval in time for them to read it and offer suggestions, and for edits to be completed before records are released to ministers at the beginning of December. Once the congregational record is publicly posted in this way, it should only be changed with the approval of the UUA Transitions Team.

Information from recent, previous searches in the MinistrySearch system will be available to the new search team who may (and probably will) change them. Search teams may email the UUA Transitions Team to request access to records created between 2000-2018, though the profile questions have changed and so has the congregation, so old records will likely be of limited usefulness.

Some notes:

- Creating the congregational record is not an exercise in putting your best foot forward. Search teams do the most good for future ministries by honestly describing the congregation, not by presenting a snapshot of the congregation at its best.
- Read all the questions in the congregational record before creating the survey or the question lists for cottage meetings. *Be sure to note that the questionnaire section is long!* Some search teams have discovered this late in their process, to their great dismay.
- The average length of a completed settled ministry search congregational record is 45-55 pages when viewed using the print/preview option in the MinistrySearch system to generate a PDF (this has a very large font!). We have seen profiles which are as short as 28 pages and as long as 113 pages.

Ministers like to do ministry. This means ministers like to know what reality will meet them once they begin serving and, therefore, what ministry the congregation needs. If something is conflicted within the congregation, the record should depict that. If something has been neglected, the record should say so. That said, every congregation has positive features which should be shared, as well. Ministers are interested in a balanced and nuanced view of your congregation.

The search team is encouraged to share the contents of the record with the congregation once approved and published. If elements of the congregational record might cause negative reactions in the congregation, please be in touch with the Congregational Transitions Director to strategize about framing or summarizing the record.

How to Complete and Publish the Congregational Record

[Visual Guide: Steps to Completing the Congregational Record](#) (this guide shows where buttons are, but the process below has been updated and is correct)

1. The search team will see the name and email address of the congregation's primary contact on the Congregational Life staff team (UUA regional field staff) in the profile. This is the person search teams will ask to review the profile before publication and potential applicants can contact to learn more about your ministry opportunity. **Please direct questions about the search process to the Congregational Transitions Director or UUA Transitions Team, not to regional staff.**
2. Regional staff and potential applicants access the congregational records in the search system, not through emailed documents. While you can download the questions from the search system for off-line reference, you should either work on your search profile in the system and save as you go or be prepared to do a lot of copying and pasting before requesting that regional staff review your profile. If you insist on working in a separate document, please make sure to clear formatting before pasting text into the search system to avoid unexpected formatting and save issues.
3. Fill out each section of the search profile/congregational record (CR), clicking each blue hyperlinked section on the MinistrySearch dashboard to complete it. Be sure to press the "Save" button at the bottom of each section before leaving a page, if you have made changes.
4. Once each section of the CR is complete with a checkbox next to the section title on the dashboard, and the search team feels that the CR is ready for review, click the large, pink "Complete Record" button at the bottom of the dashboard. *Clicking "Complete record" pushes your changes to the version of the document which regional staff (and, eventually, potential applicants) will see.*
5. Click the "Submit for Approval" button in the yellow box in the middle of the dashboard. The status will then show as "Awaiting Approval." This will allow regional staff, when asked to review the profile, to see the most current version of the profile in the MinistrySearch system.
6. The search team may generate a PDF of the CR (using print options) to share with the interim minister. Regional staff can access the CR through the MinistrySearch system, so a PDF is fine to send but not necessary. Ask your reviewers to offer feedback on your profile.
7. Once the profile has been reviewed and any changes made, please let the Congregational Transitions Director know that it is ready to be published.
8. Once approved, the CR is ready to go live on the jobs board. CRs for settled search are released manually to potential applicant ministers by UUA Transitions Team members in early December.

Timing: *Congregational records generally are filled out over the fall through mid-November.*

Key Dates:

Summer: Congregational record questions are reviewed by search team

Fall: Search team decides how and by whom questions will be completed

Mid to late November: Congregational record is completed and reviewed by entire search team. Feedback is sought from interim minister and/or the Congregational Life staff contact

Late November: Congregational record is shared with the Congregational Transitions Director for review and approval

First week of December: Approved congregational records are made available for prospective ministers to view

Documents Packet

While the congregational record is a series of questions, the congregational documents packet is a collection of documents. The documents will give applicant ministers concrete information from the congregation. One search team member should take the lead on this task. Because this is not confidential work, the search team can ask the board or staff for most of these materials. These documents or links to them should be collected into an online Dropbox, Google Drive folder, PDF file, or a collection of PDF files that can be shared with each applicant. If a document in the required list does not exist, please note this in your documents packet and don't worry about it. For example, if your staff does not have a covenant, the search team does not need to compel the staff to make one so it can be included!

The search team will share a link to the documents packet to all applicants as soon as their names are released to the search team the first week of January. *Make certain that the link you will share with each applicant is "view only" and will not list the applicants as people with access to the folder to preserve confidentiality.* If you are not sure how to do this, test your link before distributing it. You can find helpful guides to sharing view-only access links on-line. Search teams have reported that it is easier to assure confidentiality when sharing a Google Drive link than a Dropbox link. Most confidentiality issues with sharing documents packet links have happened with Dropbox.

Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox

Required documents:

- Proposed contract (also due to UUA Transitions Team by November 15th)
- Contract change form: how it differs from the recommended UUA/UUMA contract and whatever else you'd like the applicant to know, not needed if you track changes in the draft contract directly (also due to UUA Transitions Team by November 30)
- Total compensation breakout information/Compensation Worksheet (due to UUA Transitions Team by November 30)
- Biographies of search team members (if not on website)
- Congregational survey summary (and question set)
- Cottage meeting/focus group summary
- "Break Barriers, Build Beliefs" application and any reflections you took away from the weekend experience
- Congregational by-laws
- Policies if separate from by-laws (safe congregation, disruptive behavior, etc., if not on website). Here is info on safe congregation policies:
<https://www.uua.org/leaderlab/board-policy/what-is-safety-policy>

- Previous five years of congregational budgets and end-of-year reports
- Annual report
- Minutes from last three congregational meetings
- Minutes from governing board over last year
- Job descriptions for each staff member
- Covenant between interim minister and previous settled minister
- Congregational covenant
- Staff covenant
- List of ministers who have regular contact with congregants
- Several orders of service (include Christmas Eve, Easter, and other special holidays too, if possible)
- Copies of sample newsletters, email blasts, and other regular announcements that go to congregation

Optional documents:

- Longer report from survey and cottage meetings
- Search team covenant
- Timeline of congregational history
- Link to video tour of congregational building
- Year-to-year history of Governing Board members for last 20 years
- Sample information given to new members
- Current long-range plan (if it exists)
- Organizational chart
- Information given to parents on religious education/exploration opportunities
- Anything else the search team wishes to include

Timing: *These should be ready to be reviewed by the Congregational Transitions Director by mid-December*

Key Dates:

Summer/Fall: Search team agrees which documents to collect and share beyond required documents

By December: Documents are gathered and captured electronically for sharing

December: Documents packet is reviewed by Congregational Transitions Director

January: Documents packet is distributed to each applicant whose name was sent to the search team

Interviews with Prospective Ministers

The search team will hold interviews at two separate times with prospective ministers. The first set is usually done by video conference call after the search team has looked at all applicants and decided whom they would like to pursue further with an interview (mid-January). Generally, these interviews last about an hour, with at least 15 minutes for questions from the applicants. The second set of interviews happens over the course of the pre-candidating weekend (February-March). Generally, the whole team has a three-hour interview with the pre-candidate on Saturday and then a follow-up conversation/interview on Sunday at lunch.

The search team can appoint a person to oversee the interview process. Quite often, the chair does this (though it does not have to be the chair) or the search team does this as a group.

Video interviews should be done when all search team members can participate. On occasion, when this is not possible, the session could be recorded, with the ministers' prior knowledge and consent and shared with the missing team member.

Pre-candidating weekends (in February and March) should only be scheduled when all search team members can participate.

Interview questions should be standardized so that all interviewees are asked the same set of baseline questions. Additional questions specific to interviewees and their materials are fine, but the framework should be the same for all interviewees. It is important for search team members to remember that the questions they ask give information to prospective ministers about the values of the person asking and may also reflect the values of the search team and congregation. It's important for a search team to notice which questions they are asked by prospective ministers.

Search teams are encouraged to tell ministers they wish to interview the structure for the interview in each setting. Questions can be given to ministers in advance, if the search team wishes, provided this is done consistently for all interviewees.

Soon after each interview is over, the search team should take some time for a debrief of the interview. Both search team and prospective ministers may circle back with follow-up questions should the need arise (usually via email).

Sample questions for search teams and ministers are in the Appendix.

Timing: *The search team should decide how it will conduct these interviews before extending any invitation to interview.*

Key Dates:

December: the search team may hold a mock interview with the interim minister and should reserve some time in January for interviews

December-early January: Search team chooses questions for each interview

Mid-to-late January: Interviews are held

Before first pre-candidating weekend: Search team chooses questions for each pre-candidating weekend

February and March: Pre-candidating weekends are held

Pre-candidating Weekends

Pre-candidating weekends are the opportunity for the pre-candidates to meet with the search team. One person may organize the weekends, though hospitality may be covered by other members (and is covered in the next sections).

All search team members should be present for each weekend (search team members should reserve three weekends in February and March for this). Usually, the prospective minister(s) arrives on Friday. Components of the weekend include a tour of the congregational building (at a time when no one is around), a social dinner gathering, a three-hour interview, a tour of the area, a vespers-style service with just the minister and search team, and a final lunch discussion/interview. Prospective ministers may meet with the current interim minister, other ministers on staff, and affiliated ministers, if they like. It is not recommended that other staff meet with pre-candidates as they are not bound by UU Ministry Association professional guidelines or the covenant for fair practices/confidentiality in search.

Ministers' spouses should be welcome for the pre-candidating weekend with costs covered by the search team budget, though this is ultimately a decision between the minister and spouse. Children's expenses are not covered by the search team budget for pre-candidating visits, and, if possible, the minister's children should not come for pre-candidating weekends. Spouses are often part of the "sell" for a minister and often need to experience the area for both family and employment possibility reasons.

The search team should first decide on how many pre-candidates to see. Most congregations decide on three pre-candidates, though four is not out of the question. Occasionally, a congregation wants to consider fewer pre-candidates, though that can be risky since ministers are looking at multiple congregations, too.

Inviting Pre-candidates

Once the search team has confirmed their pre-candidates (on or after 24 January), they should ask pre-candidates which weekends in February and March they could be free and schedule the weekends accordingly.

Sample Pre-Candidating Weekend Schedule

- Minister arrives Friday

- Meeting with interim minister (optional) at a neutral site
- Tour of congregation (at a time when the building is vacant)
- Friday dinner: time to get to know one another
- Three-hour interview on Saturday morning at a private site, often someone's living room with their spouse and family gone
- Tour of area
- Vespers-style service with search team
- Don't forget to build in some free time for each pre-candidate!
- Final breakfast, brunch, or lunch and follow-up with search team

Pre-candidate spouses are welcome at all events except the interview and meals in an interview-type setting.

Scheduling the tour can be problematic if the building is in constant use. Some search teams have simply reserved the building for an hour to ensure privacy. The tour of the area may be done by one or two search team members. The coordinator of this should work closely with the hospitality person to assure a cohesive and productive weekend.

Often, other meals like Saturday lunch and dinner are also with the search team. The spouse should be welcome at all events except the interview and final lunch (though a separate table is completely fine).

Virtual Pre-candidating

The UUA Transitions Team has gathered tips from search teams who conducted pre-candidating weekends virtually during 2020 and 2021 (the lockdown period of the COVID-19 pandemic). They were often spread out over a longer weekend (Thursday-Monday, for example). Each of the weekends should be as consistent with others as possible; for example, if a search team hosts one pre-candidating weekend virtually, all their weekends should be held virtually. This is to ensure fairness in the interview process and to ensure that each pre-candidate has access to the same amount of the search team's time, attention, and resources. Any virtual schedule should come from mutual agreement between the search team and the minister.

A tour of the church building can be done effectively via video. One search team did a live tour in a video meeting and the pre-candidate was able to ask questions. A search team could do a virtual building tour, regardless of pre-candidating plans, and include it in their documents packet ahead of time.

Interviews—usually, these are held on Saturday mornings in-person and last three hours. Search teams and ministers seemed to prefer spreading this out over a couple of days during virtual pre-candidating, which is definitely an option.

Tours of the area—you might check your chamber of commerce, ask a local realtor (not in the congregation), or create your own virtual tour.

Timing: Pre-candidating weekends should be scheduled earlier in the process before search team members' calendars get full, often by the end of the summer or early fall. Finding a time for a tour of the congregational building and for interviews can happen later.

Key Dates:

Summer: Search team identifies weekends in February and March when all can be present

Fall-early winter: Congregational building tour time scheduled

January: Site for three-hour interviews set; pre-candidate invitations and scheduling with potential pre-candidates made

Hospitality

The search team is responsible for hosting pre-candidates and the candidate during the search process. Travel arrangements, housing, and transportation on-site are all issues to consider. Usually, one person acts as hospitality coordinator.

Spouses are welcome along with pre-candidates. Families are welcome for all or part of candidating week.

Pre-candidates may either book their own travel or let the search team do this. Pre-candidates making their own arrangements should be frugal with what is ultimately the search team's budget. Search teams making arrangements for pre-candidates should allow for a reasonable travel day. Either party should get the approval of the other before a final booking. If the pre-candidate is driving, [standard government reimbursement rates](#) for mileage apply.

Lodging for the visit should be arranged by the search team, ideally in a reasonably priced hotel which is convenient for the weekend and in a location that allows the visitors to experience the city. The latter is especially true if the spouse/family comes. A pre-candidate or candidate should never be lodged in a member's free room, empty house, or place of business.

The hospitality coordinator will be responsible for transporting the visitors. This includes airport pick-up (or reimbursement for taxi or rental car) and transporting the pre-candidate to the various meetings. Often, the search team splits up transportation so that members have solo or paired time with the pre-candidate.

If the minister has expenses to be reimbursed, these expenses should be repaid in a timely manner.

All of the above is also true for the ministerial candidate and their family, though a rental car for the week is a worthy expense, as often the minister and family are exploring places to live in their free time and learning about the community on their own.

Timing: Lodging arrangements generally do not have to be prepaid, so lodging arrangements can be set up as soon as pre-candidating weeks are arranged. Other arrangements should be made as soon as the pre-candidate commits to a weekend visit.

Key Dates:

Fall: Lodging arrangements secured once pre-candidating weekends are set

Mid-to-late January: Travel arrangements made as soon as pre-candidate accepts

A couple of weeks before the pre-candidating weekends: Search team should finalize local transportation for the pre-candidate (and spouse)

References and Research Calls Coordinator

References and reference checking are an important part of the search process. The search team usually has one person coordinating reference checks and several people working with that person. There are two to three phases of reference checks in the ministerial search process for search teams. References are the opportunity for confirmation of how ministers depict themselves and for the search team to ask their own questions from their own perspectives. Ministers also do their own research by talking with interim ministers, regional staff, and previously settled ministers. What both search teams and ministers are seeking is congruency. Do congregations or ministers present themselves consistently with how others describe them? Without doing reference checks and research calls, you will never know.

When to Do Reference Checks

<i>Initial reference checks</i>	<i>Those provided by ministers</i>	<i>January, after getting applications</i>
<i>Developed reference checks and research calls to UUA regional staff</i>	<i>Done once pre-candidates have been confirmed</i>	<i>February-March</i>
<i>Candidate reference checks (optional and somewhat rare)</i>	<i>Done once a candidate has accepted offer</i>	<i>Between acceptance of offer and candidating week</i>

Initial Reference Check

The initial reference check can occur as soon after getting the ministerial records as the search team would like. Some search teams want to do them immediately while others wait until after the first interview. Once a search team has received access to ministerial records, they may then ask the minister directly for an initial set of references of the minister's choosing. A list of sample questions for these references can be found in the forms section and appendix. These calls may be done over the phone, video, or via email. It is recommended for phone and video interviews that, if possible, two search team members conduct the reference check. The

reference checks at this juncture are often done as the search team moves toward selecting pre-candidates, though they can be done earlier if the search team needs additional information to decide on initial interviews. In general, to respect people's time, 30 minutes should be the maximum allotment for this conversation.

While a minister may be a reference for more than one minister, a search team should not ask a minister to compare ministers for whom they are the references. No minister should offer this either. If a minister offers a comparison, the search team should ask the minister to speak only directly about the skills of the applicant without comparison.

Search teams should not ask ministers who are not named as a reference for advice in any way about applicant, pre-candidate, or candidate ministers as a minister who responds to such a request could be considered in breach of UU Ministers Association guidelines.

Current employees of a prospective minister's congregation should not be asked to provide references for applicant ministers. To avoid putting any employee in a complicated spot by even having to be asked about (let alone provide a reference for) someone who has power over them, we encourage ministers to use former employees as references. For newer ministers, this might involve a previous career.

The search team may only reach out to references provided by an applicant minister to preserve confidentiality about the minister's search.

Developed Reference Checks/Research Calls

Once the search team has selected its pre-candidates, a second round of reference checks is strongly suggested. These go beyond references the ministers recommend themselves, though it is essential to get the minister's consent to speak with developed references before contact.

The search team could and should now ask to speak to:

(1) someone in the ministers' current congregation or congregation last served. If this is a ministerial internship, the search team should speak to the supervising minister and/or someone on the internship committee. It is imperative to take great care to be mindful of the need for confidentiality. If a minister is currently serving a congregation, their search for a new ministry may not be public to the congregation. Yet every searching minister should be able to identify one trusted leader in their current congregation who can both be a good reference and keep confidentiality.

(2) Additionally, the search team should set up Research Calls with UUA Staff with a UUA regional staff person (CUC, if Canadian) to learn more about pre-candidates. These are not reference calls, as UUA staff does not provide references for ministers. Regional staff are keen to share what they know about pre-candidate ministers to help your search team look for congruency and find a great match. The search team should ask the minister which staff person knows their ministry best before contacting a regional staff person. If the minister cannot connect the search team with a regional staff person, the search team may reach out to the

Congregational Transitions Director to ask if anyone on staff is familiar with the ministry of the pre-candidate.

(3) Another developed reference option is based on the search team's desire for deeper clarity about a pre-candidate. For example, the search team may have some questions about the minister's involvement in staff supervision, anti-racism work, conflict-transformation, or trust building work, to name a few examples. The pre-candidate could then be asked by the search team, "For a developed reference, we'd like to talk to someone of your choosing who could tell us about your work around conflict. Whom could we contact about this?" The search team is free to ask other questions of these developed references, too.

Current employees of a prospective minister's congregation should not be asked to provide references for pre-candidates. To avoid putting any employee in a complicated spot by even having to be asked about (let alone provide a reference for) someone who has power over them, we encourage ministers to use former employees as references. For newer ministers, this might involve a previous career.

Again, these reference checks may be done via phone, video, or email. Timing should not exceed 30 minutes. While there is no limit on the total number of developed references allowed, most congregations do two to four checks.

Reference questions should be fairly consistent across the board. Search teams should remember that references often tell the prospective minister not only that they were contacted but also what they were asked and how the conversation went.

Candidate Reference Check

Once a search team has matched with a candidate, they have the option to ask the candidate for additional references within the current congregation or workplace where the minister is serving. This final stage of reference-checking is rarely used, but a search team may feel the need to do its due diligence as it prepares for candidating week. These references should be approved by the candidate, though asking for people who will have differing opinions on the previous ministry is a reasonable request.

Timing: *January through early April*

Key Dates:

January: Initial reference check

February-March: Developed reference check and UUA research calls

April: Candidate reference check

Candidating Week Coordinator

Candidating week is the opportunity for the congregation to meet the ministerial candidate. The congregation has put a lot of trust in the work of the search team and is still looking to the search team for leadership.

The UUA Transitions Team shares three possible models and sample schedules for candidating weeks in the section on phase seven of the search process in this handbook. The primary model is less centered on meeting and greeting committees and more about simply getting to know one another, building trust, and looking toward a new future. The second is the traditional, pre-pandemic model; the last is a virtual model. We trust search teams in partnership with the candidate to figure out what makes most sense for everyone.

In all models, the search team manages the week to make sure things run as smoothly as possible, setting up a reasonable schedule that allows for the congregation to interact with and vote on the candidate. Usually, one person from the search team manages the planning and schedule for the week, and all search team members take leadership roles during the week. While hospitality should have previously been arranged for lodging and transportation if the week is to happen in person, the point person for the candidating week manages the schedule and coordinates with the search team, candidate, congregational leadership, congregation, and area ministers.

During the candidating week, the candidate(s) typically leads services on both Sundays. At least one congregation-wide open session with the candidate should be scheduled. Meetings with staff (often as a group, then with individuals) are expected, as well as a meeting with the governing board. On Friday before the vote, a short check-in is highly recommended between the candidate and the search team to talk about how things have gone during the week. Other meetings with affinity groups, task forces, and committees are recommended during the week, as is a meeting with area clergy.

The interim minister and candidate can meet during the week and should discuss ahead of time any looming pastoral emergencies or other pieces of information the candidate would need to know. During the week, the candidate is the go-to minister for the congregation should something arise.

There should be at least one day off during the week, as well as time off each day for restoration and home search. The schedule should be mutually approved by the search team and the candidate.

The search team should be a guide/host at congregational events, but other members of the congregation may assist with planning and execution of plans significantly. Meetings with staff and area clergy are generally left to the candidate, though this has varied from congregation to congregation.

The search team should also remember that members of the congregation are noticing the search team and their enthusiasm at the same time they are meeting the candidate. Trust in the search team is still a key factor at this stage.

Timing: *Most of this happens in the spring, other than setting the dates for candidating week.*

Key Dates:

Late Summer: Search team meets with interim minister to reserve candidating week (usually last week of April to early May)

March-April: Search team organizes candidating week in conjunction with candidate

Candidating week: Search team members act as hosts/guides during the week

Process Observations

Most search teams would like to make sure that meetings go as well as possible. Process observation is a great way to assess and monitor how meeting time is being used and how team members are in relationship with one another. Some teams ask one person to do this, while others rotate the role between all members. Another way to approach this is to have a process observation checkout at the end of the meeting when everyone can reflect on whether what was proposed to be accomplished in the meeting was accomplished, whether all people had the opportunity to speak and feel heard, whether the decisions made were agreeable to all (can they live with the decisions and abide by them?), and whether the group stayed in covenant with each other. Former UUA Regional Lead Rev. Dr. Ian Evison wrote a [process observation guide](#) that may be a useful resource here.

Historically, meetings have become complicated when:

1. One person dominates the conversation.
2. People are cut off or feel unheard.
3. Disagreements are not seen as learning opportunities for all.
4. One person on the search team is the only person of an identity (age, gender identity, race/ethnicity/sexual orientation, for example) and the search team tries to ignore or downplay the identity or expects the person to represent everyone from their identity group. In other words, one person is seen as the problem as opposed to the team realizing it has an identity-based issue to work through.
5. People passively hold back concerns.

Timing: Ongoing

Negotiating Team Member

The governing board appoints a negotiating team to prepare a draft of the ministry agreement into which the congregation and minister will eventually enter. The negotiating team may also be asked to recommend compensation (salary, housing, benefits) to the board, though ultimately the governing board is responsible for setting compensation.

Shortly after the search team is selected, the board should appoint a negotiating team, consisting of no more than three people, including at least one search team member (selected by the search team), one board member, and one other person (selected by the governing board).

The team's purpose is to develop for board approval a draft ministry agreement that reflects the relationship the congregation hopes to have with the minister it will call, and then to negotiate that agreement with the ministerial candidate.

The team should consult with the board to achieve a clear understanding of the compensation amount set by the board and the plan for negotiating a final agreement. The team will submit a draft worksheet of the breakouts for total compensation for the documents packet.

The draft agreement should be based on the recommended joint UUA/UUMA contract.

In addition to preparing a draft agreement, the negotiating team should fill out the contract change form listing all changes made from the UUA/UUMA recommended contract or simply track changes in the draft document itself. Changes should be made in a spirit of trust and generosity, if possible, as ministers pay close attention to these changes and what they might signal about the congregation.

Both documents should be submitted to the UUA Transitions Team in November, before congregational records are due.

The board, for its part, should be prepared to support any ministry agreement negotiated within its understanding with the negotiating team. The draft agreement should be included in the documents packet prepared by the search team and discussed with each pre-candidate, with notes made on the response of each. It is not necessary at this point to resolve any differences, only to acknowledge that they exist and will need to be resolved if this person is to be chosen as the candidate.

Members of the negotiating team who are not on the search team should not meet with the pre-candidates, though they should be apprised (without mentioning names) of significant differences and "deal-breakers" which should be addressed before the candidacy is offered.

Once the verbal offer to a candidate has been accepted, the negotiating team and the candidate meet to finalize the contract and compensation. Once an agreement is reached, the contract may be signed by fax, or be signed at the end of candidating week. The contract may include the phrase, "upon successful congregational call vote" if signed before the candidating week vote.

The search team should not announce the candidate to the congregation until there is mutual agreement on the contract and compensation, the candidate clears the search team to make the announcement (they may have to announce to their current congregation that they are leaving), and a criminal background check is initiated.

Timing: Fall for generating draft agreement and first week of April for contract negotiation

Key Dates:

By late September, the Negotiating Team should be selected.

By the end of October: Negotiating team convenes to examine contract and compensation and make recommendations on both to the governing board. It is highly recommended the negotiating team meet with the person who administers benefits to understand what is offered, and how things are administered.

By November 15th, the search team will have received the draft contract from the negotiating team and submitted this to the UUA Transitions Team.

By the end of November, the search team will submit the compensation calculation worksheet to the UUA Transitions Team.

The member of the search team and the negotiating team will often act as the go between, anonymously sharing questions and concerns raised by applicants and pre-candidates.

Offer Day 12:01 PM EDT until complete: negotiating team may begin contract and compensation negotiations with candidate—though the negotiating team is expected to keep the identity/name of the candidate confidential until it is publicly shared with the congregation by the search team.

FAQs

Why does the UUA update compensation guidelines in the fall? Do we have to scramble to raise out compensation package if the UUA's recommendations go up to adjust for increasing cost of living?

*Our Office of Church Staff Finances receives updated information about cost of living in the fall and updates our salary recommendations accordingly. If your geo index (cost of living category) changes or the salary recommendation goes up while the negotiating team and board is working on the draft agreement, your search team does not need to panic! It's good to be aware that cost of living is going up in your area (as you are likely aware!) and to try to align with UUA recommendations, but if there is a significant change, applicant ministers know that it will take time for congregations to align with new standards. Perhaps you can reduce your range for negotiation so you can have a higher starting salary. We only ask for the low-end figure in your salary range to be advertised in your search materials. **Do your sustainable best.** If you want to offer some explanation for your salary and benefits package, you may do so in the text field in the relevant of the congregational record.*

We searched last year and are in search again this year. Which parts of the process do we need to repeat and what do we not need to repeat?

You need not redo the survey. You might consider doing a couple of updated cottage meetings to determine where the congregation is now and reflect on how accurate the data from the survey still is. Most congregations do not repeat "Break Barriers, Build Beliefs" unless it has

been more than two years since they did this or if there were extenuating circumstances that indicate that re-doing this is a good idea. The congregational record and documents packet should be updated, as needed, depending upon what has transpired in a year.

Can we give welcome baskets to our pre-candidates?

Reluctantly, yes, though a search team should not feel obligated to do this and the UUA Transitions Team discourages this. If anything, welcome brochures of local attractions and information about the area are the most appropriate offering. Regardless, search teams should be consistent if they offer anything. We had one congregation offer more to one favored pre-candidate than the other two, not knowing that the two of the pre-candidates were close friends.

How can ministers do research on congregations?

Ministers in search are encouraged to reach out to the current interim minister, previous ministers who served the congregations, and, if named a pre-candidate, they should reach out to the UUA regional staff who serve that congregation. Ministers should not reach out to members or staff of the congregation. Indeed, a good question for a search team to ask a minister in an interview is to whom the minister has talked about their congregation (this is a way to gauge interest).

What else should ministers do to prepare for search?

Ministers should do an internet search of themselves. Know what's going to be found out about you to avoid surprises.

Talk to ministers who've been in search recently.

Figure out your finances and know what you can afford. Do your research about the congregations in search.

How can ministers learn about the cost-of-living and housing market in areas where they would like to apply?

The Best Places website is extremely useful: <https://www.bestplaces.net/>.

Can we see another congregation's congregational record as an example?

If you ask on your own directly to another congregation, you can.

What's the most common mistake ministers make in their ministerial record as they prepare for search?

They don't present themselves as ministers--they present as academics and consultants. Tell stories of how you do ministry.

What's the most common mistake congregations make in their congregational record as they prepare for search?

In an effort to make themselves more attractive, they only put their best foot forward, thinking of the congregational record as more of a resume than an authentic presentation of the ministry that's needed by the congregation. It's far better to say, "As a congregation, we have different opinions on growth. Some people are adamant about wanting the congregation to be their sanctuary from the world while others see that our future is beyond our walls" than to say, "We want to grow." "The congregation is still conflicted about Rev. Jess Smith's ministry," is better to say than to say nothing at all about a hard ending. Conversely, a congregation can be too negative about itself and cause ministers to miss what the congregation has to offer. Balance and authenticity are prized in search.

There used to be "neutral pulpits" as part of the search process. What happened to those?

Until the 2025 search cycle, neutral pulpits were part of the settled search process. For a neutral pulpit, the search team would schedule guest speaking opportunities in the fall for their pre-candidates, then have the opportunity to watch them preach live in an area congregation during pre-candidating visits in the February and March. There were challenges with finding three congregations of the same size and maybe even liturgical style within easy driving distance where the pre-candidate had no connections and where confidentiality could be assured, especially since live-streaming is so common now. Search teams which reserved more neutral pulpits in the fall than they needed in the spring were responsible for filling the unused pulpit, which caused great frustration and stress. Ministers now almost assuredly have videos of their sermons to share with search teams. The complexity of arranging neutral pulpits and assuring confidentiality around them began to outweigh the benefit, so the UUA eliminated the recommendation for neutral pulpits in the 2025 settled search. Instead, we recommend that ministers lead a vespers-style service for the search teams with whom they pre-candidate. Doing so provides a search team with a perspective on the minister they would not likely be able to gain in any other way.

Why does the survey template ask about congregants' finances? This feels intrusive.

Since the survey is anonymous, UUA staff hasn't heard about much pushback on including financial information. Ministers want socio-economic information to help them understand the congregation's context. For example, there was one congregation in search recently with mainly extraordinarily wealthy congregants...and yet they struggle to fund their budget every year and are not offering fair compensation to all staff members. The first thing they do when they think they have a deficit budget is to cut staffing. This gave applicants something to consider about the culture of the congregation. A minister with experience nurturing a culture of generosity could do well there. A congregation which has a mix of working-class and wealthy members has

interesting diversity and may have done some good cultural work around inclusion (or perhaps control and influence are held in a less favorable way).

How many congregations find a match in the settled ministry search process each year?

In the last several years, the average has been 80-90%.

Calendar

Search team retreat with UUA volunteer retreat leader	Summer at end of first year of interim ministry
"Break Barriers, Build Beliefs/B4" application	July-September
"Break Barriers, Build Beliefs /B4" workshop	September-December
Congregational survey	August-early October
Negotiating team selected	August-September
Cottage meetings/focus groups	September-early November
Negotiating team recommends contract and compensation to board (informed by review of the Employer's Participation Agreement on file with the UU Retirement Plan)	October-November
Congregational record/search profile	finished by mid-November
Proposed contract and contract change form	Due to UUA Transitions Team by Nov 30
Compensation worksheet	Due to UUA Transitions Team by Nov 30
Congregational record released	if approved, December 1
Documents packet	finished by mid-December

Forms and Links

- [Settled search calendar](#)
- [Congregational Covenant](#)
- [Ministerial Covenant](#)
- ["Break Barriers, Build Beliefs" \(B4\) program information](#)
- [Blank Ministerial Record](#)
- [Visual Guide: Steps to Completing the Congregational Record](#)
- [A Guide to Process Observation \(from UU Regional Lead Rev. Dr. Ian Evison\)](#)
- [Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries \(Word\)](#)
- [Contract Change Form](#)
- [Compensation Worksheet](#)

MinistrySearch System

Once the search team members have been entered in the MinistrySearch system after June 20th, each person should tour the system to gain familiarity with the dashboard and the congregational record questions (especially the lengthy questionnaire section). Some responses will be automatically filled from data provided yearly to the UUA for membership certification (staffing, membership, and finance information)

Some responses are also carried over from interim search questions and are there for informational purposes; the search team is free to alter the responses to these questions.

Initially reviewing the questions can help the search team frame the information needed for presentation to potential ministerial applicants. Reviewing the questions as a group may also help the search team form questions and discussion items for the survey and cottage meetings.

While the search team may begin filling out the congregational record as soon as it wishes, most wait until after the completion of the survey and cottage meetings to give more informed responses.

Multiple search team members can view the congregational record simultaneously, but we caution folks against editing simultaneously as you run the risk of saving over each other's edits. More information about this can be found in the [Visual Guide: Steps to Completing the Congregational Record](#).

The entire record should be complete by mid-November.

Discussion Prompts

How much can we afford?

Congregations struggle with budgeting, fair compensation, and trying to make an attractive offer which is financially sound. Our UUA currently uses a geo index scale to show the fair compensation ranges for congregations of different sizes in areas with different costs of living. From this geo index scale, congregations can determine a range for salary and housing (housing is taxed differently for ministers). Check on your congregation's [geo index scale and salary recommendations](#). What is the range recommended for your congregation? Are you currently compensating fairly? If you are below the minimum, the search for ministry gets more complicated. If you stretch to meet UUA compensation standards, or stretch to be at mid-point, is this sustainable beyond a year? How much responsibility will you put on the minister to "sing for their supper?" Does your congregation adequately pay everyone on staff or prioritize the minister's compensation (please do NOT!)?

And then there are all the benefits! As a search team, do you know which benefits you should give and what you currently offer? Benefits often cost approximately 40% of the salary and housing amount. Ministers have saved congregations money by not taking benefits (the settled minister can get on their spouse's medical plan, for example). All too many congregations have

found this solution to be a budget relief temporarily, only to be surprised when the minister leaves and the congregation must find the money for health insurance for future ministers. It's a short-term fix that becomes an immediate problem during the next search. This should not be the future minister's problem.

What are the financial issues with which you need to wrestle as a congregation to support ministry? What can you reasonably afford? Check in with a [UUA Compensation Consultant](#) for help in thinking through these issues.

Theology on Survey

Is it more important to know what an individual's theology is on the survey or to have people reflect on what it means to be a multi-theological congregation? It used to be that one of the gifts of the survey was that the congregation learned it was more diverse theologically than it thought. Does the minister(s) need to state their theology or does the congregation know that whoever becomes the candidate will need to minister to people with a range of theologies?

"Break Barriers, Build Belief"

Why would a congregation need to do this workshop if it has earned the Welcoming Congregation designation, has celebrated Pride every year for nearly two decades, has a Black Lives Matter banner, has held educational programs on race and racism, has an accessible meeting space, and has members from historically marginalized groups (People of Color, LGBTQ+, people with disabilities, etc.)?

Consensus versus Majority

Search teams often find the question of how to make decisions challenging. Simple majority or consensus? On the one hand, majority voting is quicker, though it can leave people divided. On the other, consensus takes longer and can be confusing. Does everyone have to have the same opinion or does everyone agree to support the decision even if it isn't their preferred option?

In the beginning, some decisions are easier. Yet let's look at how this can get complicated:

The search team is trying to decide on how to prioritize their ministerial options. They decided to go with a letter grade system for their final three pre-candidates.

	S.C. <i>member</i>	S.C. <i>member</i>	S.C. <i>member</i>	S.C. <i>member</i>	S.C. <i>member</i>	S.C. <i>member</i>	S.C. <i>member</i>
<i>Precandidate AZ</i>	A	A-	C-	B+	A	A-	A-
<i>Precandidate BY</i>	B+	B+	A-	B+	B	B+	B
<i>Precandidate CX</i>	A	A+	A+	B-	B-	B-	A+

How would you recommend the above search team rank order its pre-candidates?

And how can your search team get to a place where everyone agrees to support all decisions, even ones that are not their preferred choice?

When there's only one person...

A dynamic on the search team can happen when there is one person on the team who holds an identity different from the rest of the team. In the past when this has happened, there have been complaints of "They don't listen to me because I'm so much younger," and, "My opinion seems to matter less, and I'm experiencing micro-aggressions around race." What can a search team do to make sure that people, their identities, and thoughts aren't marginalized and that all people and opinions are valued?

Phase Four: Opening the Search

Background Information to Improve the Odds of Better Decision Making

In theory, the hard work is done. Really, the preparation is done, and now comes the piece of mutual discernment.

It is very easy for both search teams and ministers to forget this is a mutual discernment process and that both parties are on timelines. One of the more common errors, at this point, is for the minister or search team to assume that the congregation or minister is looking for only them. Another common error is to rush through the process and assume that the first interest is their best interest while discounting other options. Some search teams are so fearful of getting no minister that they struggle to find a minister who can serve them well. Some ministers do the same. One pre-candidate reported one year that a search team was so enamored with the first pre-candidate it had seen the week before, that the team spent more time talking about the other pre-candidate than they did to them during this pre-candidating weekend.

Opening the search means all of that hard work is about to be put on display. All feel excited, vulnerable, and hopeful. It's a key moment for the Congregational Transitions Director to work with search teams and for ministers' colleagues to be present to ministers. It is important to acknowledge this moment, appreciate all the hard work that has been done so far, and shift from preparation to mutual discernment.

In some ways, this is the last moment before time really crunches (even when it feels like it doesn't) for all involved. Deadlines have become a part of the process in a very significant way now and they exist to promote fairness for all.

Key Elements

Review of Congregational Record

Once the congregational record is finished, the search team should solicit feedback on the record from the interim minister and regional staff. The interim and regional staff are likely to be asked about your congregation's ministry needs by ministers during the search process, and they are aware of the congregation's history and patterns in unique ways. They can be helpful to the search team in reflecting on the congregation's unique strengths and challenges in the congregational record. They may ask questions or suggest clarifications, but do not have generally have the ability to delay the release of the record.

Once the interim minister and regional staff have provided feedback on the congregational record, and the search team makes any adjustments they would like to make, based on that feedback, the search team should let the Congregational Transitions Director know the record is ready for her review and publication. Reviewed and approved records are made visible to searching ministers in the first days of December (see [calendar](#) for exact dates).

The congregational record may be shared with the congregation *once it is published* if the search team so chooses. If there is something in the CR which could be upsetting or triggering for congregation members to review or relive, the team could issue a summary version of the CR which focuses on expectations of the minister and the congregation's needs and hopes. Be sure to promote the understanding that the record was informed by broad congregational input and is not open for individual editorial input.

Changes to the congregational record may not be made after publication without the approval of the UUA Transitions Team.

Review of Ministerial Record

While there is no official approval process for ministerial records, searching ministers would do well to have several trusted colleagues review their record before release for edits, suggestions, and questions. They should ensure that links work as expected. The most common errors noted by search teams are grammatical or spelling errors and mentions of the “wrong” type of ministry search (when a minister applied for another type of ministry and did not adjust the description of the type of ministry they are seeking before the current application). Search teams should know that ministers only have one ministerial record and may be applying across different types of ministry.

While searching ministers may indicate interest in the MinistrySearch system for a congregation while their ministerial record is still incomplete, ministerial records should be finalized in the system and ready to be made public by January 1st, the day before release. The UUA Transitions Team will not release names to congregations if ministerial records are not finalized—the reason for this is that congregations will be able to see the name but not read the record. Please email transitions@uua.org with any questions about finalizing the ministerial record.

The timing of the congregational record release and the release of interested ministers' names to congregations gives ministers one month to review records and research congregations. Research may include talking with the interim minister and previous ministers to the congregation. Searching ministers are strongly encouraged to read all congregational records, even those they have no interest in serving. Other congregational records can give insight into information that is or is not present in the records of the congregations in which the minister is interested.

[Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)

Review of Documents Packet and Scheduling of Discernment Phase Consultation

By mid-December, the documents packet should be complete and submitted to the Congregational Transitions Director for review to make sure all materials are included. The search team may schedule a consultation with her as a team or individual team members may drop into her open office hours sessions in December for a preview of the discernment phase of

the search. Once the packet link is shared and the discernment-phase meeting is scheduled, if desired, applicant names may be released to the search team on 02 January.

The Release of Names

Ministers read congregational records and apply for opportunities in December. The name and ministerial records of interested ministers are released to search teams no earlier than 02 January.

The Initial List and Screening

Once the search team gets their initial list of applicants, the team should acknowledge receiving each record via email, send the view-only access link to the documents packet link to each applicant, request a link to the ministers' website (if this information is not shared in the ministerial record), and request the initial set of references (if these are not provided on the minister's website).

Ministers should acknowledge receipt of the email, including in their response a link to their website or YouTube channel and a list of references, if they have not already shared these with the search team through their search materials.

Reviewing Ministerial Applicants

Search teams are encouraged to review the ministerial records and ministers' websites before making decisions and/or requesting meetings. One variable that cannot be controlled is the amount of interest. Congregations with more interest may need to develop a strategy of how to be as thorough and as fair as possible, given the amount of material received.

Before reviewing applicants' records, search teams would do well to remind themselves what the congregation stated as the highest needs of the next ministry.

Additional Ministers

While most applications are received by 02 January, the UUA Transitions Team will continue to release names of interested ministers for two weeks until 16 January. If a search team is interested in continuing to receive names after 16 January, the search team should email the UUA Transitions Team with that request. Ministers wishing to apply to a congregation after January 16th should confirm via email with the UUA Transitions Team that the search team is still accepting names. The application cutoff for evaluation is when pre-candidate invitations are

made. Names released after the 16th should be considered in time for pre-candidate invitations on 23 January.

Limits for Ministers

Ministers may express their interest in up to 15 congregations at a time. Once a minister has removed themselves or been removed from consideration for a congregation, they can, if they choose, select another congregation and express interest.

Informing the Congregation

The congregation can know of the search team's process, that your record is live, that you've received names, and that you're hard at work. They should not be told anything about the pre-candidates or their names. For example, "Only folks who are new to ministry have applied" is not something to be shared. But giving the congregation a general calendar is strongly encouraged. It is important to remind the congregation that this is a time of high confidentiality, though you will be as open about process and timeline as you can be. Messaging should be high on hope and low on detail at this time in the search process.

FAQs

Why aren't names of interested ministers released to us once our record is live?

Ministers like to know they are on equal terms in the process. Some new ministers may not be cleared to search until early to mid-December. Additionally, we encourage all ministers in search to read all congregational records. Some ministers know which congregations they will apply to, others need to do more research. The UUA Transitions Team would rather reward thoroughness than speed in the minister's deliberation. This also allows search teams which are running a little behind schedule, for whatever reason, adequate time for their materials to be reviewed.

Can a search team adjust their congregational record after it has been made public?

They should not reduce compensation, increase minister's duties, or decrease the minister's authority without discussing their planned changes with UUA Transition Team staff. If they want to add a small detail or correct spelling or punctuation, they may do so and let the UUA transitions Team know which changes they have made.

What information should we include in our email to interested ministers? How precise should we be with our timeline?

Acknowledge receipt and express thanks for the interest. Ask for their website or sermon video links and initial references if that information is not already provided in the provided search materials. Send them your documents packet link (Remember, view-only access). Let them know when you're meeting, when you hope to do video interviews, when you hope to select pre-candidates. It need not be date specific but could be something like, "We are hoping to invite people to video interviews by mid-January and then select pre-candidates by the first day we can send pre-candidate invitations (23 January)." Then, if need be, let them know of adjustments, especially if you are struggling to identify your top applicants in time to extend pre-candidate invitations on 23 January. Letting them know is a courtesy, but will not cause them to wait for you, as they may confirm the three pre-candidate slots for which they are eligible on 24 January.

Are there ministers who are ineligible to apply?

Yes. Ministers removed from fellowship, on a hold from search, on settlement restriction from the UUA Transitions Team, and ministers who are not UU are held out of the search process. Additionally, if a minister served the congregation in some way and then left, that minister is not eligible to apply until they have been away for three full years.

Why should we not share more general information about the candidates?

We are a relatively small denomination. Even little bits of information (like "all of our applicants are new to ministry") could be a tip-off to a member about who might have applied. Additionally, such information might ping the biases of members who had preconceived notions of who would apply, cause anxiety, or encourage attempts to influence deliberations.

Why can't a minister apply to as many congregations as they wish?

A minister who puts their name out everywhere will give false hope to some congregations of real interest. Also, the minister should begin discernment earlier rather than later.

Are there other limits further into the selection process?

Yes, a minister may not accept more than three pre-candidating weekends.

How soon should we contact the ministers after we get their names?

Ideally, as soon as you get them, to share the view-only access link to your documents packet and thank them for applying. If a search team or minister decides not to continue with one another, then please let the other know as soon as possible. For search teams, you can send a message through the MinistrySearch system (click "Dismiss," then create an email on the subsequent page). Ministers may send an email to the search team, thanking them for their consideration and letting them know they are withdrawing from consideration.

Calendar

Review of congregational record by interim minister and/or regional staff and Congregational Transitions Director	Late November
Congregational records made public	First week of December
Review of documents packet	Mid-to-late December
Congregational Transitions Director consults with search team on the discernment phase	December
Names of ministers released to search teams	January 2 nd
Search team acknowledgement email	Early January
Last day names released to search teams without permission to extend	January 16 th

Forms and Links

- [Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)
- [Settled search calendar](#)

MinistrySearch System

Once the record has been approved and published by the Congregational Transitions Director, the search team will receive notification that the record will go live on 01 December.

Should the search team wish to make changes after publication, they should get the approval of the UUA Transitions Team before making changes to the live congregational record.

Other Related Information

Discussion

What does all the work from our preparation tell us about what we want in our next minister? And how does that compare to what we had in previous ministries? What unspoken pluses from previous ministries are likely to have gone unsaid in the information provided by the congregation? And if the congregation says it wants more of something from the next minister, what would we give up in order to get that in our next minister (unless you're paying significantly more than before or bringing in a ministry team)? Is it reasonable to have higher expectations without higher compensation?

Discussion

Do you have preconceived notions about what you are looking for before you begin reading all the information? What are the patterns that stand out as you begin reviewing records and websites (or in the case of ministers—documents packets)? What themes re-emerge from what you read or what you presented, not only with one congregation or minister but across all the information you read?

Phase Five: Discernment and Mutual Selection

Background Information to Improve the Odds of Better Decision Making

A new kind of anxiety or urgency may strike at this point in the process, usually a combination of excitement and concern. This is the moment when there is a greater need to take a breath, be reflective, notice what your anxieties are, and ask what these anxieties might help you to see more clearly and what they might keep you from seeing.

Often, the anxiety comes in the form of reactivity to something from the past.

The UUA Transitions Team has watched search teams base their entire ministerial search on one unspoken question: Who's not going to fire the music director? Who's not going to ruffle our most vocal people in the congregation? Who's the most charismatic speaker? Ministers have done the same, though with different questions.

There's also the great anxiety of not finding a minister or congregation. This, too, can lead to poor choices.

There are no guarantees, and there shouldn't be, about the search process. Not finding a match by a certain date does not negate the hard work a search team did (that hopefully the congregation recognizes) or the deep preparation a minister did.

Every search year is different, with a different pool of both congregations and ministers in the process, and that seems to affect the search process as much as how much hard work a congregation or minister has done. Sometimes a congregation or minister simply needed an extra year to be ready but did not know it.

The UUA Transitions Team has watched both ministers and congregations be too picky or not picky enough. They've witnessed what they thought were horrible choices turning out well. They've assured themselves that a particular mutual selection is what both the congregation and minister needed next, and the ministry lasted only three years. They've seen needles being found in the proverbial haystack and the metaphorical horse at the water station refusing to drink.

On the other hand, hard work generally pays off. Ministers who've done their homework know their skills and their limits do well in the process. Congregations that are aware of their gifts and challenges, have noticed historical patterns in the congregation's life, and are able to see and present ministry as a shared venture are more likely to fare well in the process.

At this moment, search teams should practice kindness and gratitude with each other and with prospective ministers. Ministers and search teams would do well to remember that not only is the minister looking for a ministry, but they are also expected to do ministry while they are searching with those who will select them. This is both fair and an extra burden. Prospective ministers should remind themselves that one way a search team could select a minister is by seeing how the minister does ministry with the search team.

What is not a fair request is, "How can you fix us so we don't have to do this ourselves?" or, as likely, "How can you be exactly as we want and idealize you to be without us having to do

anything at all?" Ministers who enter the search process expecting a perfect congregation that is going to love and appreciate everything they do and follow every suggestion the minister makes (because the minister does know better, after all!) won't last long in the ministry either.

So, as you move through this mutual discernment process, be kind to yourselves, be present to yourselves, and be realistic about good possibilities for ministry.

Key Elements

Initial List and Screening

When ministerial records are released, each search team member is encouraged to read all ministerial records and look at all websites of the applicants. Doing initial reference checks may also provide helpful insights in the screening process. Know that a few more applicants may come in over the next two weeks, but most names generally come on the first day. The new MinistrySearch system sends automated emails when new applicants express interest.

Visual Guide: Release of Ministers' Names

While every search team may devise its own screening process, the UUA Transitions Team recommends each member of the search team simply make a yes, no, maybe list of all the applicants, answering this simple question, "Could this person be our congregation's minister?" The UUA Transitions Team recommends two parallel screening questions (in no particular order):

1. Who has the ministry skills for what the congregation says it needs now?
2. Who presents as a good minister?

When the search team gathers, it should determine from everyone's lists where there is alignment and where there is a variety of opinion.

The UUA Transitions Team believes strongly that differing opinions present a great opportunity for the search team. If five people rate some highly, and two people are less enthusiastic, finding out more about people's thinking should be informative for the whole team. Asking, "What lens did someone have that others didn't?" may lead to a rich conversation and greater group clarity. It may also represent the diversity of the congregation, something all members should keep in mind and not cast aside.

In general, the UUA Transitions Team recommends that this list comparison happen at some point within a week of the initial release of names.

Ministers, too, would do well to answer the questions:

1. Do they need my gifts and skills now?
2. In what ways could I do good ministry with them (where do they hurt and where do they hope and find joy?)

Confidentiality

A reminder: take great care with any information you have and hold it in confidence. Avoid leaving papers around, computer files open, and sharing, even anonymously, tidbits of information about applicants.

Protocols

Once the search team has met and has begun its discernment process, they should notify ministers whom they know they will not continue to consider about their decisions. They can do that in the MinistrySearch system. They have the option in the MinistrySearch system (using the “Dismiss” button) to send a standard or customized note thanking the minister(s) for their interest, saying the search team is not continuing with them, and wishing them well in their search. Note: when sending messages outside of the search system, the minister will end up getting two emails.

Sending the email allows the minister to pursue other interests without thinking they are still being considered.

The same is true for a minister who has decided to withdraw from a congregation; please let that search team know sooner rather than later.

Video Interviews

Search teams schedule video conference call interviews with applicants as they move toward identifying pre-candidates. Usually, these interviews take about an hour with time for questions from both the search team and minister. All search team members should make every effort to be present, though in an emergency, and with the minister’s prior consent, video calls may be recorded. Questions should be consistent for each minister, though answers may prompt differing follow-up questions. Generally, these interviews happen in mid-January.

References

Some search teams immediately ask for references, which is recommended. Some search teams ask prospective ministers for initial references when they invite them for a video interview. The search team may continue with developed references when they have agreed upon pre-candidates. A candidate reference check is an option once the candidate is named.

Searching ministers are encouraged to reach out to the current interim minister, previous settled ministers, and ministers on staff at any time. Searching ministers may speak to regional staff about a congregation once named a pre-candidate to that congregation, or earlier if they have concerns which should be addressed before committing to pre-candidate.

See the longer section in Phase Three on References and Research Calls Coordinator for more detailed information.

Pre-Candidate Selection

Most search teams allot three slots for pre-candidating weekends. Search teams are encouraged, after all interviews are held, to return to this question with what the congregation hopes and needs in mind, “Could this applicant (or co-applicant) be our minister?” From that group, the search team should then decide whom to invite to pre-candidate and in what order.

Initial pre-candidating invitations may be extended as early as January 23rd (and not before), which is three weeks after applicants’ names are released to the search team. These invitations can be extended after the 23rd, if a search team simply needs more time, though they may miss out on their preferred choices by delaying. Search teams would do well to let all applicants know a timeline if they are going to extend invitations after the 23rd. They should not attempt to keep ministers in reserve who are not in their top three choices by claiming that they need more time, in a spirit of fairness to other search teams and ministers. This would not likely be effective as a strategy, anyway, as ministers are likely to move forward with the invitations they have rather than waiting for an invitation which may or may not come. Applicants may accept pre-candidating invitations at any time on or after the 24th. If an invitation is declined, the search team may move down its list to invite another minister who could be a good choice for the congregation.

Searching ministers are limited to three pre-candidating weekends. The UUA Transitions Team recommends giving the minister a three-day window to respond to the request to pre-candidate, though responses on the 24th are common. This allows a searching minister time to do final discernment about the possibilities ahead of them. At the end of three days, the minister should either have responded to the message or the search team can decide to move on. Once ministers have agreed to be a pre-candidate, they should not back out to go to another more desired congregation.

Once the search team has confirmed its pre-candidates, please send the other ministers an email through the settlement system to let them know you are moving forward with other ministers using the “dismiss” option. This is also true for ministers.

Ask your confirmed pre-candidates which of the pre-candidate weekends you have reserve would work for them, then schedule the weekends accordingly.

Once the search team has its pre-candidates confirmed, please let the UUA Transitions Team know the names and dates for pre-candidate weekends. This notification serves as a request for an interpretive file summary on each pre-candidate.

Interpretive File Summaries

Once the search team has selected all its pre-candidates, they may request an interpretive file summary for each from the UUA Transitions Team. An interpretive file summary is a summary compilation of the various evaluations a pre-candidate has received from other ministries and

ministerial assessments. The file summary is a short compilation (usually a half-page to a page) of these assessments, and often includes information from congregations served, internship sites, the career assessment, and the Ministerial Fellowship Committee. It will also confirm the standing of the minister with the UUA.

Requests must be submitted at least 10 days before the weekend visit and will be sent first to the minister for their review. The minister is free to ask questions about sources for the file summary. The week before the visit, the summaries are sent to the search team.

Once with the search team, the file summary is only for them and not for public consumption—even if the pre-candidate becomes the candidate.

Often, the file summary tells the search team what it already knows about the pre-candidate, which is one of the goals—that the minister has been forthcoming about their ministries to the search team.

Pre-Candidating Weekends

Pre-candidating weekends occur over the first seven full weekends in February and March (though a March Easter weekend may add a week to that calendar).

These weekends include a three-hour interview, a tour of the congregational facilities, a tour of the area, a vespers-style service, and a final break/fast/brunch/lunch interview. The UUA Transitions Team recommends that other social meal gatherings be provided as well. Pre-candidate spouses should be welcome this weekend at the expense of the search team and are welcome at all the events of the weekend except for the interviews. Expenses are the responsibility of the search team, which may either pre-pay or reimburse expenses.

Developed Reference Checks

Once the search team has selected its pre-candidates, a second round of reference checks is strongly suggested. These go beyond references the ministers recommend themselves, though it is essential to get the minister's consent to speak with developed references before contact.

The search team could and should now ask to speak to:

- someone in leadership in the ministers' current congregation or congregation last served. If this is a ministerial internship, the search team should speak to the supervising minister and/or someone on the internship committee. It is imperative to take great care to be mindful of the need for confidentiality. If a minister is currently serving a congregation, their search for a new ministry may not be public to the congregation. Yet every searching minister should be able to identify one trusted leader in their current congregation who can both be a good reference and keep confidentiality.
- Another developed reference option is based on the search teams desire for deeper clarity about a pre-candidate. For example, the search team may have some questions about the minister's involvement in staff supervision, anti-racism work, conflict-transformation, or trust building work, to name a few examples. The pre-candidate could then be asked by the

search team, “For a developed reference, we’d like to talk to someone of your choosing who could tell us about your work around conflict. Whom could we contact about this?” The search team is free to ask other questions of these developed references, too.

Current employees of a prospective minister’s congregation should not be asked to provide references for pre-candidates. To avoid putting any employee in a complicated spot by even having to be asked about (let alone provide a reference for) someone who has power over them, we encourage ministers to use former employees as references. For newer ministers, this might involve a previous career.

These reference checks may be done via phone, video, or email. Timing should not exceed 30 minutes. While there is no limit on the total number of developed references allowed, most congregations do two to four checks.

Reference questions should be consistent across the board. Search teams should remember that references often tell the prospective minister not only that they were contacted but also what they were asked and how the conversation went.

Research Calls with UUA Staff

The search team should set up research calls with UUA regional staff (or CUC, if Canadian) to learn more about their pre-candidates. **These are not reference calls, as denominational staff do not provide references for ministers.** Regional staff are keen to share what they know about pre-candidate ministers to help your search team find a great match.

The search team should ask each top applicant minister which staff person knows their ministry best before contacting a regional staff person. If the minister cannot connect the search team with a regional staff person, the search team may reach out to the Congregational Transitions Director to ask if anyone on staff is familiar with the ministry of the applicant.

Research calls are part of the due diligence of the search team. They are one of the main ways the UUA shares information about ministers with search teams. There is value in confirming the perception your team has formed about your top applicants...or in hearing stories which challenge those perceptions. Ministers and ministries are multi-faceted and cannot be reduced to a single narrative. The view of someone on regional staff can be somewhat limited, and forms only one piece of the puzzle. You may receive a great deal of information from research calls, or you may simply hear, “I have no red flags about this minister for your ministry opportunity.” You may leave the call with ideas about new references to request or questions to ask of your applicant, or you may simply feel more confident in your team’s perceptions of an applicant. Soliciting more perspectives will help your search team select a good match for your congregation.

Before asking questions of the regional staff person, please plan to share a bit about your congregation’s culture, needs, and context, especially if they are not familiar with your ministry.

Sample questions:

- How do you know our applicant? Have you worked with them directly? In what timeframe?
- These are the goals for the next ministry partnership our congregation has identified: [list goals, or ministerial qualities or skills]. How do you see this applicant aligning with these goals?
- Should we know about any other great qualities or growing edges?
- Do you have any concerns about their ministry, especially given what we have shared about our congregation? *Please note that if you learn something which surprises or disappoints you from regional staff, your team has not made a mistake in evaluating a pre-candidate as a potential match for your congregation. You may hear about behaviors or patterns that could cause concern or make a minister a poor choice for your congregation which do not rise to the level of misconduct, but about which your search team should be aware. Some examples: authoritarian management or communication style, resistance to accountability, poor boundaries, conflict avoidance or lack of skill in conflict transformation. You may also hear about the work a minister tried to do in a congregation which was not receptive to their efforts.*
- Can you think of a type of developed reference we should be sure to ask this applicant to provide? *This could be someone who could speak to the applicant's approach to a particular element of ministry (worship, pastoral care, promotion of inclusivity, administrative functions, etc.).*
- Are there others on UUA regional staff we should contact?

Ministerial Agreements (Contracts)/Deal-breakers

During the pre-candidating weekend, the search team and pre-candidate should spend some time talking about the proposed contract and compensation. This is the time for the pre-candidates to bring forth any “deal-breakers” which can then be taken to the negotiating team, if need be. These questions may be raised earlier in the process by either search teams or ministers, but there should be no surprises either way when the offer is eventually extended.

Discernment

Once the pre-candidate weekends are complete, both search teams and ministers should begin their final discernment about their options.

The last week between pre-candidating and submitting rankings to the UUA should be spent on discernment and follow-up. Did someone say something unclear or something which shifted your perception of a possible match? Follow up with them or find a way to get more information within the confidentiality guidelines of the search process.

During this week, the UUA Transitions Team asks ministers and search teams to create a list of yeses, maybes, and nos. Everyone should rank order their yeses in the order of preference. A maybe is a lower rank than a yes, which can affect matching. The UUA Transitions Team will verify all matches which are not mutual #1 matches with ministers and search teams who did

not have a match with their #1 choice, and will discuss maybe rankings, if needed, with the party who listed such a ranking before assuming it is a match.

List to UUA Transitions Team

Search teams must not communicate to any minister their intention to name them as a candidate before offer day. Ministers must not communicate their intention to accept an offer from a congregation before offer day.

If search teams or ministers finish pre-candidating weekends early in the pre-candidating window, these lists can be sent as soon as you are clear on your rankings. Ministers and search teams are free to continue contact with each other during this time, especially with follow-up questions that remain after pre-candidating, with the warning you may not offer or accept a position before the actual offer day.

By Monday (11:59 PM local time) after the last pre-candidating weekend of the search cycle, the UUA Transitions Team would like from **every** search team and **every** minister a list of your choices. **Search teams and ministers should share their yes (ranked), maybe, and no lists with the UUA Transitions Team using the appropriate form below.** The form also asks ministers and search teams whom folks contacted to learn more about potential matches and to identify any tied choices.

Search teams should decide which ministers you would welcome to serve with you, whom you might still consider, and whom you would definitely not select. For ministers, share the yes/maybe/no choices for congregations with the yeses in order of preference.

Ranking forms:

- For ministers: <https://uua.wufoo.com/forms/ministers-ranking-of-congregations> (you may include any developmental or contract positions for which you are in consideration with settled positions on this form)
- For search teams: <https://uua.wufoo.com/forms/search-committee-ranking-of-precandidates>

The UUA Transitions Team asks for search teams' and ministers' lists to gauge how things are going to play out and to try and make the overall process smoother and less anxious for all. The day before offer day, the UUA Transitions Team lets everyone know what will happen on offer day based on the rankings.

Here's an example of the matching process: if Rev. A and congregation X identify each other as mutual first choices, it's a match! If Rev. B identifies congregation Y as their first choice, and congregations Y and Z both identify Rev. B as their first choice, Rev. B has a match with congregation Y. The UUA Transitions Team would then check for an alignment between congregation Z and their second choice. Occasionally, the ranking is more complex to sort through.

The time between submitting the ranking form and hearing from the UUA Transitions Team about a match may feel longer than you might expect. *We share information as soon as we have it during offer week, usually the day before offer day.* Ministers and search teams with mutual first choice alignments and folks with no possibility of a match may hear their news earlier because these announcements are simple and obvious. When we're matching tied first choices or second or third choices, we ask folks to confirm that they are still enthusiastic about moving forward before notifying the other party. UUA Transitions Team staff also meet with parties whose highest alignments they ranked as maybes and folks who submitted tied rankings to support their discernment before offer day if their revised ranking would make a difference.

All the searches are linked and interrelated, as the result for one party depends on choices others have made. *UUA Transitions Team notifications depend upon the timing of ministers and search teams confirming that they are happy to move forward with their tied first choice or second or third-ranked yes before we inform the other party...and inform all the ministers and search teams whose matches depend on whether this alignment works out. Please plan to be responsive to inquiries from the UUA Transitions Team in the days before the offer date.*

Once we have complete information, we can say to each search team and minister before offer day:

- 1) You will be very happy on offer day when you reach out to (or hear from) your first choice, _____!

OR

- 2) It looks like your first choice has a different alignment, but your next option is available. Are you still good with this option?

OR

- 3) None of your yeses are going to work out. Let's talk about who's on your maybe list and give you a day or so to ruminate about this.

OR

- 4) Nothing is going to work out; let's talk about what comes next.

The UUA Transitions Team will not meddle in this process. If the first options match up, excellent -- even if it creates more open pulpits. While the UUA Transitions Team wants all congregations and ministers to be selected, it is far more important that fairness, good timing, and honest process are at work in this final discernment moment. The UUA Transitions Team covenants with search teams and ministers to fairness, good timing, and honesty as these lists dictate next moves.

Offer Date

No official offer may be made before noon EDT on the offer day identified on our search calendar. Once the time has arrived, search teams are free to reach out to all pre-candidates to either extend a verbal offer to the minister confirmed as a match by the UUA Transitions Team, confirm that pre-candidate ministers are going elsewhere, and/or wish them well.

FAQs

We (I) can't decide between two options. What should I/we do?

Search teams are encouraged to look at the results of the surveys/cottage meetings, etc., that gave them direction about what is needed in the next ministry. If a tie still seems unbreakable, talk with the Congregational Transitions Director or another UUA Transitions Team member, who may offer suggestions or clarifying questions. Ministers unable to decide should consult with family, colleagues, and the UUA Transitions Team, as well.

One of our pre-candidates dropped out of consideration. Can they do that?

This is rare, but it does happen. Ministers can apply across search types, and may be in consideration for contract, developmental, and settled ministries at the same time. While the developmental ministry search offer day aligns with the one for the settled search, an offer can be made for a contract ministry at any time. Occasionally, a minister who is a pre-candidate in the settled search will be so sure that a contract ministry is a better match for them than the settled positions where they are in consideration that they will drop out of the settled search to take the contract position. Most wait to see how the settled search plays out, however, before accepting a contract position. Sometimes a minister has changing care-giving needs, a family or health emergency, or a spouse with changing employment needs and they might need to drop out of search. Again, this does not happen to most search teams.

How did the process evolve into what it is now? It seems very rigid and controlled.

That's true, and it came out of desires to make the process fairer to everyone. At one time, there was no offer date. Search teams could simply make an offer, and that often happened after the first pre-candidating weekend. Other search teams and ministers cried foul. To even the playing field, an offer date was created.

That evolution continued when at noon Eastern time on the offer day, ministers figured out how to avoid phone calls from their second options in order to hear from their first option. Additionally, some ministers didn't return phone calls as they waited to hear from first options who never let that minister know they weren't being offered the position. Some positions weren't filled, and nothing was known about how things would go for two full days after the Thursday noon deadline.

A system of tipping off first options evolved and came to an unfortunate head when a search team learned their first choice was going elsewhere. They came back to that minister at 11:50 am on Thursday and said, "Would you change your mind if we offered you \$5,000 more?" The

minister did, and at the time, this wasn't against the rules. However, it did leave an imprint on the other search team who thought it had its first choice. Metaphorical dominoes fell because of that one change of mind, and multiple congregations who thought the search was going to work out one way discovered this was no longer the case. The resentment was understandably significant.

As a result, the UUA Transitions Team asked for a finalized list by that Monday prior to the offer day. To date, that has worked better for all, though it's still very hard to find out you do not have an offer to extend or accept. The fairer process does improve the odds that deals are not already made.

The process will always evolve toward greater fairness. That is the ultimate reason for these changes.

We don't have a match and we're devastated. What do we do?

It's much better to talk about this sooner rather than later. Some search teams would do well to have a pastoral conversation with the interim minister or the Congregational Transitions Director. It is important to be proactive in responding to the situation at hand. Some care, context, and support for strategy and messaging from outside of the search team is often helpful.

Calendar

Names of interested ministers released to search teams	January 2
Last realistic date to expect names (search teams may extend)	January 16
Video interviews (suggested time frame)	January 2-15
Initial reference checks and website reviews	Mid-late January
Pre-candidating offers made	January 23 rd and beyond
Pre-candidating offers accepted	January 24 th and beyond
Interpretive File Summary Request	10 days before 1 st visit
Pre-candidating weekends	Weekends in February and March
Developed references (including UUA staff)	February - March
Ranking List to UUA Transitions Team	1 st Monday after discernment week (week after 7 th pre-candidating weekend)
Offer Date	1 st Thursday after rankings are submitted, 12:00 PM Eastern

Forms and Links

- [Settled search calendar](#)

- [Visual Guide: Release of Ministers' Names](#)
- [Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox](#)
- [Sample Interview Questions for Search Committees and Ministers \(xls\)](#)
- [Government Reimbursement Rates for Mileage](#)

MinistrySearch System

On 02 January, prospective ministers' names are released to search teams. The search team can log in and view the ministerial records of those who have applied.

The MinistrySearch system has the capacity to send polite "no thank you" emails to ministerial applicants as the search team narrows its lists. The same is true for ministers who decide to withdraw their interest from a congregational search.

Discussion Prompts

Appearing "ministerial"

Malcolm Gladwell, among others, suggests we make decisions in a very short time, often based on our assessment of a person's appearance (Gladwell's talked about Warren G. Harding appearing "more presidential").

What makes someone appear more "ministerial" to you? What makes a congregation instantly more appealing?

Standards

When is it better to present no candidate than any candidate? What are our standards for bringing a minister to the congregation for candidating?

Phase Six: Finalizing the Offer

Background Information to Improve the Odds of Better Decision Making

At this point, an offer has been made and accepted. The focus turns now toward the wider congregation and more congregational involvement. There are several key pieces that need significant attention. Often, it's a time of relief and occasional impatience on the part of the search team and candidate. Still, it can also be a bit of a treacherous time, especially if elements take longer or prove problematic in some way. Misaligned expectations in contract negotiations can impact the subsequent ministry. Ministers serving a congregation will need to move quickly to make sure their current congregation hears from them that they are leaving. Attending to these elements impacts a lot of people. Care and goodwill are needed for all.

Key Elements

Contract Negotiations

As soon as the verbal offer has been accepted on that Thursday (noon EDT), the candidate may be turned over to the negotiating team. In theory, major deal-breakers have been discussed and resolved. The negotiating team and candidate should discuss any places needing negotiation, listen well to one another, and move forward toward a common resolution of the agreement and compensation. Relocation costs should be discussed (as of 2018 this is now taxable income, and congregations are advised to account for the extra tax in their offer) as well as all pieces of compensation. Other elements of the contract should be discussed and resolved. This can take anywhere from minutes to a couple of weeks, often depending as much on the schedule as anything.

Regardless of the time, the contract and compensation should be agreed upon prior to candidating week, and either the contract is signed and exchanged electronically, or mutually agreed upon and signed upon a successful call.

The [Office of Church Staff Finances](#) can be a valuable resource for specific questions, as this is often an educational moment for ministers and congregations.

Major changes to the contract at this time that have not been discussed constitute a breach of trust and will affect the ministry. Minor changes, if contentious, can have the same effect.

Please refer to the proposed contract, the suggested changes, and the standard UUA agreement.

Criminal Background Check

All congregations should do a criminal background check on their candidates, if for no other reason than consistency and the ability to honestly report they have done their due diligence.

These can take anywhere from one to four weeks. The background check only needs to be initiated to move forward with candidacy; surprises are extremely unlikely!

Congregations need only do the criminal background check and sex offender check. Credit and motor vehicle checks are not to be done on the candidate.

Listed under the forms section and in the Appendix are two companies which do background checks as well as a document from the UUA about responsible staffing. The companies listed are recommendations only; congregations may use the company of their choosing.

Announcing the Candidate

Search teams are eager to announce the candidate.

The announcement that a candidate has been found, without revealing the identity of the candidate, can be made after the candidacy has been accepted.

The announcement of the candidate's name can be made when:

1. There is complete agreement on the contract between the negotiating team and candidate.
2. The candidate has agreed and released their signed agreement to do a background check.
3. The minister, if currently serving a congregation, has informed the congregation of their candidacy.

The announcement must wait until all the conditions above are met. Once completed, the search team and candidate should agree that the announcement can be made and what information about the candidate can be shared (website is standard). The minister may want to make a brief greeting video to be shared as part of the announcement.

For Ministers Currently Serving a Congregation

Ministers currently serving a congregation must let their congregation know they are a candidate. It is not fair to the current congregation or the new congregation to wait until after candidating week to make this news public. There is no room for negotiation on this matter.

Upon accepting the candidacy, the candidate should tell their current congregational president, leadership, staff, and congregation to allow the congregation to move forward on their ministerial needs.

Departing ministers should talk with the Transitions Director about facilitating next steps for their congregation.

FAQs

Why can't we do credit checks?

Credit checks are not essential for good ministry and are invasive in ways that can lead to unnecessary judgments. Ministers generally don't ask for a credit check from the congregation's governing board, even though they are the ones responsible for church finances. Most ministers don't have check signing capabilities for the congregation.

How likely is it that something will come up in a background check for our new minister?

Extremely unlikely. Chances are you'll know anything that comes up if you've requested a file summary of the minister. Even then, most arrests that show up are for some sort of public protest. Still, every congregation should be able to say at some point they've done this as good standard hiring procedure.

Doesn't the UUA conduct background checks? Why do we have to handle a background check?

Ministers who are eligible to use our MinistrySearch system are in good standing with our Association. Our Association does not employ ministers who are serving congregations. As employers, congregations are responsible for the background checks of employees.

Why can't the minister wait until after candidating week to let their congregation know they are leaving?

Such a delay would hamper the congregation's interim minister selection. It takes about two weeks to prepare the congregational record for an interim ministry search. Since most candidating weeks are late April and early May, that means the congregation's search for a minister would miss the first offer date of interim search and possibly the continued interim search. The minister should make sure they are giving the amount of notice of their departure that their current contract requires.

Calendar

Negotiating team and candidate work out contract	Right after offer is accepted
Background check on minister	Right after offer is accepted
Minister informs congregation of departure	Within 10 days of accepting candidate status
Announcement to congregation	After the contract agreement is reached, background check is initiated, and minister has informed current congregation

Forms and Links

- [Responsible Staffing](#)
- [Oxford Document Management Company](#) (Background checks)
- [Church Mutual Insurance Company](#) (Background checks)

MinistrySearch System

There is no interaction with the system during this phase of search.

Other Related Information

Case Study

Our candidate is a person of color. Every minister of color in our movement has experienced some micro-aggression from the congregations they have served. Should we begin dealing with this in some way when we make the announcement of our candidate to the congregation? Should it wait? (This could be applied easily to other identities too, including trans/nonbinary candidates).

Discussion

What are the most important things we should say in our announcement about our candidate when we can do that?

Phase Seven: Beginning a New Ministry

Background Information to Improve the Odds of Better Decision Making

The work of settling a new minister comes to fruition in this phase, though this is more than a vote by the congregation on the candidate. This is a culmination of a process that started intentionally about two years before to prepare the congregation for its next settled ministry. From moving through the departure of the last settled ministry to transitional ministry to search to beginning a new ministry, the congregation and its search team have made a great deal of movement and done a great deal of work.

The congregation has placed a lot of trust in the search team, and it is important to know, even at this juncture with the apparent focus on the candidate, the congregation is still looking to the search team for leadership. As much as eyes and ears are on the candidate, they are equally on the search team, whom they know better.

And after candidating week is over, there is now the start of a new ministry which will coincide with the end of the current ministry and launch the congregation into the next phase of its life.

Key Elements

Candidating Week

The week usually happens toward the end of April and into early May. Candidating week is a time for congregational leaders, staff, and members to spend time with the candidate(s). The candidate(s) acts as minister during the week, having conferred with the interim about any special circumstances that may arise, but the congregation moves toward seeing the candidate as its minister. The interim minister is usually away during candidating week.

The candidate usually arrives a day before the first Sunday and spends the week leading two services, meeting with leaders, talking with members, engaging staff, searching for housing, and starting to learn the ins and outs of the congregation. Congregants should wear name tags for all events. Introductions, even if they've been done before, are a good idea.

The schedule of candidating week has already been suggested in the phase three section of this handbook. There should be balance during the week and the candidate should not have to be "on" all the time. Since the candidate is expected to be the minister, the candidate should have time off as well.

The week culminates on the final Sunday with a congregational vote. Most ministers see at least 90% as a successful call and will not agree to go with less (though often congregational by-laws indicate a threshold much lower than 90% and most ministers want >95% to accept a call). In general, the search team and candidate should have a sense by Friday of that week if things are not going well. There should be a quick check-in between the search team and candidate. If there are concerns, the search team and minister should check in with the UUA Transitions Team.

The vast majority of candidating weeks culminate in a successful call, however. On average, over the last two decades, there has been one unsuccessful vote every other year.

Theme-Based Candidating Week Model

The primary model is theme-based, with each day having a theme. Meetings are limited to three a day, and we'd recommend that they last less than an hour and have breaks in between (whether in person or virtual). The theme-based forums replace specific committees as the focus of alignment between the minister and congregation. This approach may be particularly useful as we think about the post-pandemic congregation.

Specifically, Tuesday/Wednesday/Thursday could be invitational to all committees and task forces to reflect on how their work is tri-fold—for the individual spirit, congregational health, and the congregation's role in the wider community. This may be new for some committees, but it might be a good mutual exercise to expand thinking about the work of the congregation with a minister in new ways. It might also bring some communication and connection between groups in the congregation. We also encourage people who are mainly interested in the life of the congregation to take part in these forums, even if they aren't on a committee or task force.

The abiding questions for ministers and congregational members provide a place to start conversations.

Make sure the minister has a real day off!

Traditional Candidating Week Model

This model has been around for three decades, at least. The pluses are that it's tried and true and gets engagement from the people who are often most active in the congregation. The minuses are that ministers and search teams often report it is exhausting and feels, at times, superficial.

Sample schedule:

Saturday: Arrival of candidate and family, meal gathering with search team, negotiating team, and governing board and spouses.

Sunday: Sunday service, congregational lunch, and question and answer time. Perhaps one other meeting with groups within the congregation.

Monday: Staff meeting during the day, individual staff meetings after all-staff, one evening meeting.

Tuesday: Meeting with area clergy, meeting with governing board, possibly one other meeting with committee/task force (often the finance committee).

Wednesday and Thursday: Meetings with various groups within the congregation, lunch with past presidents on one day, possibly a short open meet-and-greet during one of these days, if the search team and candidate want a second open meeting.

Friday: Search team check-in meeting, special time set aside in evening to meet with religious educators, parents, children, and youth.

Saturday: Day off.

Sunday: Candidate leads Sunday service. The minister and family are taken to lunch by a search team member who votes early. Ballots are counted. Minister(s) notified about the results when a decision is made.

The above schedule should, of course, be adjusted by the search team and candidate, as needed.

Virtual Candidating Week Model

Every candidating week was virtual in 2020; all had successful call votes. Most congregations spread these out over two weeks, though some did them in one week. Interfaith clergy or UU clusters were gathered virtually to meet the candidate. We tended to see fewer committee and small group meetings and a real craving for more informal social time. We learned that this informal time is more important than we realized-- the one-on-one interactions that often take just a moment or so can leave very important impressions on both the congregation and the candidate.

Some ideas to foster these moments were to open Zoom meetings a few minutes early or stay open late for people to drop in and chat (which we see happen in congregational meetings in general), having unscheduled open conversation time, allowing for a certain number of short phone calls—all might be possible. You may have other ideas; we'd love to hear them. If you're planning a virtual candidating week, please contact us to find out how you might adapt to the current models.

We recognize that candidating week is exhausting, and it will be important to maintain a schedule that allows for down time for the minister. Ministers already serving congregations are reporting "Zoom fatigue"—which could be more dramatic during a candidating week. Pacing will be important. Creating a schedule that works for mutual benefit and health will be very important.

Over the past year, congregations learned how to have meetings online and even vote. The UUA created this [Technical Guidance on Virtual Voting](#) page as a resource for congregations with impending online congregational votes.

Candidating Week: The Vote

In most cases, candidating week feels like a joyful homecoming. It has a celebratory feel and ends in a vote of 95%+ in favor of calling the candidate minister. In the rare cases in which candidating week has not gone well or congregational votes to call have failed, there has been some misunderstanding about what the congregational vote to call means and what happens if the call vote fails.

The search team has committed tremendous time and effort in identifying a ministry candidate who is a good match for the congregation from the pool of ministers who applied for their congregation's ministry position. The congregation should understand that if the vote to call the

candidate fails or is too low to be accepted, there are no other ministers waiting in the wings to be evaluated by the congregation. The congregation will need another year of interim ministry and to engage the settled search again the following year.

During candidating week, members are voting on:

- whether they affirm the comprehensive, inclusive, collaborative, transparent process which was used to find the candidate
- whether the congregation was heard by the search team
- whether the congregation was represented accurately by the search team
- whether they believe the search team saw the gifts of ministry which the congregation needs in the candidate
- whether the congregation is willing to move into a shared ministry partnership with the candidate whom the search team identified as a good match for the congregation's needs
- what is best for the whole congregation

They are not voting on:

- whether individuals think they would have chosen the candidate who was identified by the search team on their own, given what they know about the congregation
- whether individuals think, based on two sermons, that every sermon the candidate preaches will or will not speak perfectly to the hearts and minds of every single member every single time
- whether there might be a better match out there somewhere
- whether the candidate is the perfect minister. Ministers come with different skills in worship arts, pastoral care, administrative/organizational work, and social witness presence. No minister will have a high level of skill or interest in ALL of those elements of the ministry. The shared ministry of the congregation will and should shift with the skills and interests of the new minister.
- what is best for a particular individual within the congregation

Notice of Call/Contract

After the contract is signed and the vote confirmed, the [Notice of Ministerial Call](#) form should be submitted to the UUA Transitions Team along with a copy of the signed contract.

After Candidating Week

After candidating week is complete, the search team should meet to debrief one last time, shred any documents which list applicants' names, and most importantly, celebrate their good work. The team should retain a copy of the congregational record and the ministerial record of their new minister before the UUA Transitions Team archives completed searches.

One person from the search team should act as liaison for questions from the newly called minister after candidating week to field questions or point the candidate in the right direction. The candidate and interim minister should talk about how things will be handed off, and ideally

the interim minister and search team will keep requests from overloading the candidate between the end of candidating week and the start date. It is important for the newly called candidate to finish their own ministry and for the congregation to work at ending well with the interim minister.

The newly called minister, congregational leadership, and interim minister, should proceed knowing that there is a current minister under contract. Any involvement with the new minister must go through the current interim minister, and the candidate should not act as minister of the congregation until their contract begins.

The congregation should, at the end of the interim ministry, make sure the website is updated. Additionally, a photo directory for the new minister is a welcome gift. The minister's office should be cleaned and empty of anyone else's belongings before the settled minister's arrival. Repainting the office to the color of the minister's choosing is an added sign of welcome.

Arrival

Most ministers arrive in the area before their start date to settle in a bit, if possible. Often, they are not asked to preach in August, their first month, and see this as a time to begin to know the staff, meet with board members and other leaders, begin to familiarize themselves with pastoral care needs, and learn more about the congregation. Embarking on a path of deepening trust building and relationships is crucial to a successful ministry. This is a time of story-telling, and new ministers are encouraged to find out the history behind practices and expectations. Congregants and staff can remind each other that the new minister is in fact new and different from other ministers and not everything will happen in the same way. This is a time for curiosity and kindness.

Start Up/Covenant

Early in the ministry, the board chair and minister should reach out to the Congregational Transitions Director or the congregation's regional staff contact about what resources and assistance are available and recommended for the start of the ministry. Every region may have some differences in what they provide, but the field staff is there to help. Congregations with ministers from marginalized identity groups are strongly encouraged to reach out for assistance. Ministers with marginalized identities should feel free to ask the UUA for what they need as they begin their new ministries.

The new minister should become familiar with the current covenants of the congregation (members/staff) if present, and then work to enter into covenant with the congregation, its leaders, and staff. The covenanting process may be a reminder for the congregation, or this may be a time of co-creation or mutual alteration. There may be a public welcome and covenant with the new minister.

If the minister was an inside candidate and moved to being the senior minister, attention should be paid by the congregation to understand the minister to be in a new role with new responsibilities. This can be hard for some congregants used to interacting with the minister in their previous role and better to pay attention to this sooner rather than later.

FAQs

Are spouses and children welcome during candidating week?

Yes. Participation levels should be left up to the minister and their family. The family also may only be able to come for part of the week due to school or other commitments.

Why 90-95% for a call vote? Our by-laws say we only need 2/3 affirmative votes.

If more than 5-10% of the members of the congregation vote against the minister, that constitutes a significant group within the congregation—enough to be very problematic were the minister to accept the call.

Paper ballot or voice vote?

Most congregations do paper ballot, though it is worth checking to see if the by-laws state one option or the other. If not, it is up to each board to decide. It is also possible to conduct a vote electronically if the by-laws permit this. It is hard to determine an accurate percentage with a voice vote, so this is not the best option.

Who makes the motion to vote?

Unless your by-laws specifically state otherwise, the motion should come from the chair of the search team.

If we have a successful vote, can we have a party with the minister and their family?

Yes, some congregations do this. Usually, a search team member votes early, then escorts the minister and their family to lunch. Upon hearing of a successful call, the search team member takes the minister and family back to the congregation. Some ministers may not want this, however, so options should be checked out before being planned.

Why is our contact limited with the minister between the call vote and acceptance and their actual start date? We have planning meetings that require the minister.

Primarily, the congregation is not yet paying the minister to work. Second, there is a minister in place who is still the minister of the congregation. That should be honored.

What if something happens during the candidating week, like a member dies?

The candidate and interim should talk about this in advance, though the candidate should be seen as the minister during that week, generally.

What if we got less than 90% of the vote? Do we start all over again?

Yes and no. No, because this is a new moment. You're not starting where you were two years ago. And yes, in that we recommend a new search team of completely new members be formed (though this can be discussed with the UUA Transitions Team). It can mean the search team was more afraid of bringing no one than someone who was not a good match, or that they had disconnected from the congregation and lost touch with what the congregation needed. If the search team intentionally did not bring forth a candidate, feeling no interested minister would serve them well, then they have in fact done their work and could stay together to search again in the cycle ahead.

Calendar

Candidating week	Late April-Early May
Congregation submits Notice of Call/contract	Soon after candidating week
Ending the interim ministry well	May-July
Arrival	August 1
Start-up/covenanting with UUA staff support	Starting that first fall through following spring

Forms and Links

[Theme-based Candidating Week Model](#)

[Congregational Online Voting Resource](#)

[Notice of Ministerial Call](#)

[Ordinations and Installations](#)

MinistrySearch System

There is no interaction with MinistrySearch system during this phase of search. The UUA Transitions Team will remove the listing from public view, so the search team should download a PDF copy of their congregational record for their files. The search team may request a copy of their congregational record from the UUA Transitions Team at any time after it is archived.

Discussion Prompt

Anxiety

What were we, as a search team (or minister), most anxious about? What happened with that anxiety? What parts of the search were easier than we thought? Where did we spend too much or too little energy? What advice would you give if you were to talk to a neighboring search team?

If No Match Occurs

Overview

Every year, for a variety of reasons, some congregations and some ministers do not find a match. This may be the result of simple bad luck with misaligned ranking, or it may be the result of a search team's and/or minister's careful discernment and good judgment about not rushing into the wrong commitment.

If a congregation does not have a match on offer day, the search team notifies their board that there is no match in the current search cycle. The UUA Transitions Team is available to offer care, guidance, and perspective at this moment and to debrief with the search team.

Decisions and Timing

The board and current transitional minister should decide mutually whether to continue to work together for an additional year. If this is not possible or desirable, the board may decide to seek a new interim minister for a year and engage the settled search again next year. Alternatively, the board may decide to use the contract search process to find a minister who could stay a year—or more, if the match is good—and who could even be called in the future.

If a new search is needed, the board may form a new search team as a task force of the board with or without some members of the settled search team, in alignment with the preferences and energy levels of all involved. The board and search team should check out the [Transitional Ministry Handbook](#) to learn about the possibilities and processes for the interim and contract ministry search as soon as they can. The UUA Transitions Team will convert the settled ministry search profile into a contract or interim ministry search profile, upon request. The contract search begins as soon as the search team is ready and concludes when a minister is hired. The interim search begins toward the end of April and concludes in mid-May.

Whatever the board decides, the good work of the settled ministry search team and the congregational self-awareness which increased because of the interim ministry will shape the ministry partnership(s) ahead. The search team served the congregation well with its commitment to good process. No particular outcome was ever assured. If the search team could use some support in working through grief and disappointment, your transitional minister and/or the Congregational Transitions Director will meet with you to debrief the search experience.

FAQs

What should we say to the congregation and when?

An announcement like this should be made on the first Sunday following the offer date. Additional information may be provided as appropriate. "Our ministerial search team did not find a good match this search cycle. The work of the search team was to find a good candidate who would minister well with the congregation. So far that has not happened. Leadership, the search team, and our partners at the UUA are discerning together about the next move which will serve us all best. We thank the search team for their stellar work on our behalf so far. We know that all the work that went into this search will pay off in our next ministry."

What are some common realizations for congregations which did not find a match in a settled search?

Search teams often feel desperation, panic, and a sense of failure if they cannot find a candidate. Still, they know that if a poor match had been made, a short, conflicted ministry would be more disappointing and costly to a congregation (and minister) than doing another year of interim ministry. Many congregations simply are better served with another year of interim ministry.

Many congregations have reported that they realized they needed another year of interim work to be ready for a settled minister and didn't realize this until they made it through the first year of search (and second year of interim ministry). Perhaps they discovered some conflict in what the congregation believed about itself, unprocessed grief or trauma, or differing perspectives on what the congregation needs in the next ministry partner once they began their work. A first search without a match may well be indicating simply that the congregation needs more time to be ready for its next settled ministry.

What are some common realizations for ministers who did not find a match in a settled search?

A minister who applied, but did not become a candidate, in the settled search may let factors like salary and prestige affect their choices negatively for their continued search. They may settle for lower pay or a ministry to which they do not feel called. They may rush or feel discouraged. In the past, ministers have reported that they failed to ask enough questions when preparing to continue searching. Ministers still need to do thorough research as they continue searching, which may include speaking with the current minister, previously ministers, regional staff, and UUA Transitions Team.

What does it say about our congregation if we don't find a minister?

Self-esteem is a big part of a congregation's life, and it's reflected by the search team. Not finding a minister simply means that the search team did not find a match from the pool of searching ministers that year. Rarely is there one reason or a simple explanation for this result. Chances are the congregation was somewhat unlucky, had more to learn, or wasn't quite ready for a new settled ministry. It may be that the search team did its work well and found that no minister they considered was right for the congregation.

Forms and Links

[Transitional Ministry Handbook](#)

MinistrySearch System

If there is a pivot to a new search, the search team may make changes to its congregational record/search profile for the contract or interim search.

Appendix

Important Links

Overview

- [Settled search calendar](#)
- [Board Checklist for the Settled Search](#)
- [Transitional Ministry Handbook](#)
- [UUMA Guidelines](#)
- [Second Ministry Search Handbook](#)
- [Transitions Support for Congregational Staff](#)
- [Visual Guide: Search Cycle Newsletter Sign Up for Ministers](#)

Phase One: Concluding a Ministry Well

- [Settled search calendar](#)
- [Notice of Ministerial Transition](#)
- [Transitional Ministry Handbook](#)
- [Board Checklist for the Settled Search](#)
- [Minister Emeritus/a Policies](#)

Phase Two: Education and Preparation for Search

- [Settled search calendar](#)
- [Finding a Compensation Consultant](#)
- [General Compensation Information](#)
- [Board Checklist for the Settled Search](#)
- [Request Settled Ministry Search Support](#)
- [Visual Guide: Initiating a Search & Logging into the MinistrySearch System](#)

Phase Three: Building the Structure to Search

- [Settled search calendar](#)
- [Congregational Covenant](#)
- [Ministerial Covenant](#)
- [“Break Barriers, Build Beliefs” \(B4\) program information](#)
- [Blank Ministerial Record](#)
- [Visual Guide: Steps to Completing the Congregational Record](#)

- [Joint UUA/UUMA Recommended Ministerial Agreement for Solo/Senior Ministries \(Word\)](#)
- [Contract Change Form](#)
- [Compensation Worksheet](#)
- [A Guide to Process Observation \(from UU Regional Lead Rev. Dr. Ian Evison\)](#)

Phase Four: Opening the Search

- [Settled search calendar](#)
- [Visual Guide: Completing the Ministerial Record and Expressing Interest in Congregations](#)
- [Visual Guide: Sharing Files Confidentially via Google Docs and Dropbox](#)

Phase Five: Discernment and Mutual Selection

- [Settled search calendar](#)
- [Visual Guide: Release of Ministers' Names](#)
- [Sample Interview Questions for Search Committees and Ministers \(xls\)](#)
- [Government Reimbursement Rates for Mileage](#)

Phase Six: Finalizing the Offer

- [Responsible Staffing](#)
- [Oxford Document Management Company \(background checks\)](#)
- [Church Mutual Insurance Company \(background checks\)](#)

Phase Seven: Beginning a New Ministry

- [Theme-based Candidating Week Model](#)
- [Congregational Online Voting Resource](#)
- [Notice of Ministerial Call](#)
- [Ordinations and Installations](#)