



## Checklist for Congregational Boards Engaging a Settled Ministry Search

### When a ministry is ending

- Board president contacts Congregational Transitions Director, [Christine Purcell](#), and the congregation's primary contact on regional staff as soon as the need for a ministerial search is known or suspected
- Board and minister make a plan to end the ministry well, celebrating their good work together
- Board president completes [Notice of Transition form](#) (< 6 months from the end of the current ministry)
- Board members meet with the Congregational Transitions Director to review timeline and process of search, assess ministry needs if there will be a gap between the end of the current ministry and the beginning of the transitional ministry, plan for interim ministry search (if this is the best way forward), discuss [ministerial compensation](#), etc. (< 6 months from the end of the current ministry)
- Board reviews relevant sections of the [Settlement Handbook](#) (through phase two) and [Transitional Ministry Handbook](#), and checks bylaws for alignment with UUA search process
- Board makes communication plan to keep congregation engaged in transition process and informed about progress (the Congregational Transitions Director can help with this)
- Board president may apply for the [Targeted Ministry Program](#) (short term contract ministry) if there will be a gap between the ministry that is ending and the interim ministry. The [Transitions Office](#) manages this process

### During the interim search

- Board lets the Congregational Transitions Director or Transitions Office know who is on their interim selection team (usually a task force of the board with 3-5 members) so a congregational profile can be opened in the MinistrySearch System (interim search profiles open in early to mid-February). The interim search process is explained in detail in the [Transitional Ministry Handbook](#)
- Interim selection team completes application for interim ministry through a MinistrySearch Profile (between early February and late April)
- Interim selection team interviews applicants and recommends an interim minister for board hire (May). The interim search continues for selection teams and ministers without a match by the first offer date, or leadership chooses to pivot to a contract ministry search
- Board enters into an [agreement](#) (contract) with an interim minister (PDF and Word versions available on [transitions webpage](#))
- Board schedules transition interview with UUA regional staff during the last month or two of the ministry). The departing minister does the same.
- Interim ministry begins (01 August, typically a 12-month contract, renewable for the second year)

## During the interim ministry (or toward the end of a developmental ministry)

- Board or board members may meet with the Congregational Transitions Director or attend a drop-in overview session (offered in February) to learn about the settled search timeline/process
- Board contacts UUA [compensation consultant](#) to discuss compensation and benefits. There is no charge for this service
- Board identifies search team candidates following or closely approximating the process in [Settlement Handbook](#) (late winter the year before the ministerial call)
- Board establishes search team budget---typically \$10,000 - 18% of projected minister's salary and housing amount (spring after interim ministry begins)
- Board signs up for [search team coaching](#) (March-June). *Coaching is required for the UUA settled search process, and is available at a substantially discounted rate for congregations which contribute to our Annual Program Fund at the Honor level*
- Board holds congregational vote to elect the search team at regular congregational meeting using process explained in the [Settlement Handbook](#) (April-June)
- Board and search team members may attend an optional overview of the search process held on Zoom on a Saturday in June. Registration will be on our [website](#) by mid-May.
- Board identifies two board members to work with a member of the search team as the negotiating team, and creates [draft contract for settled ministry](#) in the fall (PDF and Word versions available on [transitions webpage](#))
- Board lets the search team do its work from June to the following spring, assisting with gathering documents, participating in cottage meetings, and offering support, not control
- Board members participate in the Break Barriers, Build Beliefs (B4) workshop led by UUA staff or volunteer trainers. This workshop promotes inclusivity in the search process and in ministry. The search team will apply for and schedule the workshop in collaboration with leadership. *The cost of this workshop is covered by the coaching fee unless the congregation wants the trainer to appear in person..*
- Negotiating team works with settled ministry candidate on contract agreement (late spring)
- Board participates in candidating week (late spring) with the ministry candidate chosen by the search team, and holds a congregational vote on the last Sunday of that week
- The board submits the [Notice of Call](#) and a copy of the signed employment agreement to the UUA Transitions Office after successful congregational vote

## The start of a new settled ministry

- New settled ministry begins (August 1)
- Board participates in shared ministry start-up with UUA regional staff (usually fall-winter of first year of settled ministry)
- Board makes sure to budget for sabbatical coverage or the next ministry search

## How to get help from the UUA transitions team:

- Email the [Transitions Office](#) or the Congregational Transitions Director, [Christine Purcell](#)
- [Schedule a call](#) with the Congregational Transitions Director, Christine Purcell
- Open office hours for questions about any transitional ministry search (interim, developmental, contract): please join Christine Purcell on Tuesdays between 3:00 and 5:00 PM Eastern: <https://uua.zoom.us/j/95425414067>
- Open office hours for questions about settled ministry searches: please join Christine Purcell on Thursdays between 3:00 and 5:00 PM Eastern: <https://uua.zoom.us/j/91354359680>

Complete calendars with precise dates of interim and settled search milestones and deadlines are available on the [transitions webpage](#).