



## Checklist for Congregational Boards Engaging a Settled Ministry Search

### Before a search begins

- The board president contacts the Transitions Program Manager, [Christine Purcell](#), and the congregation's primary (or regional) staff contact as soon as the need for a ministerial search is known or suspected.
- The board and minister plan to end the ministry well, celebrating their good work together.
- The board president completes the [Notice of Transition form](#) (< 6 months from the end of the current ministry).
- The board reviews the relevant sections of the [Settlement Handbook](#) (through phase two) and [Transitional Ministry Handbook](#), and checks the bylaws for alignment with current UUA search processes.
- Board leadership invites the Transitions Program Manager and/or regional staff to a videoconference call to review the 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 next ministry, discuss ministry search options, etc.
- UUA staff recommends the type or types of ministry searches available to the congregation: contract, developmental, interim-settled.
- The board makes a communication plan to keep the congregation engaged in the transition process and informed about progress (the Transitions Program Manager can help with this).
- The board 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

- The board identifies an interim selection team, which is usually a task force of the board with three to five members (February-April).
- The board sends the Transitions Program Manager the name and email address of at least one of the members of their interim selection team so she can open a congregational profile in the MinistrySearch system (February or later).
- Board members may invite the Transitions Program Manager to a board meeting, meet with her individually or in small groups, or join her weekly office hours to learn or ask questions about the timeline and process of interim search (February-April).
- The interim selection team completes the application for interim ministry through a MinistrySearch profile (between early February and late April). UUA staff will provide feedback on the profile, if requested, before publishing it toward the end of April.
- The interim selection team interviews applicants and recommends an interim minister for the board to hire (May).
- The board enters into an [agreement](#) (contract) with an interim minister (PDF and Word versions available on [transitions webpage](#)).
- The interim search may continue if a suitable match is not made by the first offer date.
- The board schedules a transition interview with regional staff during the last month or two of the ministry. The departing minister schedules the companion exit interview with regional staff, as well.
- The interim ministry begins on 01 August and typically lasts two years.

## During the interim ministry

- Board members may invite the Transitions Program Manager to a board meeting, meet with her individually or in small groups, or join her weekly office hours to learn about the timeline and process of settled search (January or later).
- The board contacts a UUA compensation consultant to discuss compensation and benefits. *There is no charge for this service.*
- The board identifies search committee candidates following or carefully adapting the process in [Settlement Handbook](#) (late winter the year before the ministerial call).
- The board establishes a search committee budget---typically \$10,000 - 18% of projected minister's salary and housing amount (spring after interim ministry begins)
- The congregation votes on the search committee slate at a regular or specially called congregational meeting using the process explained in the [Settlement Handbook](#) (April-June)
- The board signs up for search coaching (April-June). *Coaching is required for the UUA settled search process. It is available at a substantially discounted rate for congregations which contribute to our Annual Program Fund at the Honor level.*
- The UUA transitions team holds a comprehensive overview of the search process via videoconference for board and search committee members each June.
- The board identifies two board members to work with a member of the search committee as the negotiating team, and creates a draft contract for settled ministry in the fall (PDF and Word versions available on [transitions webpage](#)).
- The board lets the search committee 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 Beyond Categorical Thinking workshop led by UUA staff or volunteer trainers (fall). This workshop promotes inclusivity in the search process and in ministry. The search committee will apply for and schedule the workshop in collaboration with leadership. *The cost of this workshop is covered by the coaching fee.*
- The negotiating team works with the settled ministry candidate to reach an agreement on the contract (late March – early April).
- The board participates in candidating week with the ministry candidate chosen by the search committee and holds a congregational vote to call the candidate as the next settled minister on the last Sunday of that week (late April – early May).
- The board submits a Notice of Call to the Transitions Office after a successful congregational vote.

## The start of a new settled ministry

- The new settled ministry begins (August 1)!
- The board participates in a shared ministry start-up led by UUA regional staff (usually fall-winter of first year of settled ministry).
- The board makes sure to budget annually for sabbatical coverage or the next ministry search.

*Complete calendars with precise dates of interim and settled search milestones and deadlines are available on the [transitions webpage](#). Board leadership and search committee members may contact the Transitions Program Manager, [Christine Purcell](#), or the [Transitions Office](#), at any time for assistance throughout the search process.*