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with corrections May 2022
(Adapted from April 2019 version for clarity and cosmetics)

UUA/UUMA Recommended Interim Ministerial Agreement

Introduction

This Interim Ministerial Agreement is a model provided by the Unitarian Universalist Association and the Unitarian Universalist Ministers Association to assist Congregational leaders and ministers in drafting an interim ministerial agreement that meets their mutual needs. This March 2022 version has been edited and reformatted from the April 2019 edition primarily for clarity and ease of use. UUA Congregational Life, Church Staff Finances, and Transitions staff are available to provide additional resources and answer questions.

This sample agreement is not intended to be legal advice. Congregations and ministers are advised to consult their own legal counsel in order to tailor this document both to each Congregation's specific needs and to the employment laws of their state and locality.

The UUA Office of Church Staff Finances continues to welcome suggestions for improving this document. Please direct specific comments/recommendations to Jan Gartner, UUA Compensation Programs Manager, at JGartner@uua.org.

Jan Gartner, JGartner@uua.org
UUA Compensation and Staffing Practices Mgr

Rev. Richard A. Nugent, RNugent@uua.org
Director, UUA Church Staff Finances

Rev. Keith Kron, KKron@uua.org
Director, UUA Transitions

Interim Ministerial Agreement

[Name of Congregation, City/State] (“The *Congregation*”) AND [Name of Interim Minister] (“*The Minister*”) jointly enter into this covenantal agreement.

1. GOALS AND RELATIONSHIPS

1.1 Intent

The intent of this Agreement is to set forth the responsibilities and obligations of the Minister to the Congregation and of the Congregation to the Minister. The relationship between the Congregation and the Minister must be grounded in open communication and mutual trust.

1.2 Shared Leadership

1.2.1 Consistent with our understanding of the covenant that binds us in an evolving living tradition, the Minister and the Congregation share the leadership and ministry of the Congregation. The relationship of the Minister and the Congregation will be in accordance with Unitarian Universalist Ministers Association (UUMA) Guidelines for the Conduct of Ministry. (See <https://www.uuma.org/guidelines>.)

UUMA Guidelines: All ministers are encouraged to join the UUMA and congregations are urged to budget professional expenses sufficient for ministers to maintain UUMA membership. The benefits of ministerial membership in the UUMA include support for their ministries, continuing education opportunities, collegial relationships, and participation in UUMA business, all of which strengthen ministry for the benefit of congregations.

1.2.2 The Congregation looks to the Minister to provide:

- Spiritual leadership,
- Historical and theological perspective,
- Assistance with setting and implementing the congregation's mission,
- Guidance in navigating through the work of the interim period,
- Oversight of the Congregation's programs,
- Leadership of the staff team, and
- Administration of the Congregation's business operations in collaborative partnership with lay leaders and staff.

1.2.3 The Minister looks to members of the Congregation to:

- Live out the Congregation's mission and vision,
- Demonstrate effective leadership,
- Enthusiastically engage in the work of the interim period,
- Be open to change,
- Broaden the meaning of community, and

- Communicate issues or concerns in a forthright and respectful manner through established communication channels.

1.2.4 The Board commits to remaining in covenant with the Minister and holding members of the Board as well as the Congregation to behavior that is respectful of the Minister and of the office and consistent with Unitarian Universalist values.

1.2.5 The Board commits to working with the Interim Minister to fully engage in the work of the interim period including:

1.2.5.1 Heritage: Reviewing how the Congregation has been shaped and formed; encouraging and hearing all of the stories about the Congregation's past, as the foundation upon which the present rests; and embracing the rich variety that makes up the Congregation.

1.2.5.2 Leadership: Reviewing the membership needs and its ways of organizing and developing new and effective leadership; providing opportunity for individuals and the Congregational organization to examine the types of leadership needed for new leaders to emerge, and for seasoned leaders to recommit or to refocus their gifts.

1.2.5.3 Mission: Defining and redefining sense of purpose and direction; clarifying the faith community's identity and core values; working to develop, update, and revitalize mission and vision statements; and reviewing strategic and tactical plans including stewardship and the financial health of the congregation.

1.2.5.4 Connections: Discovering and revitalizing all the association, interfaith, and community relationships a congregation builds outside of itself; and re-assessing old links and considering new ones.

1.2.5.5 Future: Developing congregational and pastoral profiles that position the congregation for its next ministry, including a healthy and honest assessment of the other focus points so that the congregation can turn its energy toward proactive decision-making for the future.

In addition to the full array of responsibilities expected of all congregational ministers, interim ministers have additional developmental tasks specific to interim ministry. These tasks have been developed over time by the Interim Ministry Network and adopted by the UUMA Transitions Chapter.

1.3 Monitoring and Nurturing the Health of the Ministry

1.3.1 Transitions Team: In consultation with the Minister, the Board shall appoint a Transitions Team of congregational members who are well-known, respected, and not members or spouses/partners of the current Board. The Transitions Team will help facilitate the work that the Congregation will undertake during this interim period.

1.3.2 Interim Progress Appraisals: The Minister and designated leaders from the Board and/or Transitions Team will complete Interim Progress Appraisals according to the process and schedule outlined in the Transitional Ministry Handbook.

A variety of resources are available. Contact your Congregational Life staff for guidance and resources on assessments.

The Transitional Ministry Handbook can be found at: https://www.uua.org/sites/live-new.uua.org/files/transitional_ministry_handbook.pdf.

1.4 Start-Up: As soon as feasible, the Minister, the Board, the Transitions Team, and other appropriate congregational leaders and staff will set aside time to explore the history, culture, and norms of the Congregation, discuss the sharing of power, authority, and responsibilities, finalize reasonable goals for this period of ministry, and begin planning for the periodic review and renewal of the ministry of the **Congregation.**

1.5 Anti-Racism, Anti-Oppression and Multicultural Awareness: The Board and the Minister commit to addressing the systemic prejudices and biases found within all parts of society. This work includes ensuring that the Minister(s), staff, and members are trained to understand, welcome, and better serve an increasingly diverse community.

The Board and Interim Minister will continually address the ways that systems of oppression within and beyond our Congregation are perpetuated and agree to collaborate on a joint process of reflection to ensure progress. This includes, but is not limited to, the ways in which the characteristics of dominant cultures live in our practices, systems, procedures, and lives.

When congregations hire ministers who themselves hold historically or currently marginalized identities, the minister will be free to determine the extent to which they are called to lead in dismantling injustices related to the minister's own identities.

Historically and currently marginalized identities include, but are not limited to, those held by Black, indigenous, and people of color, people who are trans, genderqueer, or nonbinary; LGBTQ people; women; fat people; poor and working class people; neurodivergent people; people living with disabilities; and many others.

The Congregation may begin by examining its own policies and practices that have hindered living our Unitarian Universalist values. This might include an analysis of lessons learned from past efforts to become more equitable and diverse, a review of Congregational hiring decisions, development of hiring practices and procedures for mitigating bias, and a commitment to increase the capacity of all staff and leaders to serve a diverse Congregation with emotional intelligence and cultural competence. Resources are available through the UUA Congregational Life staff. The congregation should also explore local resources, particularly those from communities of color or other historically marginalized groups.

1.6 Ongoing Dialogue: The Board and Interim Minister recognize the different cultural, racial/ethnic, ability, gender, sexual orientation, generational, economic, social, and theological experiences and identities that exist within our congregation, aware that these differences can be sources of both strength and challenge.

- The Board, the Interim Minister, and the Transitions Team commit to honest and ongoing communication about how identity and power impact and shape the congregation.
- The Board and Interim Minister commit to addressing concerns that arise, recognizing that conflict is inherent to a diverse community.
- Congregational leaders will consider how differences in identity, experience, or power might be a factor in any conflict.
- The Board and Interim Minister will hold themselves accountable to our shared values and may seek an outside facilitator from the UUA or other mutually agreeable organization.

Increasingly, conflicts involving congregational staff, including the minister, seem exacerbated or even triggered by different life experiences, identities, and expectations. Congregational leadership need to be attuned to this possibility, and promptly address it with outside facilitators if necessary.

2. RESPONSIBILITIES

2.1 Services to the Board and Leadership Groups

2.1.1 Board: The Interim Minister will be an ex officio member, without vote, of the Board. The Interim Minister will bring to the attention of the Board matters significantly affecting the life, operation, and mission of the Congregation.

2.1.2 Committees/Teams: The Interim Minister will be an ex officio member, without vote, of all committees, task forces, or teams except a Ministerial Search Committee.

- The Interim Minister will confer, as needed, with each committee on how best to work together to serve the Mission of the Congregation.
- Attendance by the Interim Minister at committee meetings is welcome, but not routinely expected.
- The unique role of the minister in advising the Nominating/Leadership Development Committee is acknowledged, as the minister is expected to have a breadth and depth of relationships and perspectives to help identify appropriate leaders for the Congregation.
- The Ministerial Search Committee will confer with the Interim Minister on the work of the interim period as it will influence the next called ministry, but neither the Committee nor the Interim Minister will discuss specific prospective candidates for the called ministry.

With respect to ministerial participation in committee meetings, congregational cultures and practices vary. Especially early in the ministry, attending group meetings is an important way for the minister to learn about the activities of the congregation.

2.1.3 Financial Records: The Minister will have access to all financial records, including pledges and pledge payments.

2.2 Pulpit and Worship Services

2.2.1 Free Pulpit: The pulpit is free. The Minister is expected to express personal and faith values, views, and commitments that are consistent with our understanding of our evolving living tradition without fear or favor.

The concept of freedom of the pulpit is addressed in the Congregational Governance section of Interdependence: Renewing Congregational Polity (Commission on Appraisal, 1997). See <https://www.uua.org/leadership/learning-center/governance/polity/47009.shtml>.

2.2.2 Accountability for Worship Services: The Interim Minister is accountable for all worship services, including rites of passage, whether or not the Interim Minister is involved in planning or leading a given service. All services, including weddings and memorial services, conducted by outside officiants must be pre-approved by the Interim Minister.

Consistent accountability for worship is helpful and clarifying, especially if problems or differences in opinion arise in this essential area of congregational life. It is not intended to imply that the minister is directly responsible for planning and implementing every service!

2.2.3 Leading Worship: The Minister will lead or co-lead worship between 30 and 35 Sundays each year, as well as major religious holidays observed by the Congregation. This number may be reduced to enable the minister's involvement in religious education or other concurrent programming.

- The Minister will be off and relieved of all responsibilities on at least one Sunday per month, as well as Sundays while on vacation and study leave.
- The Minister will be relieved of all responsibilities for up to four Sundays each year to participate in denominational activities such as UUA General Assembly and regional meetings, collegial gatherings, or UUA/UUMA committees.
- The Minister will communicate the dates of Sundays away in advance to the Board.

30 to 35 Sundays is a typical schedule which takes into account monthly Sundays off, vacation and study leave, and denominational activities. Based on the priorities of your congregation, and with careful attention to overall scope of work, this number could be adjusted (up or down).

2.2.4 Reserve/National Guard Service (Add if the Minister serves as a Reserve or National Guard Chaplain): The Board and Minister recognize the benefits and challenges of having a Minister serve as a Chaplain in the Reserve or National Guard. The Board and Minister will work together to ensure the needs of the Congregation are met during periods of military service by the Minister.

UU ministers serving as Chaplains in the National Guard or Reserves are required to commit a minimum of one weekend a month for training responsibilities or other term as required by law or lawful authority. The UUA recommends that the language of the Agreement and benefits provided for Ministers in guard and reserve positions be reviewed at the time for compliance with law. The UUA recommends considering such training as weeks away for denominational activities or study leave. For guidance, see the UUA Guidelines for Reserve and Guard Chaplain Support: <https://www.uua.org/sites/live-new.uua.org/files/uua-approved-reserve-guidelines-20160616.pdf>.

2.3 Other Ministerial Services

The Minister will conduct rites of passage, including weddings, child dedications, and memorial services as well as provide pastoral care services, including crisis intervention and visitation of the homebound, sick, dying, and bereaved, both directly and in conjunction with the Congregation's pastoral care program.

- The Minister will maintain awareness of personal limitations and boundaries, referring members for professional counseling and other specialized services as appropriate.
- The Minister will provide such ministerial services and counseling to members of the Congregation without fee or honorarium.
- The Minister may charge a fee when rites of passage, pastoral care services, and other ministerial services are provided to non-members of the Congregation.

Regarding fees charged for non-members, see the UUMA's Scale of Recommended Fees for Professional Services: <https://www.uuma.org/page/professionalfees>.

2.4 Community Activities

The Interim Minister may serve in the community beyond the Congregation and will inform the Board of such action through periodic reports.

2.5 Relationship to Congregational Staff

2.5.1 Minister's Role: (Choose 2.5.1a OR 2.5.1b.)

2.5.1.a The Congregation operates under policy governance, and the Minister serves as Lead Executive/CEO operating consistent with the policies, authorities, and limitations adopted by the Board. The Minister is responsible for ensuring appropriate implementation and management of policies regarding staff, including staffing practices, maintenance of all personnel records, clear and accurate job descriptions, timely enrollment of eligible staff in offered benefit plans, annual compensation reviews, staff evaluations, and a dispute resolution process. The Minister has authority to hire, discharge, change the compensation of Congregational staff or implement other major personnel-related changes consistent with Board Policies.

2.5.1.b The Minister is Head-of-Staff and is responsible for the development of equitable and appropriate policies and the supervision of staff. The Minister may delegate supervision of individual staff members. The Minister is responsible for ensuring appropriate management and supervision of staff including development of appropriate policies and practices, maintenance of all personnel records, clear and accurate job descriptions, timely enrollment of eligible staff in offered benefit plans, annual compensation reviews, staff evaluations, and a dispute resolution process. The Minister has authority to hire, discharge, change the compensation of Congregational staff or implement other major personnel-related changes in consultation with the Board.

Governance models, including the role and authority of the Minister, vary greatly from congregation to congregation. In adopting language for this section of the Agreement, Congregational leaders need to be clear about the role of the Minister in Congregational Governance. Consider how consistency, clarity, and accountability for staff supervision and support – as well as alignment of mission and goals across programmatic areas – occur. UUA Congregational Life Staff, including your Transitions Coach, and your Interim/Developmental Minister are available to help your leadership team review your current governance structure, consider other governance models, and help you to settle upon the appropriate management role for your next called Minister.

It is important to be clear about the Minister's gifts and limitations. Some ministers will be great CEOs and some may rather hire/assign someone else as lead executive. Clarity of role and expectations will help things run smoothly.

2.5.2 Relationship to Other Staff: The Minister, in collaboration with congregational leaders, has primary responsibility for overseeing the implementation of the vision and mission of the Congregation.

- The Minister, as staff lead, will foster a collaborative environment among staff.
- The Minister will take care that staff roles and relationships are reviewed, discussed, and re-negotiated with clarity, respect, and honesty.
- The Minister will enter into a covenant with the other professionals [see box below] on staff to delineate the roles and responsibilities of each as well as the means to resolve any disagreements.
- If there are other ministers serving the Congregation, the Interim Minister will serve as lead of the ministerial team. Other ministers will report to the Interim Minister.

The definition of "professional" staff varies across congregations. It often refers to lead program and administrative staff and should include any staff who are active members in their respective professional organization.

The relationship between/among ministers is governed in part by the UUMA Guidelines and in part by their individual relationships with the Congregation. Reach out to the UUA Congregational Life staff and the UUA Transitions Director for guidance.

3. COMPENSATION, BENEFITS, AND PROFESSIONAL EXPENSES

3.1 Salary and the Allocations to Housing Allowance

3.1.1 Salary and Housing Allowance: The Congregation will provide to the Minister an annual starting salary, including housing allowance, of \$_____. Salary and Housing shall be payable [monthly on or before (date), or semi-monthly beginning on (date)].

Several special tax provisions apply to ministers. See the following articles for an explanation of the Housing Allowance:

- Ministerial Compensation 101: <https://www.uua.org/leadership/library/ministerial-compensation>
- Housing Allowance: <https://www.uua.org/leadership/library/housing-allowance>.

Select 3.1.1.a or 3.1.1.b, below.

3.1.1.a Housing Allowance: Consistent with federal law, the Board will annually designate a portion of salary as a Housing Allowance once the Minister has ascertained the expected cost of housing.

OR

3.1.1.b Parsonage: The Minister will have free use of the parsonage at [address]. The fair rental value of the Parsonage is estimated at \$_____ and may be adjusted annually by the Board as appropriate. All reasonable and necessary maintenance and repairs will be performed promptly at the Congregation's expense. In addition, the Congregation will provide a Parsonage Allowance of \$_____ to be used by the Minister for utilities, cable, phone and internet, lawn care, snow removal, and other incidental expenses associated with the Parsonage.**3.2 Employee Benefits and Professional Expenses:** Consistent with UUA Compensation Standards, the Congregation agrees to provide employee benefits as follows:

UUA Compensation Standards include these Benefit Recommendations:
<https://www.uua.org/leadership/library/benefit-recommendations>.

3.2.1 Payment-in-Lieu of Social Security/Medicare Tax: The Congregation will make a [per paycheck/monthly/quarterly] payment-in-lieu of the employer's FICA payment. This payment to the Minister is currently 7.65 percent of salary and housing up to the Social Security tax cap and 1.45% of the excess.

Several special tax provisions apply to ministers. Refer to Ministerial Compensation 101 for an explanation of the payment in lieu of FICA (or Self-Employment Tax Offset):
<https://www.uua.org/leadership/library/ministerial-compensation>.

The salary cap for the Social Security portion of FICA (6.2%) is \$142,800 in 2021. The Medicare portion is 1.45% on compensation up to \$200,000 for single taxpayers (\$250,000 for married filing jointly) and 2.34% above that threshold. Congregations CANNOT pay FICA directly for the minister to the IRS. The in-lieu payment is paid directly to the minister, who pays quarterly self-employment taxes.

3.2.2 Retirement Contribution: The Congregation will make contributions to a qualified church retirement plan. All eligibility and participation requirements will be adhered to, as determined by the Plan Sponsor and pursuant to the applicable plan documents and federal law. Contributions will be submitted by the applicable federally-regulated due date for each contribution type.

The recommended employer contribution for staff meeting eligibility requirements is **10% of salary** (and housing for ministers). UUA Compensation Standards can be found at: <https://www.uua.org/leadership/library/uua-compensation-standards>. While 10% is the UUA recommendation, the congregation is *required* to contribute in accordance with any commitments they have made to their Plan Sponsor (UUA or other). See 3.2.2.1.

3.2.2.1 For congregations in the UU Organizations Retirement Plan: Consistent with the legal commitments outlined in our congregation's Employer Participation Agreement on file with the UUA Office of Church Staff Finances, the Congregation will make a ____% Employer Contribution. [And, if applicable, a ____% matching contribution and/or ____% auto-enroll.] The Congregation will define compensation in accordance with the exclusions we have designated in item 4 of that Agreement. If at any time an inconsistency is found between this Agreement and the congregation's Employer Participation Agreement, the staff or lay leader responsible for Retirement Plan administration will immediately contact the UUA Retirement Plan Director, RetirementPlan@uua.org, for assistance in coming to a resolution. Along with all other employees, the Minister can authorize elective contributions through salary deferral at any time.

The UU Organizations Retirement Plan is an IRS-qualified 401(a)/(k) defined contribution church plan and is federally regulated. All employees who satisfy the Plan's Year of Eligibility Service provision (See 2.42 in the UUA Plan document) must be enrolled in the UUA Retirement Plan and all must receive the same percentage employer retirement contribution, as specified in the congregation's Employer Participation Agreement. Ministers meet the Year of Eligibility Service provision through completion of the UUA's ministerial credentialing process.

Information about Elective and Employers' Contributions, including rules for matching contributions, can be found at: <https://www.uua.org/finance/compensation/retirement/contributions>.

For congregations who have chosen auto-enrollment for their staff, see <https://www.uua.org/finance/compensation/retirement/auto-enrollment>.

3.2.3 Insurance premiums: The Congregation will enroll the Minister on a timely basis and pay insurance premiums as follows:

3.2.3.1 Comprehensive Health Insurance: Payment of 80 percent or more of the premium for comprehensive employer-provided health insurance with benefits comparable to the UUA PPO/Standard PPO Plan for the Minister and 50 percent of the additional cost of covering any dependents (spouse/partner and/or children). For employees on Medicare who are enrolled in Medicare Part A and Part B and elect the UUA's Medicare Supplement, the Congregation will pay 80% of the employee's premium for the Supplement and 50% of the additional cost of coverage for any enrolled dependents.

Information about the UUA Health Plan can be found at:

<https://www.uua.org/finance/compensation/health>.

We strongly discourage congregations from providing additional salary to employees who do not need health insurance. However, it is possible to reimburse employees on a tax-free basis for *the differential cost* of participating in another group insurance plan, such as a spouse's plan. See <https://www.uua.org/leadership/library/insurance-taxes>, Tax-Free Reimbursement of Other Insurance section. Such a reimbursement should be offered through a policy that applies to all staff.

See Medicare reimbursement rules at:

https://www.uua.org/files/pdf/a/aca_8th_update_revised_2_nov_15.pdf.

*Note: It is **illegal** to reimburse employees for premiums paid for an individual health insurance plan.*

3.2.3.2 Dental Insurance: Payment of 80 percent or more of the insurance premium for dental insurance provided through the UUA, or its equivalent, and 50 percent of the additional cost of covering any dependents (spouse/partner and/or children).

Information about the Dental Plan offered through Guardian by the UUA can be found at:

<https://www.uua.org/finance/compensation/group/dental>.

3.2.3.3 Long-Term Disability Insurance: Payment of 100 percent of the premium for the long-term disability insurance provided by the UUA, or its equivalent. The premium amount will be imputed as taxable income on the Minister's W-2.

Information about the Long-Term Disability (LTD) Plan offered through Guardian by the UUA can be found at: <https://www.uua.org/finance/compensation/group/ltd>. Note that the UUA Long-Term Disability Plan must be offered along with Life Insurance.

Imputing (adding) the premiums on an employee's W-2 ensures that any future benefit paid (as the result of a claim) is not taxed. While not legally required, this practice is strongly recommended for all employees enrolled in LTD.

Important! If the minister is moving from a congregation with a different disability carrier from your congregation, be aware that pre-existing conditions may not be covered for a period of time after a change in carriers.

3.2.3.4 Group Term Life Insurance: Employer payment of 100 percent of premium for group life insurance provided by the UUA, or its equivalent. As required by law, the appropriate amount will be imputed as taxable income on the Minister's W-2.

Information about Life Insurance offered through Guardian by the UUA can be found at: <https://www.uua.org/finance/compensation/group/life>. For premiums and important taxation information, see: <https://www.uua.org/finance/compensation/group/life/premium-tax-info>. Note that the UUA Life Insurance must be offered along with Long-Term Disability.

3.2.3.5 State Required Employee Insurance: The Congregation will review and comply with its obligations to participate in other insurance programs required by state law including Workers Compensation.

Laws governing church participation in programs such as Unemployment Insurance and Short-term Disability vary from state to state. In most states, religious organizations are excluded from the state Unemployment Insurance program. Be sure to learn about the laws of your state.

3.2.4 Professional and out-of-pocket expenses: The Congregation will provide the greater of 10 percent of Salary and Housing or \$8,000 for professional expenses through an Accountable Expense Reimbursement Account developed jointly by the Minister, President, and Treasurer. Eligible expenses related to the Minister's ministry will be reimbursed from that account promptly upon submission of a timely reimbursement request.

- Appropriate documentation is needed for expenses exceeding \$_____ (must be no more than \$75).
- The Congregation will reimburse such expenses at the maximum rate allowed by the tax laws.
- Equipment purchased with these funds will be the property of the Congregation, although such items may be subsequently purchased by the Minister from the Congregation at the item's depreciated value or the depreciated value may be imputed as income on the Minister's paycheck.
- The Congregation and Interim Minister understand that IRS rules for Accountable Reimbursement Plans prohibit unused professional expenses from being shifted to salary.

Eligible expenses include, but are not limited to, ministry-related travel, automobile mileage, lodging, meals, incidentals, conference registration, UUMA and other professional dues, continuing education, clergy robes, books, periodicals, dues, and office equipment such as phones, computers, and printers.

IRS regulations specify that receipts must be provided for expenses over \$75. The congregation can choose a lower limit. We recommend setting a uniform reimbursement policy for all staff.

For more on professional expenses, see <https://www.uua.org/leadership/library/money-matters/professional-expense>.

3.3 Review of Compensation: If the Minister is not paid at recommended UUA standards, the Board will review the Minister's salary, housing, and benefits annually, in consultation with any appropriate committee(s), taking into consideration such factors as merit, cost of living changes, benefit cost increases, UUA recommendations across the staff team, and the financial means of the Congregation. Such recommendations will be considered as a part of the normal budgeting process. An increase in the amount of compensation will not alter the other terms of this agreement.

3.4 Intellectual Property: All notes, research, sermons, audio and video recordings, and other products of the Minister's work will be the sole property of the Minister. During the time of this ministry, the Minister

grants to the Congregation a royalty-free, non-exclusive use of sermons and other public pieces created for the ministry.

The purpose of this clause is to supersede the legal default, which is that things created in the course of one's employment are the property of the employer. When the minister departs, the Congregation can ask for permission from the Minister to continue to use products of their work.

3.5 Relocation/Moving Expenses: The congregation will reimburse up to a maximum of \$10,000 in reasonable expenses associated with relocating the Interim Minister to the Congregation. All reimbursements and/or payments of moving expenses will be fully taxable under federal law and may be taxable under applicable state law.

Federal tax law dictates that any direct payment for, or reimbursement of, employee moving expenses between 2018 and 2025 is taxable income and must be reported on the Minister's W-2. The Minister must pay both income and self-employment taxes (15.3%) on this amount. To mitigate the tax burden, congregations are encouraged to "gross up" the moving expense by roughly 35% to cover this additional tax burden. (The gross-up amount is also taxable.)

3.6 UUA Interim Minister's Training: In addition to other employee-related expenses specified by this agreement, the Congregation will pay up to \$1,500 toward the tuition, room, and travel expenses of the cost of the UUA-sponsored Interim Minister's training or UUMA Interim Ministers' chapter meeting.

3.7 Interim Ministry Sabbatical Fund: In recognition and appreciation of the unique work of interim ministry, the Congregation will contribute \$1,000 to the UUA Interim Ministry Sabbatical Fund. Such payment will be made to the Office of Church Staff Finances.

Settled ministers earn one month of sabbatical for each year of service. Interim ministers are devoted to the challenging work of interim ministry, providing not only the full range of ministry, but assisting the congregation in preparing for the next chapter of its history. Many interims serve one or two years at a congregation and then begin again, having to move from location to location. Interims never earn the restorative time away which is a sabbatical. To address this problem, the UUA has established the Interim Ministry Sabbatical Fund. By pooling contributions from congregations served by interim ministers, this fund will enable accredited interim ministers to earn a paid sabbatical after serving as an interim for 6 to 8 years. Retaining qualified interim ministers eventually benefits most UU congregations.

3.8 Review of Compensation: The Interim Minister will consult with the Board and the Ministerial Search Committee on the proposed Settled Minister's salary, housing, and benefits. Such consultation will include trends in ministerial compensation and such other factors as the area's cost of living. This review will also take into consideration how current compensation for the Interim Minister and other staff compares to UUA Compensation Standards. As appropriate, the Interim Minister may request a consultation by a UUA Compensation Consultant to help the Congregation develop the compensation package for the incoming Minister and review salary and benefits for all staff.

During the search process, congregational leaders are often surprised to discover that the salary and benefit expectations are higher than the compensation paid to the previous ministers. Given the UU commitment to economic justice and fairness in the workplace, it is important for congregational leaders to review not only ministerial compensation, but the compensation offered all congregational staff. To find the UUA Compensation Consultant for your congregation, see <https://www.uua.org/leadership/library/compensation-consultants>.

4.0 WORK WEEKS AND LEAVE PROVISIONS

4.1 Work Week: The Minister is an exempt full-time professional and ministry is understood as a calling.

- The Minister and the Board will discuss the broad parameters of the Minister's schedule, understanding that the work of ministry is time-intensive and subject to unforeseen events.
- The Minister is responsible for monitoring their time to ensure an appropriate balance of work and time off.
- It is expected that the Minister will have, at a minimum, one day per week free of all Congregational responsibilities and one additional day devoted to study and writing wherein the Minister will be available only for emergencies.

In their multi-faceted roles, priorities are constantly shifting. Ministers often work evenings and spend time in ways less tangible such as addressing congregational problems. Pastoral and congregational crises can occur at any time including days off. Sufficient down-time is essential to maintaining personal health and professional sustainability. Ministers' work preferences vary widely. It is important for the Board and Minister to discuss work time expectations.

4.2 Availability for Appointments: The Minister will be available for appointments and will inform the Congregation of the way to schedule them.

4.3 Study Leave: In recognition that Ministers need extended time away from the stresses and demands of daily congregational life to deepen their calling and develop their skills, the Minister will have two weeks (or the equivalent number of working days) of study leave per year. The Minister is working during Study Leave. Should a Congregational emergency arise requiring the Minister's return from study leave, all reasonable costs of such return will be borne by the Congregation. Study leave is not paid out upon termination.

Study leave may include, but is not limited to, spiritual retreat, spiritual practices, continuing education, attending conferences and trainings, work-related reading and planning, study groups, writing, pilgrimage, or teaching/preaching at locations away from the minister's primary congregation. Attendance at General Assembly, regional UUA gatherings, UUMA Chapter Meetings and Ministry Days are not part of study leave as they are considered associational responsibilities. Seven consecutive days of leave, inclusive of the minister's regular day(s) off, constitute one full week of study leave. Ministers often choose to take study leave in increments of less than a full week. The two weeks can be broken out into an equivalent number of working days, e.g., 10 days for a 5-day workweek.

4.4 Vacation: The Minister will be relieved of all responsibilities for a total of six weeks (or the equivalent number of working days) per year. Earned, unused vacation time is paid out upon termination.

- Unused vacation can be carried over to the following year, but total vacation will be capped at 6 weeks in any given program year.
- Should a Congregational emergency arise requiring the Minister's return, all reasonable costs of such return will be borne by the Congregation.

Due to the time-consuming and exhausting tasks associated with moving, and the need to attend to one's permanent residence, interim ministers are provided with 6 weeks of vacation and 2 weeks of study leave (rather than the four + four for settled ministers). Note that some interim ministers may prefer to take 8 weeks of vacation in the last year of interim ministry, given relocation demands.

Seven consecutive days off, inclusive of the Minister's regular day(s) off, constitute one full week of vacation. Ministers often choose to take vacation in increments of less than a full week. The six weeks can be broken out into an equivalent number of working days, e.g., 30 days for a 5-day workweek.

Congregational personnel policies should stipulate when and how vacation time is earned.

4.5 Holidays: The Minister is entitled to Holidays (days off with pay) consistent with the personnel Policies of the Congregation. If the Minister is expected to work on a congregationally designated holiday or a holiday falls on the Minister's regularly scheduled day off, another day should be taken off within two weeks of the holiday.

Congregations are encouraged to develop policies which are respectful of cultural holidays that may be observed by their staff.

4.6 Sick Leave: The Minister will be credited with 10 sick days per calendar or fiscal year, on a prorated basis at the beginning of an initial partial year. Up to 10 days of accrued sick leave may be carried forward each year, but the balance may not exceed 20 days. Sick leave may be used for the Minister's illness or for the illness of a family member. Sick leave is not paid out upon termination.

Some states and localities have laws requiring sick leave time. Congregations should consult with their labor attorneys regarding particulars that may apply.

4.7 Extended Medical Leave: Should the Minister suffer an illness, injury, or disabling condition that continues after all accrued sick, vacation, and study leave has been exhausted, the Congregation will place the Minister on "Extended Medical Leave." Extended Medical Leave will not extend beyond the earlier of the commencement of long-term disability benefit or 90 days following the exhaustion of all sick, vacation, and study leave.

- During Extended Medical Leave, vacation, sick, and study leave do not accrue.
- The Congregation will continue to make contributions toward all employee benefits (health, dental, life, long term disability, retirement, and payment-in-lieu-of-FICA) as otherwise provided by this Agreement.
- The congregation will provide 75 percent or more of the Minister's salary and housing allowance.
- If the Minister recovers and is able to return to work full-time before the earlier of the 90-day period of Extended Medical Leave or the commencement of long-term disability benefits, the Congregation will retroactively pay the Minister the difference between 100 percent of salary and housing, payment-in-lieu-of-FICA, and retirement contribution and the amount already paid.

For help finding coverage during your Minister's Extended Medical Leave, contact your regional staff and/or the Transitions Office.

See Section 5 for termination provisions.

4.8 Parental Leave: The Minister may take six weeks of paid parental leave after the birth or adoption of a child. In recognition of individual family needs, the Minister may take some or all of the parental leave prior to the birth/adoption of the child, following the birth/adoption of the child, or partially over an extended period of time during the year following the birth/adoption of the child. The Minister will be expected to communicate the dates of leave to the Board as far in advance as practical.

Given the limited duration of interim ministries, the recommended length of parental leave is only 6 weeks – half that recommended for settled ministries. Leave for family (below) is similarly reduced.

For help finding coverage during your minister's Extended Medical Leave, contact your regional staff and/or the Transitions Office.

4.9 Leave for a Family Member: The Minister may take up to four weeks of unpaid leave when needed to care for a family member (child, spouse/partner, parent, in-law, or other close family member) with a serious health condition. The Minister must use any accrued sick, study, and/or vacation time first. Once accrued paid time off is exhausted, the remaining leave will be unpaid. During periods of unpaid leave, the Congregation will continue to pay all insurance premiums; the minister will pay back their usual share of the premiums by check or payroll deduction within one month of their return. (There are no Retirement Plan contributions when there is no salary paid.)

4.10 Bereavement Leave: Upon the death of an immediate family member (spouse/partner, child, sibling, parent, or in-law), the Minister may take up to 10 days of paid leave. For the death of a family member outside the immediate family, the Minister may take up to 5 days of paid leave.

5. EMPLOYMENT TERM AND TERMINATION

UUA Congregational Life Staff should be consulted early in the process when leave or transition due to conflict, illness, or any other reason may be possible.

Section 5.2 Resignation; Section 5.3 Termination Due to Death and Disability; and Section 5.5 Termination: In determining the duration of benefits, Congregations are advised to consult with the UUA Office of Church Staff Finances since the rules of the various benefit plans (retirement, health, dental, life, and long-term disability) may limit or restrict the Congregation's ability to extend the benefit after termination of employment.

5.1 Term: The Minister will serve the Congregation for a one-year period beginning [date] and ending [date]. The Minister will not become a candidate for the Congregation's called ministry until at least three years have elapsed since the end of this interim ministry. Further, the Minister agrees not to serve the Congregation for more than two years without the approval of the UUA Transitions Director.

5.2 Agreement Extension: If the Board wishes to extend this agreement for a second year, the Board should notify the Interim Minister by March 1.

5.3 Termination by Resignation or Retirement: The Minister may terminate voluntarily by providing 120 days' notice in writing to the Chair of the Board; such termination will become effective at the end of the 120-day period or any mutually agreed upon longer period. The Minister will continue to perform all duties and to provide for an effective transfer of duties during that time. At its option and discretion, the Board may reduce or eliminate the 120-day notice period and provide pay in lieu of notice for duration of time period for which the notice is shortened or eliminated.

The rules of UUA benefit plans limit the Congregation's ability to extend benefits after termination. Contact the UUA Office of Church Staff Finances for guidance.

5.4 Termination Due to Death or Disability

UUA Congregational Life Staff should be consulted early in the process when leave or transition due to serious illness or disability is possible.

5.4.1 Termination Due to Death: Upon the Minister's death, the Minister's beneficiaries will be entitled to receive any death benefits to which Minister is entitled under any insurance plans. In the case of the UU Retirement Plan, participants are 100 percent vested, and beneficiary designations made by the participant are kept on file by the retirement plan Recordkeeper. Earned, unpaid salary and accrued vacation will be compensated in a manner consistent with state law.

5.4.2 Termination Due to Disability: In the event that the Minister is found eligible for long-term disability benefits and/or is absent from work or physically unable to perform duties at the conclusion of the Extended Medical Leave outlined in Section 4.7, the Congregation has the right to terminate the Minister's employment upon written notice to the Minister. The Minister will receive any long-term disability benefits to which the Minister is entitled under any insurance plans. The Congregation's payments for the Minister's

benefits will cease immediately upon termination, but the Minister will receive any vested retirement benefits or insurance continuation rights provided by law, insurance contracts, or plan documents.

5.4.3 [If the Congregation provides a Parsonage, add]: Parsonage upon Minister's Death or Termination Due to Disability. In the event of the Minister's death, the parsonage will be available for continued use by the Minister's family for at least three months on the same financial terms as to the Minister. In case of a termination due to disability, as defined above in 5.3.2, the Minister may remain in the parsonage for three months following notice of termination.

5.5 Administrative Leave/Suspension: The Board may place the Minister on administrative leave, with pay at its discretion, to allow for an investigation of any complaints or concerns.

UUA Congregational Life Staff should be consulted early in the process when leave or transition due to conflict or misconduct is possible.

5.5.1 If the personal or ethical behavior of the Minister results in the Minister being suspended from fellowship by the Ministerial Fellowship Committee, or charges filed by a law enforcement agency, then the Board may suspend the Minister from duties, with or without compensation, until the matter is resolved. If the suspension is without compensation, the Minister may use earned vacation. If the matter is resolved and the Minister is returned to service, then all leave time will be returned to the Minister, and the Minister will be fully compensated for any unpaid time.

5.6 Termination by the Congregation

5.6.1 Negotiated Resignation: The Board may negotiate the Minister's resignation. In exchange for a General Release of All Claims signed by the Minister, the Congregation will pay the financial equivalent of the Minister's unused vacation and continue the Minister's salary, housing, and the Congregation's contributions toward the Minister's insurance benefits, excluding professional expenses, for an additional four (4) months, or until the Minister has begun service in another comparable position, if sooner. The continuation of benefits is subject to the provisions of the various benefit plans.

UUA Congregational Life Staff should be consulted early in the process when leave or transition due to conflict or misconduct is possible.

A General Release of All Claims means that the Minister surrenders their right to sue or to recover any additional amount from the Congregation. Local legal counsel is advised.

Benefits, including Retirement Plan contributions, can continue during an administrative leave. Retirement Plan contributions are *not* permissible on severance pay. Contact the Office of Church Staff Finances regarding benefits continuation options.

5.6.2 Dismissal with Reason: The Minister may be dismissed by the board with less than 120 days' notice and without the severance payments described in this Agreement, if the Minister:

5.6.2.1 is convicted of a felony unless arising from civil disobedience;

5.6.2.2 has their ministerial fellowship with the UUA terminated or suspended;

5.6.2.3 is found by the Board of the Congregation to have engaged in one or more physically or sexually abusive acts toward any person.

5.6.2.4 is determined by the Board to have seriously neglected the ministerial responsibilities under this Agreement, improperly used Congregational funds for personal gain, and/or to have engaged in activities that egregiously violate the UUMA guidelines. Appropriate UUA regional and/or headquarters staff will be consulted before dismissing a minister under the terms of this clause.

5.7 Non-Disclosure/Confidentiality Clause: No non-disclosure and/or confidentiality clause will be included in any negotiated agreement. The Congregation and the Minister agree that the circumstances leading up to a termination need to be understood during the subsequent period of interim ministry and discussed with prospective ministerial candidates.

When a difficult departure happens, it is best if all parties are allowed to share their experience. Either the congregation or the minister (or both) may feel they have been wronged in some way. For someone to be kept from speaking their truth is ultimately more harmful than helpful, and telling one's story can be part of the healing (on both sides). Regional staff and the Transitions Office want to get the best picture possible of how things went off track. UUMA Good Officers can support their colleague's well-being during a contentious departure by listening, witnessing, and offering perspective.

UUMA Guidelines outline appropriate behavior for a departing minister with respect to their communications with congregants. The lack of a confidentiality clause doesn't give the minister blanket permission to share their "side" with the congregation.

From UUMA Guidelines section IV.A.4, regarding future searches following a departure: "Ministers in search should be candid in presenting themselves, past problems and achievements, and the reasons for wanting to serve a new congregation. They should expect the congregation to be equally forthright in its presentation to candidates and potential candidates. Truthfulness is particularly important in the following matters: resources, number of members, financial position and activities, past problems and achievements. The congregation should be completely candid with reference to the previous minister's departure. The candidate should be equally candid."

5.8 No Payment toward Benefits after Termination: Following the Minister's employment termination under Section 5.5, the Minister shall not be entitled to any further pay or contributions toward any insurance or retirement benefits or accrual of earned time except in exchange for a general release of all claims or as required by law.

6. DISPUTE RESOLUTION

6.1 Mediation: The Interim Minister and the Board will seek to resolve any disputes concerning the interpretation or performance of this Agreement or its validity or termination in keeping with UUA Principles and values. In addition, either party may seek mediation over disputes related to job performance or identity-based discrimination. Either or both parties to this Agreement may request the assistance of the UUA

Congregational Life Staff, a UUMA Good Officer, the UUA Office of Church Staff Finances, or a similar resource.

6.2 Arbitration: If an effort to mediate or otherwise resolve a dispute related to this employment agreement or to the employment relationship has been unsuccessful, then one or both parties may seek to solely and finally resolve the dispute by arbitration. Such arbitration shall be the exclusive remedy and will be before a tribunal consisting of one Unitarian Universalist Minister appointed by the Minister, one Unitarian Universalist Minister appointed by the Congregation’s Board, and a third individual appointed by the first two arbitrators. The tribunal will operate under procedural rules developed by the Unitarian Universalist Association’s Ministries and Faith Development staff group. The cost of the arbitration will be split by the Minister and the Congregation.

The Arbitration provision has rarely been invoked, but it remains an important path towards resolving an ongoing contentious issue. It offers resolution without either party turning to the civil courts. The process developed by the UUA is fair, consists of fact-finding, and results in binding resolution of the issue.

7. AMENDMENT AND CHOICE OF LAW

7.1 Amendments: The terms of this Agreement may be changed by mutual consent of the Minister and the Board. An increase in the level of compensation will not alter the other terms of this Agreement. All changes must be in writing.

7.2 Severability: In the event any portion of this agreement is found to be unenforceable, invalid, or illegal, it can be severed, and the other provisions will remain in full force and effect.

7.3 Choice of Law: This Agreement is subject to the laws of the State/Commonwealth of _____ and the bylaws and/or Constitution of the Congregation. It has been drawn, offered, and accepted in the spirit of the Principles and Purposes of the Unitarian Universalist Association.

7.4 Copy: A signed copy of this agreement will be emailed to Transitions@uua.org.

Agreed to this ____ day of _____, 20_____.

For the Congregation: _____, President

Date: _____

_____, Minister

Date: _____

cc: Regional Lead, Congregational Life Staff, UUA
Ministerial Transitions Director, UUA