

From Starting to Parting

Supporting Religious Education and Music Staff
in Unitarian Universalist Congregations



January 2016 Edition

UUA Professional Development Office

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Part I: Introduction

[Link to Feedback Survey](#)

What is *From Starting to Parting*?

This resource has been created to guide congregational leaders in recruiting, hiring, supporting, and transitioning professional music and religious education leaders.

Religious Education (aka Religious Exploration, Religious Growth and Learning, Faith Development, or Faith Formation) and Music are both core program areas in congregational life. Accordingly, much of the information supplied here applies to both religious educators and musicians. Where appropriate, we offer separate considerations for the two types of positions. Much of the guidance found herein may also apply to other staff positions, especially lead program staff such as a Director of Membership or Social Justice.

Thank you for turning to *From Starting to Parting*. We hope that our advice paves the way for strong, mutually satisfying staff-congregation relationships and helps you facilitate healthy transitions.

How was *From Starting to Parting* developed?

Compiling and writing were coordinated by Jan Gartner, UUA Professional Development Specialist. The general content has been endorsed by the UUA Council on Church Staff Finances, which includes representation from the UU Ministers Association (UUMA), UU Musicians Network (UUMN), and the Liberal Religious Educators Association (LREDA). A number of professional organization leaders, along with UUA staff, reviewed parts of this document and contributed to the content. Special thanks to Richard Nugent and Betsy Gabriel in the Office of Church Staff Finances for sharing their knowledge of sound employment practices. Shout-outs also to Jeffrey Hamrick from UUMN; Kathy Smith, Rev. Jude Geiger, and John Cavallero from LREDA; and Rev. Don Southworth from UUMA – each of whom looked at parts of this document at some stage of completion and offered helpful input. Credit goes to Dori Thexton, on the UUA Congregational Life staff, for planting the seed that a single resource could be developed for application to multiple professional areas. And Rev. Dr. Lisa Presley, also from Congregational Life, offered many wise suggestions for the January 2016 edition.

Much of the material in *From Starting to Parting* has been taken or adapted from:

- [*Music in Our Congregations: A Handbook for Staffing a Music Program in UU Congregations*](#), by Donna Fisher, edited by Kenneth Herman (Published June 2003)
- [*The Search for Religious Education Leadership: Best Practices for Unitarian Universalist Congregations*](#), edited by Pat Ellenwood (August 2001) and revised by Rev. Beth Williams (April 2004).

These previous resources were, themselves, the product of many wise minds and helpful souls. This makes it impossible to individually give credit to the dozens, if not hundreds, of people whose ideas appear in this document. We are grateful to be able to keep their work alive while ensuring that we align with current needs and practices.

Assumptions and Aspirations

We have made some assumptions about your congregation, recognizing that there are exceptions – and also noting that some of these assumptions may feel aspirational at this time.

We assume that:

- Your congregation has a solo parish minister. Lay-led congregations and congregations with multiple ministers may need to modify some recommendations.
- The minister is chief of staff (staff team leader and direct supervisor of lead staff), and the supervisory relationship is healthy and collaborative.
- You view your religious education and music programs as essential ministries that support the overall mission and health of your congregation.
- You expect your religious education and music professionals to lead high-quality programs.
- The staff member is indeed an actual employee, rather than an independent contractor. (An internet search on “Independent Contractor vs Employee” takes you to relevant articles. Congregations have gotten themselves in legal trouble for treating people as “independent contractors” when they should be classified as employees.)
- You are committed to supporting your staff with appropriate compensation, training, supervision, cooperation, and opportunities for continued growth and development.
- You recognize that staff relationships are both contractual and covenantal, and you strive to express the best of your congregation’s values in the treatment of your staff.
- Your program staff are not ordained clergy. A ministerial search process has its own protocol, so if you are considering a fellowshiped minister for your music or religious education opening, you need to become informed about ministerial searches. See [Ministerial Transitions](#).

Best Practices

We hesitate to call our recommendations “best practices” because we recognize that there are few universals. Any given piece of advice may not apply to your congregation or won’t quite feel appropriate for your circumstances. Many times in this resource, you’ll find that we give you questions to consider or alternatives from which to choose, rather than providing a “recipe.” Our best practices tend to be in the form of guiding principles rather than commandments. You might want to consider these “useful practices” or “proven practices.”

At the same time, the recommendations herein come from people who have expertise in their fields and experience with many congregations; our guidance is grounded in important values such as honesty, fairness, and gratitude. While you may find it necessary to adapt and customize the advice we provide, we caution against disregarding it entirely!

We recognize that congregational life and the general religious landscape are changing rapidly – witness the buzz around [Congregations and Beyond](#), [Full Week Faith](#), and [multisite ministries](#), to name a few initiatives. There are major implications for the needs and expectations of our professional staff as we engage new and creative ways of “doing church.” In this time of experimentation and innovation, we may find that some of our tried-and-true benchmarks and best practices need to change. We hope that *From Starting to Parting* leverages the best of our accumulated wisdom while also opening all of us up to new possibilities.

Think Big: Your Congregation's Values and Mission

Your employment practices reflect your values and mission. How you search, whom you hire, how you support your staff, how you deal with difficulties, and how you manage transitions – these are practical applications of your church's values, “where the rubber meets the road.” Staff transitions, in particular, provide great opportunities to revisit and/or recommit to your congregation's mission, and to ensure that staff roles and goals are in alignment with that mission.

Whether you are initiating a search, seeking to better support a current staff member, or managing a departure, we encourage you to take a deep breath and consider all of the ways that your congregation makes a difference to people within and beyond its walls. How do your staff contribute (or have the potential to contribute) to the vitality of your congregation and its work in the world?

A Work in Progress

The original version of *From Starting to Parting* became available in June 2014. This January 2016 edition incorporates a number of minor changes and clarifications, based on user feedback. If you make use of *From Starting to Parting*, please complete [this short survey](#) to share how it was helpful and how we can continue to refine our guidance to make the next version even better.

In the future, we would like to incorporate examples of forms, documents, and practices that are being used well in the field. Let us know (via the survey) if you have resources, templates, or successes to share!

Note that we've included a link to the feedback survey in numerous places throughout the document.

[Link to Feedback Survey](#)

Part II: Search

[Link to Feedback Survey](#)

Support for the Search Process

You are undertaking an important and holy process. We encourage you to use a variety of resources and take advantage of many sources of wisdom. In addition to this guide and the print and online resources mentioned in this document, possible sources of support and guidance include your regional staff, the UUA Professional Development Office, leaders of the UU professional organizations in your area, and professional staff in neighboring congregations.

Search Timeline

Choosing professional leadership is not a decision to be made in haste, so allow enough time for a thoughtful search. Establish a timeline for your search with your desired start date for the new staff member in mind. Give yourself some flexibility within the overall limits of the search and have a contingency plan if a suitable candidate cannot be found in the time allotted.

A large church replacing a full-time professional may anticipate a national search, with preparations for the search beginning a year or more ahead of the planned start date. A local search for a part-time position might take place over two to three months.

In the case of a sudden, unexpected opening, avoid letting a sense of anxiety or desperation get in the way of a careful search. You might consider a short-term hire to help with essentials, buying yourself time for a longer and more thoughtful process. Some congregations choose to hire an acting professional, with the understanding that a more comprehensive search will follow. [See **Special Situations** on page 12.]

When establishing your timeline, consider how much time you will need for the various items below. Not every search follows these exact steps, and your process may not happen in this precise order; this list is intended to give you a general sense of the progression, from initial preparation to finalizing your new hire.

Note that while there is no official calendar for competitive, full-time non-clergy openings, we suggest the following schedule:

- Post position advertisement and description by February 1, with applications due March 1.
- Review applications and do initial screening by mid-March.
- Conclude interviews by early April.
- Extend an offer by mid-April.

Prepare for the Search

- Clarify roles and responsibilities. What is the minister's role? What responsibilities does your board have? What involvement does the Religious Education or Music Committee have? If a search team is being formed, what is the process for that? Is it clear who will make the final hiring decision? [See **Search Team**, page 8.]
- Develop or review the congregation's and the program's mission. [See **Reflecting on Mission and Vision**, page 10.]
- Gather input from groups – large, small, and focus – and key individuals. [See **Gathering Input**, page 9.]

- Clarify or recommit to your vision for the religious education or music ministry in the context of the larger congregation.
- Create the position description or adjust the existing one. [See ***Creating or Modifying the Position Description***, page 17.]
- Confirm the budget for the position – and for the search process itself.
- Identify those who will serve on the search team.
- Update the congregation at regular intervals during the search.
- Develop a packet about your congregation.

Search and Select

- Advertise the position. [See ***Publicity***, page 20.]
- Reply to inquiries and screen applicants.
- Do preliminary reference checks.
- Interview the strongest applicants. [See ***Screening and Interviewing***, page 21.]

Finalize

- Choose the final candidate.
- Complete reference and criminal background checks.
- Adjust the position description.
- Draft the employment agreement. [See ***Employment Agreement***, page 25.]
- Introduce professional to the congregation.

Search Team

Whether and how you choose a search team goes hand and hand with clarifying the charge of the search team. What is the search team for? Will they carry out all aspects of the search? Are they advisory to the minister, helping with tasks as assigned and serving as a sounding board? Who has final authority for hiring? The charge of the Search Team needs to be consistent with your congregational structures and governance.

The Role of the Minister

With respect to ministerial participation, it is essential for all to be clear from the beginning: how are decisions made? Whether or not the minister will be the direct supervisor of the person you hire, the minister has a unique leadership position on the professional team. Often the minister will be front and center in the search process, especially if they are head of staff. We strongly encourage the minister to be an active participant throughout the search process. If the minister is head of staff, they may have the authority for the hire, with the search team functioning in an advisory capacity. Or the minister may be part of the team, with their opinion given special weight in the final outcome.

We've heard of situations in which the minister is given "veto power." We caution against setting up a situation in which a search team could end up disappointed and disempowered by an eleventh-hour rejection of their chosen candidate. Again, clarity from the outset about the minister's role is important!

The Role of the Board

Put simply, the Board of Trustees is the legal face of your congregation, ultimately responsible for everything that happens (especially if something goes wrong). The Board may delegate virtually all aspects of a search, but they should still have their eyes on the process. Unless your congregation has formal policies that specifically entrust all of the details of a staff search to the minister or to a committee, the Board should provide a charge to the Search Team which set limits and parameters,

specifies its expectations for receiving reports, explains when approval for particular steps is needed, and clarifies whether the endgame is to present one finalist or more. Generally, only the Board can enter into a legal contract – again, unless there is a policy stating otherwise. The official hire also comes from the Board, if that has not been formally delegated to a minister or staff member.

The Role of the Personnel Committee (if you have one)

Personnel committees vary greatly from one congregation to another, and not every congregation has one. If you do have a personnel committee, make sure that its role in the search is clearly spelled out so that it does not serve at cross-purposes to other leaders and decision-makers. Personnel Committees (or HR advisory teams) can be of great help with general matters of process and policy.

Search Team Composition

Diverse perspectives are valuable, but avoid feeling the need to form a large team that includes “stakeholders” from many constituency groups; there are ways of getting input from various individuals and groups within the congregation. A smaller team can operate more efficiently, you won’t have to worry about having excluded a key group, and you’ll sidestep the issue of team members believing that their purpose is to represent or protect a particular area of church life. Avoid choosing people who are likely to come to the team with their own agenda.

Selecting Search Team Members

There are a number of possibilities:

- Minister is in charge of search and hand-picks an advisory team
- Minister is in charge of search and uses Religious Education Committee or Music Committee as advisory team
- RE Committee or Music/Worship Committee serves as search team
- Board selects a search team
- The congregation’s Nominating Committee/Leadership Development Team manages the process

Gathering Input

Getting input from those outside of the search team can help guide your process and ensure support for your decisions later. Those most directly involved in the existing religious education or music program may have the most extensive role because of their intimate knowledge of the strengths, needs, and potential of the current program. But your religious education or music program touches (or should touch) the entire congregation! Create opportunities for other individuals and groups to contribute to the process. Consider how you can include thoughts from:

- paid staff
- congregants of different ages: children, youth, young adults, adults, senior adults
- board members
- long-time, respected leaders of the congregation
- new, enthusiastic members
- members active in other ministries, e.g., social justice, membership, finance, worship, adult spiritual development

Real-time conversations are often more useful than written surveys for collecting rich thoughts. Consider hosting small group reflection sessions, meeting with particular committees, and/or offering

one-on-one opportunities to talk. [World Café](#) is a simple, well-liked format for hosting a dialogue with a large group.

However you choose to gather input, we suggest keeping your guiding questions open-ended and “big picture.” Getting into specifics and asking about preferences at this point in the process may close off creative thinking and/or lead to maintaining the status quo.

Once you have summarized your key findings, it is wise to share them with the larger congregation in some fashion, e.g., a newsletter article about key learnings from your World Café process.

Reflecting on Mission and Vision

If your congregation has an articulated mission and/or vision, this is a good time to review it. (Check with regional staff for resources for developing or revising your mission statement.) What implications does your congregation’s mission have for your music or religious education program? How does your current program connect with the overall congregational mission and vision? If your religious education or music program already has its own mission and/or vision, are these aligned with the congregational mission and vision?

You may – or may not – want to wait for your incoming staff member to be involved in formulating a new or revised mission/vision, as well as specific goals, for your program. The important thing at this point is to be as honest and intentional as you can about where you are in the process. To what extent do you already know where you want to go and how you want to get there? Do you expect the new leader to help you discern your program’s future? How open are you to new ideas and vision that the incoming professional might bring?

Resources for guiding mission/vision work include:

- [Philosophy Making: A Process Guide](#): This is a classic resource that offers multiple options for developing a philosophy of religious education in your congregation. (See if you can adapt it for music or other programs.)
- Chapter 7 - Staffing Your Mission in [The Congregational Handbook](#) contains a congregational self-assessment tool that can be helpful in addressing issues of program mission and vision.
- [Appreciative Inquiry](#) encourages a group of people to imagine a collective desired future state. In contrast to traditional problem-solving approaches, which start by naming what’s wrong, AI sessions ask people to recall their most positive experiences, then work with those stories to clarify values and work from what’s positive and life-giving.
- In conjunction with your mission/vision work, it can prove useful to do a “SWOT” analysis, examining the strengths, weaknesses, opportunities, and threats within your program and your congregation. (You’ll find many SWOT analysis resources online.)
- Appendix I, Creating Religious Education Program Mission/Vision, on page 37 – can be adapted for a music program.

Budget

As you begin your search, keep in mind the following expenses:

- **Interview costs:** e.g., phone calls, including reference checks; travel expenses for non-local applicants. Most initial screening interviews can be done through phone or videoconferencing. But an in-person meeting onsite is generally advised for the candidate(s) under the most serious consideration. [See **Screening and Interviewing**, page 21.]
- **Publicity:** newspaper ads, mailings to professional organization members. (Keep in mind the various free publicity options: professional organization websites, district/regional job boards, seminary job boards, etc.) [See **Publicity**, page 20.]
- **Background check:** Your insurance company can recommend a process and a vendor. [See **Criminal Background Check**, page 23.]
- **Start-up Costs:** Keep in mind that you're likely to have some expenses associated with getting your new hire started, too. If you are providing assistance with relocation expenses, that will be a significant one-time cost, but you will probably have some smaller ones, as well – new name badge, for instance.

New Position, Vacancy, or Reconfiguration?

New position

Assess your present and projected needs to determine the nature of leadership your congregation should have now and might expect to have in the future. Your new staff person will be working in partnership with other staff and volunteers. Responsibilities must be carefully described and accountability made clear. Staff are most effective when other staff and volunteers complement their talents.

In a congregation that is creating a new staff position, it is likely that existing staff and/or volunteers have been carrying out programmatic leadership functions. Does your needs assessment point to hiring administrative support or higher-level program leadership? A modest support position may allow volunteer efforts in a small congregation to accomplish a great deal. If you decide on clerical or administrative assistance, be clear about the nature of the position and distinguish it from that of a director-level role.

You may come to the opposite conclusion. That is, in developing a new position, you may decide that the best way to jump-start program efforts is to hire at the highest possible professional level. If funding demands that the position have very limited hours, figure out how to use that staff time strategically.

To determine how your volunteers and staff might work together, consider the following questions:

- What responsibilities are currently being carried out by volunteers?
- Which of these responsibilities might be better handled by paid, accountable staff, and why?
- What new program possibilities would be opened up by creating a staff position?
- What support (such as administrative help) would the new staff member receive from paid staff or volunteers?
- Do you have one or more volunteers currently functioning as unpaid staff? (In other words, do they have the clarity of purpose, the level of responsibility, and the authority and accountability of a staff member?) If so, what are the functional and relational implications of creating a new

staff position? Will you be conducting a full search or renaming the volunteer's role as staff work and offering compensation?

See **Appendix II** for the Sharing Responsibility chart, a simple tool for having a clarifying conversation about who does what. Modify the chart to reflect the programmatic responsibilities in your congregation.

Filling a Vacated Position

Note: If your congregation is replacing a religious educator or musician, an exit or transition interview may provide perspective on the former relationship and practices, thus informing the search team's work. You may have an internal process for such interviews. Some UUA districts/regions arrange for regional staff to conduct exit interviews. [See ***Exit Interviews***, page 34.]

Filling a vacated position after a departure is not simply fitting a new peg into an existing hole. The purpose of gathering input and reflecting on mission and vision is to give food for thought at this important juncture. How might the general scope or specific responsibilities of the position change going forward? Are there areas where greater clarity is needed? New circumstances or desires that point to a different job title? More hours or fewer hours?

You may want to create an interim or acting position in order to give yourself more time to evaluate your needs. An trained interim professional brings expertise in system and change dynamics, and can lend an objective eye to your program and structures. [See ***Special Situations***, page 13.]

Reconfiguration

Especially if there have been significant changes in staff or program, you might want to think about reconfiguring the position. For instance, if you have had a single person as music director and accompanist, this could be a time to consider separating them. If you are hiring a part-time religious educator or youth director and you discover a neighboring congregation also searching, is this an opportunity to consider a shared position? You may also have a current part-time staff member whose hours and scope can be expanded to take on all or part of the responsibilities of the open position.

An ethical note: There are good reasons to split a single position into multiple positions – to get a better match for specific skills, for instance. *Do not* split a full-time or nearly full-time position up into part-time positions in order to avoid paying benefits.

If you need more time to consider and/or evaluate a longer-term reconfiguration, you can hire an interim or acting professional. An trained interim professional brings expertise in system and change dynamics, and can lend an objective eye to your program and structures. [See ***Special Situations***, page 13.]

Special Situations

[Link to Feedback Survey](#)

Interim and Acting Positions

Sometimes congregations do not feel ready to hire a settled professional and may choose to post an interim or acting position. (Note that we use “settled” rather than “permanent.” Nobody is permanent!)

An **interim** professional is typically hired for a period of 1-2 years, for the purpose of providing specialized skills and tools that help a congregation prepare for robust new settled leadership. (The interim also carries out the customary responsibilities of the job.) An interim is generally not eligible to apply for the settled position. An intentional transition period has a shape and momentum that set it apart from time with a settled leader, so a limited-time role helps ensure that the congregation stays focused on its developmental work. This short-term status also allows the professional to shine a light on uncomfortable truths and to work with the congregation in order to effect difficult changes that may be necessary for future health and success. Such efforts could be compromised if the professional were meanwhile “auditioning” for the long-term position.

The UUA’s [Interim Training for Program Professionals](#) is offered online, usually twice a year. This training focuses on systems thinking, staff relations, developmental and process tasks, and leadership models. Contact the UUA [Professional Development Specialist](#) for more information.

While interim work can be useful in nearly any transition situation, congregations with any of these contexts will especially benefit:

- There has been frequent turnover in this staff position.
- The person vacating the position is departing under difficult circumstances.
- The person vacating the position is long-tenured (whether beloved, challenging, or a mix).
- There is the potential for a significantly different scope of work or a new staffing configuration going forward.
- There is a feeling that the program deserves some refreshing or new thinking.

An **acting** position is created when there is reason not to make a long-term commitment to an individual at the time of hire. The focus of the acting professional is carrying out the position’s routine responsibilities. (An acting staff member is not expected to lead the congregation through an intentional developmental process as an interim would.) Reasons to hire an acting professional include:

- The settled professional is away for an extended period (e.g., sabbatical, ministerial internship) and will return at the end of a specified time.
- Someone is interested in taking the position only for a limited period of time.
- You are experimenting with a new staff position or configuration. In other words, the position itself is “acting,” rather than the person, per se.

Congregations often hire an acting professional as a way of establishing a trial period. Our experience is that giving a newly hired professional an “acting” title can be disempowering and will work against that person’s ultimate success. If you are hiring someone with the expectation that they will likely be a good candidate for the position in the long-term, we urge you not to label the position as acting. Set your expectations through the job description and a goal-setting process, ensure regular supervisory conversations, solicit feedback appropriately, and conduct frequent performance reviews for the first

6-12 months to help ensure that your new staff member is fulfilling your needs. [See **Supervision** and **Performance Management**, page 29.]

A frequent question: *“We’re in a ministerial transition period. Shouldn’t we make this an acting position so that our new minister has the chance to get to know this staff member before we make it a settled position?”*

We agree that a new minister doesn’t want to get “stuck with” staff with whom they are incompatible. Musicians and religious educators are key partners of our ordained clergy, and we all recognize the importance of healthy staff relationships. However, just because a new minister is coming doesn’t mean you can’t hire with confidence.

One question to ask yourself is whether your new staff member is in a substantially different position from any other staff member. Frankly, if a new minister is not working effectively with a staff member already in place, it matters little whether that staff member has been there for just a few months or for many years. (The biggest staff-related challenges during ministerial transitions tend to be related to long-tenured staff.) Trust, clarity of expectations, and good communication are key to maximizing the chances that any staff relationship will work. Put the appropriate supports in place for all of your staff and your new minister. Ensure that mechanisms for addressing staff conflict, unprofessional conduct, and disappointing performance are clear.

Again, we recommend not using an acting title in these situations, as this tends to connote “temporary” and/or “auditioning for the job.” One alternative is to hire someone on a one-year contract with the possibility of renewal. Be sure to provide clarity about when and how the decision about renewal will be made.

We recommend that ministers who are new to supervisory responsibilities will seek training and mentorship in this important area.

Inside Candidates and Members as Staff

An inside candidate is one who is already a member or a staff member in the congregation. Examples are an Organist applying for a Choir Director position, the Assistant DRE applying for the Director of Religious Education position, or any member of the congregation applying for an open staff position.

In the ministerial world, the “inside candidate rule” says that a minister who is a member or staff member of a congregation cannot accept a call to a congregation once the Transitions Director has submitted a list of potential candidates. In other words, a ministerial search committee must decide yes or no on an inside candidate before considering other candidates.

Things are not as clear in the world of other religious professionals. For your consideration:

If you have a staff member serving in an acting capacity (but see concerns above about “acting” titles), or in another role on staff, and that person is interested in the position, your options include the following:

- You can make a decision to hire the person for the settled position based on current performance with no further search. This is one reason to have a good performance management system in place – so that you have documentation to help you objectively assess whether this staff member is fulfilling your expectations.
- You can have this staff member apply ahead of any further search process – going through a review and/or interview process much as you would with any other applicant, but making a decision, yes or no, before opening up the process to other applicants.
- You can invite/encourage this staff member to apply during the general application period. Be sure you have clear criteria for making your decision. How can you make the playing field as level as possible, given that one person is a known quantity?
- The staff member may, of course, be discouraged from applying at the onset, if it does not seem to be a good fit. Again, ideally this should be clear from performance reviews or other documentation.

If you have one or more congregants interested in a staff position:

- If you are open to accepting applications from congregants, we recommend granting a preliminary interview to any interested congregant who completes an application.
- You may choose to do an inside search first – effectively invoking the inside candidate rule.
- You may invite interested congregants to apply through the regular search process.
- While you do not necessarily need to create a separate process, do take the time to consider how reviewing materials and interviewing someone involved in your congregation will be different from reviewing others.
- Some congregations have policies that preclude members from applying for staff positions. Others allow staff to apply but make them resign from membership if hired. Still others have no such policies, but guard against the pitfalls through intentional conversations up front about staff boundaries and expectations.
- If you do hire from within the congregation, you can ask the new staff member to sign an additional document that reinforces behavioral expectations, especially with regard to supervision and grievance provisions. Signing the document would indicate agreement with the expectations, including the understanding that failure to abide by them may be grounds for immediate dismissal. Keep in mind that a member on staff will have access to information, and potentially could have concerns/complaints, that cannot be shared with others in the congregation. This can be a great challenge for members who become staff.
- We recommend these 2 articles by UU minister and longtime congregational consultant Rev. Dan Hotchkiss: [Becoming Staff, When a Member Joins the Staff](#).

If staff and/or members of your congregation are invited to apply for a position alongside external applicants, it may be wise to mention this in your public search documents. That helps an external applicant decide whether or not to reach out to the incumbent in their information-gathering process.

In the end, the congregation needs to trust your process. If you offer the position to a congregation member or current staff member without a full search, will congregants feel assured that you did due diligence in finding the best person for the position? On the other end of the spectrum, if you embark on a continent-wide search, do congregants appreciate the commitment of time and financial resources needed to evaluate and potentially hire an applicant from another part of the country?

Whatever your situation, will congregants and applicants alike feel that the process was fair and reasonable?

Perspectives from the field on being staff in one's own congregation

From church members who became staff in their congregations:

“Conducting the choir is simply the very best way I can be of service to my congregation. I went in with the understanding that becoming a staff member brought specific responsibilities and knowing that it would alter my relationship to the congregation. It has been an absolutely wonderful way for me to contribute, practice my craft, and become a valuable part of our overall ministry. Becoming part of the staff has deepened and enriched my connection to this beloved community.”

“As a longtime member, it was a HUGE decision for me to give up my membership when I became the choir director, but I have discovered that my new perspective helps me to advocate for the music ministry and its budget with a clearer vision, observe our church dynamics from a more objective remove, and relate to my fellow staff members and the congregants with better boundaries. For me, the distinction has been very positive. But I *AM* in search for a new spiritual home.”

From a staff member who maintains membership elsewhere:

“I am very clear that the clergy at my congregation do not minister to me, they supervise me! I only get to be at ‘my congregation’ twice a month, but I am so glad to have my own community. There, I am a member among equals, I am not responsible for programming the Sunday morning experience, I receive sustenance, and can critique or enjoy the music, words, meditation just as anyone else does. Although I gain immensely from the services at the congregation I serve, I am certainly almost always aware that I am working.”

Personnel Policies

Hiring a new professional staff member presents a good opportunity to review your personnel policies. For more on personnel policies, including a sample policy, see [Personnel Policy and Fair Compensation for UU Congregations](#). The contract or letter of agreement of an individual staff member supersedes the general personnel policies. It is likely, for instance, that professional staff will have terms for vacation and/or study leave that differ from those found in your general personnel policies. (Reference your congregation's personnel policies in your employment agreement for terms not otherwise specified.)

Personnel policies should include benefits, rights, responsibilities, leave, discipline, evaluation, grievance process, and whistleblower provisions. Each new staff member should sign indicating that they have received a copy of the policies and understand them.

When you are looking at personnel policies and letters of agreement, what you are striving for is equity (fairness). There might be differences, appropriate to the positions, but these differences should not be arbitrary. Some UUA benefit plans mandate that if one staff member participates in the plan, then all staff must be offered the same opportunity.

Creating or Modifying the Position Description

In the words of congregational consultant Susan Beaumont, a position description “holds a set of shared expectations and is a container for dialogue.” A good position description includes:

1. Position Title

A note about the word “Director:” A director-level position implies someone with a high level of authority and autonomy, a staff member who plays a lead role in designing, planning, and implementing a program (in collaboration with the minister, other staff, and volunteers). If yours is not a director-level position, is Coordinator a more appropriate descriptor?

Religious Education Position Titles

- Director of Religious Education remains the most common title (DRE)
- Director of Lifespan Religious Education (includes children, youth, adult)
- Sometimes “Religious Education” is replaced by Religious Exploration, Religious Growth and Learning, Faith Development, or Faith Formation. Each has its own connotation. Which fits for you?
- Coordinator of Religious Education indicates a position with less overall authority and more limited responsibilities.
- Occasionally, a congregation has bestowed upon its religious educator an honorific “Minister” title. Most commonly, this title holds meaning only within the congregation. However, it is possible for a religious educator to complete the ministerial fellowshiping process, in which case the religious educator is a fellowshipped UU minister, recognized by the Association.

See the scopes of work described in [Religious Education Staffing Levels \(PDF\)](#).

Music Staff Position Titles

The following naming conventions and descriptions for music staff are recommended for recognition in the wider community and for consistency across congregations (adapted from *Music In Our Congregations*):

- **Music Director**

Oversees the entire music program. Responsibilities typically involve:

- Accountability for all aspects of the music program and alignment with worship and other ministries
- Directly fulfilling many or all administrative responsibilities – potentially delegating some duties to other staff or volunteers
- Directing at least one musical ensemble and/or fulfilling keyboard responsibilities
- Supervising other music staff, if any, and oversees volunteers

Other titles include Director of Music, Director of Music Ministry, and Director of Music and Arts. If this is the congregation’s only music staff position, the title Music Director is recommended over Choir Director. *See Choir Director Description below.*

Occasionally, a congregation has bestowed upon its music director an honorific “Minister of Music” title. Most commonly, this title holds meaning only within the congregation. However, it is possible for a UU musician to complete the ministerial

fellowshipping process, in which the musician is a fellowshipped UU minister, recognized by the Association.

- **Music Coordinator** – a less frequent staff position. Assumes administrative responsibilities only. May have a variety of duties, but does not direct an ensemble or fulfill keyboard/accompaniment responsibilities.

Such a position can be of value in specific situations where there is a modest or beginning music program, or where there is a volunteer choir director. Hiring a Music Coordinator may help educate a congregation to appreciate the benefits of a broader, more professionally-led music program. In smaller congregations, these duties are often fulfilled by the Music Committee.

- **Pianist/Organist** – or consider **Collaborative Keyboardist/Collaborative Instrumentalist**: may be the Music Director or supervised by same
 - ♫ Planning and performance of keyboard (or other instrumental) music for worship and other services
 - ♫ Accompaniment of hymns and perhaps other ensembles

Occasionally the Choir Director and Pianist/Organist are one and the same. When possible, we recommend that these be two distinct positions, unless the candidate has both the specific training and the desire to carry out both roles.

- **Choir (or other Ensemble) Director**
 - ♫ Direction of Adult, Children's, Handbell, Chimes Choirs, or other musical ensemble in rehearsal and performance
 - ♫ Selection of ensemble music for worship or other services

Occasionally the Choir Director and Pianist/Organist are one and the same. When possible, we recommend that these be two distinct positions, unless the candidate has both the specific training and the desire to carry out both roles.

2. Fair Labor Standards Act (FLSA) Status – exempt or non-exempt?

The FLSA (Fair Labor Standards Act) mandates minimum wage and overtime pay for many workers. It protects the worker. "Exempt" means that the EMPLOYER is exempted from having to pay overtime for certain positions. A few basics:

- Positions considered "professional" our realm are not necessarily exempt.
- To be exempt, a position must meet a minimum salary level; this amount is not pro-rated for part-time positions. (Note: some states set a higher limit than the federal level.) *The salary level has been \$455/week for some time, but a significant increase is likely to take effect sometime in 2016.*
- State-by-state variations in FLSA regulations make this a tricky area. Consult your congregation's legal counsel with questions.

3. Time: Hours or units per week, months/year

Ultimately, clear expectations, two-way communication with the supervisor, goodwill, and mutual trust are necessary ingredients for the success of any method of tracking and reporting time. Some resources for assessing the appropriate number of hours for a position:

- [Religious Education Staffing Levels \(PDF\)](#): *Outlines 3 position breadths: Coordinator, Classic, and Comprehensive. (This document replaces the chart on Page 40 of The Search for Religious Education Leadership.)*
- [UCC Guidelines for the Ministry of Music](#): *See pages 8-14 to help gauge appropriate hours/week.*
- [American Guild of Organists Time Requirements Worksheet](#)

Units: An Alternative to Hours

A unit-based system of measuring hours acknowledges the irregular nature of many professional positions and the difficulty of determining time spent on the job in a congregational setting.

A unit is defined as a morning, afternoon, or evening devoted to a congregation's work. The unit system sets twelve units per week as the standard for full-time service. Units will by no means be consistent in terms of actual time elapsed. Some afternoons, for instance, will be six hours long and others will be two. The unit system allows considerable flexibility on the part of the professional. It should be applied reasonably, considering the subjective nature of working for a congregation.

4. Accountability (reports to):

It is increasingly common for professionals in lead staff positions to report to the minister, who serves as chief of staff. This reporting structure allows a religious professional to be supervised by another religious professional and helps ensure that staff are aligned with respect to larger goals and directions. The supervisory relationship, in the case of professional religious leaders, works best as a collaborative one, with the ministerial supervisor serving as guide, advocate, and partner.

If you choose an alternative to the minister as supervisor, you'll want to ensure that the supervisor understands the supervisory role and is well-positioned to guide and support the staff member. [See **Supervision**, page 29.] It is not appropriate to have a committee supervise an employee. Where there is no minister or the minister is not in a position to supervise, a personnel committee or board chair may be a suitable alternative. (RE and Music Committees exist to focus on and advocate for their programmatic areas. Supervision of the program staff member is not a fitting task, as it can too easily result in conflicts about expectations and needs.)

5. Brief job summary or purpose statement

Describe in a sentence or two the purpose of the job. Why does the job exist?

6. Key Outcomes and Responsibilities/Essential Functions

This should not be a laundry list of every possible task. Name the duties that define the job and the results you expect to achieve. Avoid long bulleted lists. If you are inclined to provide more detail, break this section up into categories, e.g., Program Design, Communication, etc, with short explanations or lists of specifics under each category.

7. Core competencies (skills and personal attributes needed)

8. **Qualifications** (experience, academic)

9. **Working conditions and physical requirements**

10. **Performs additional duties as assigned.** This language is a reminder to staff that they may be asked to take on a responsibility or an assignment that is not specifically articulated in the job description. (When this happens, it may or may not indicate a need to update the job description.)

11. **Equal Opportunity Employer/Non-discrimination clause** – or any exceptions. Note that it is okay to specify that you want to hire a Unitarian Universalist. That is not considered discriminatory for religious organizations. (Depending on the position, this may or may not be important.)

Spelling out essential functions, competencies, and physical requirements is important not only for describing the job but for compliance with the [Americans with Disabilities Act](#).

Be prepared to reconsider and renegotiate the job description with your preferred candidate. You can name particular elements of the job as negotiable or non-negotiable in your job posting. There is a balance to be found between clarity about needs and openness to alternatives. (Although you shouldn't settle for a candidate who can't meet your needs, you may discover that some adjustments to the responsibilities make sense after conversation with your chosen candidate.)

[**When Moses Meets Aaron**](#) (by Gil Rendle and Susan Beaumont) is a good resource for creating job descriptions. (The sub-title refers to "large congregations," but most of it applies to congregations of any size.)

Publicity

Position Advertisement

Separate from the position description is the Position Advertisement. This is your publicity piece – your chance to say why someone would want to work for you! A position advertisement should include:

- Congregational and community context, including "selling points"
- Position highlights, and a link to the complete position description
- Compensation highlights: [salary](#); appealing benefits; [fair compensation](#), if applicable
- Consider including an ideal candidate profile
- Contact for questions/more information
- Application protocol (what to submit, where to send it, application deadline or date for preferred consideration)
- Start date

Where to publicize

- On your website. Be sure to have a prominent mention of your job opening on your main page, with a link to additional information.

- [LREDA](#) and [UUMN](#) websites both have job listing pages and are the primary places that most UU professionals will be checking
- [UUA Job Openings](#)
- Through your district/region (protocol varies)
- Neighboring congregations
- Talk to your regional staff about publicity at the local and district/regional levels.
- Avenues for local publicity vary. Print advertisements tend to be pricy. Some congregations have used Craigslist and Idealist.com with success.

Casting a Wider Net

Depending on your situation, you might consider:

- Local colleges with music and/or education programs
- Area seminaries
- Christian education job boards
- Word of mouth is not to be underestimated! Have a clear process for suggestions from members. (For instance, if a member knows someone, should they send that person the job posting or provide the person's contact info to the Search Committee?)

Additional Ideas

- Talk to the minister and other staff at nearby congregations. It is part of our covenant for congregations to help each other out.
- Create an informational packet, posted online, that includes a letter from the minister, a recent newsletter, faith development program information, photos, and more. (Contact the UUA [Professional Development Specialist](#) for samples.)
- For RE positions, the [LREDA Employment Opportunities](#) page explains how you can purchase a spreadsheet of LREDA postal and/or email addresses for targeted mailings, such as a postcard or letter.

Screening and Interviewing

[Link to Feedback Survey](#)

You put together your position description and advertisement, you publicized, and now you have some applications. What's next?

Confidentiality and Transparency

While names and other specific information about your applicants should remain confidential (and be clear about who info will be shared with), you should still provide regular general updates to the congregation about the search process.

Screening Applicants: Good Practices

Select the most viable candidates from the applications received. Depending on the number and quality of applications, you may eliminate some (or even most) applicants from consideration easily, or you could be in a position to give further consideration to every applicant.

- Don't be too quick to rule people out! Sometimes just the right person will have somewhat different qualifications from what you expected or would ideally want. Also keep in mind that some people present better on paper than others. Unless you are overwhelmed with

applications, try to have at least a preliminary conversation with any applicant who shows some potential so you don't miss a gem hidden in the paperwork.

- If you are open to accepting applications from congregants, we recommend granting a preliminary interview to any interested congregant who completes an application.
- If an inside candidate (staff or congregant) will not be given an interview, you should recognize this as a delicate situation. Show courtesy and compassion by having the minister or Search Team Chair contact and inform the applicant in an appropriately pastoral and grateful manner. Also, make sure that this person hears directly from you (the contact person) before they hear from others.
- Be sure to get back to every candidate who has been ruled out at any point in the process, to thank them for applying. This is common courtesy.

Interview Process

Often, an initial interview is done by phone and/or videoconference with all reasonable candidates. Then in-person interviews are conducted with the strongest ones. You may have more than one round of phone and/or in-person interviews (with different interviewers or the same ones).

Occasionally there is a very clear first choice – or only one candidate who seems viable. In such cases, especially if significant travel costs are involved, it is fine to bring in your top choice for a final in-person interview and to hire without doing other final-round interviews. Be ready to bring in others, however, if it seems prudent or becomes necessary.

When conducting an interview, you want to find out:

- Is the applicant capable of doing a good job? (This is usually the main focus of the initial phone interview.)
- What unique strengths and/or ideas might the applicant bring?
- What are the applicant's growing edges and/or are there any red flags?
- Would this person bring skills and a style that complement those of other staff? Would they offer something special to the staff team and the congregation?

You also want to:

- Be clear about the general needs and priorities of the position.
- Talk about the congregation and the program. (What's going well? What are you excited about? What are the challenges? If there are difficulties, speak about them honestly.)
- Answer the candidate's questions.

The best interviews feel like conversations, with each party eager to learn from the other. While you are interviewing candidates for the job, the candidate is also trying to assess the situation. You may want to start the interview by saying a few things about the congregation and the position.

Interview questions should connect, in some way, to the expectations of the position. There are a few basic kinds of interview questions, and you'll probably mix and match:

Traditional questions (often focus on the ability to do the job and general motivations)

- What excites you about this position?

- What are the greatest strengths you would bring to this position?
- What kind of support do you expect, or what do you anticipate needing in order to be successful?
- (For non-UU's) How would you go about learning more about Unitarian Universalism?

Behavioral Questions (will speak to the candidate's work style and values; provide detail about how they've handled situations encountered in the past)

- Tell us about a time when you had to deliver difficult news to someone.
- Describe a situation in which you helped people with conflicting needs find a compromise.

Situational Questions (give you a sense of their approach to situations you think they are likely to encounter)

- What would you do if your keyboardist routinely arrived unprepared for rehearsals?
- Let's do a role play. I'm the parent of a middle-schooler and you're the new DRE. "Pat used to love coming to church, but now it's just a fight every week. I keep hearing how boring the curriculum is."

Other Interview Ideas and Tips

- Ask the candidate ahead of time to come prepared to tell a Story for All Ages, to sight-read a piece on the piano, or to teach the choir (or a subset) a piece of music. *If you are introducing a finalist to anyone beyond the search committee, the candidate should know ahead of time, and proper steps should be taken to guard the confidentiality of the process.*
- A question list drawn up in advance is a great starting point. But give yourselves permission to ask follow-up questions, to re-phrase questions, to abandon a line of questioning that isn't feeling fruitful, or to veer from your interview script and let the process be more organic.
- Be attentive to the candidate's level of preparation. Did they mention having noticed something interesting on your website? Did they come with good questions of their own? These are signs of an employee who will take initiative on the job.
- For finalists interviewed onsite, a casual tour of the facility will be helpful to the candidate and is likely to spur useful questions and interesting conversation. A tour offers a less formal environment, which may help put the candidate at ease before the interview.
- If the applicant is not UU (more often the case for music positions), provide enough information and ask the right questions to be assured that there is a comfortable values match and an understanding of worship/program needs that are specific to building UU identity.
- Steer clear of illegal questions, such as asking about age or marital status. (It is permissible for a religious organization to ask relevant questions about the candidate's religion.)
- In wrapping up, "sell" your congregation and the position, thank the candidate, and share your timeline for decision-making.

Reference checks

Checking references is an important part of any hiring process. While references checks are sometimes done as a final step before an offer is extended, you may find it useful to check references for multiple candidates under consideration. Especially if you find yourself with more than one excellent candidate or if your team is not unanimous in its top choice, consider what you really want to know and reach out to references who may be able to help you fill in some blanks.

See [Reference Checks](#) on the UUA website.

Criminal Background Check

Conducting a background check is advised – and is crucial for any staff member who will work with children or other vulnerable people, and/or those who handle money or finances. Be sure that the specific type of background check you get matches the responsibilities of the job. (For instance, if the job requires driving, make sure to check for a valid license and clear driving record.) Your congregation’s insurance company can provide further guidance.

Normally, an offer is extended to the chosen candidate and, if accepted, it is contingent upon a successful criminal background check.

See [Responsible Staffing](#) on the UUA website.

Note that the UUA has an arrangement with [Oxford Document Management Company](#).

Making an Offer

Once you’ve identified the candidate you want to hire and have gotten agreement from necessary parties, extend the offer – by phone, if possible.

- Make the offer contingent upon a successful criminal background check.
- Have the details of compensation and benefits, start date, etc, ready to discuss.
- Be prepared for possible negotiation of terms.
- If the candidate needs time to consider, see if you can clarify anything or speak to any sources of hesitation. Agree on a day by which you will hear from them.
- Follow up with the offer in writing.

Other Candidates

Inform other candidates once they are no longer under consideration, thanking them for their interest and wishing them well. A phone call (rather than an email) is appropriate for any candidate who was given an interview. If a candidate wants to know why they weren’t chosen, you are not required to say more than the generic “We chose the person who we felt would best met our needs.” In a situation where feedback feels appropriate, keep it clear, simple, and genuine.

As stated in the “Inside Candidate” section, anyone applying from within the congregation deserves special handling when they are being told that someone else is getting the job. Too many congregations have lost loyal members and dedicated volunteers who were crushed not to be chosen for a staff position. Whenever there is a previous relationship with the candidate or the likelihood of ongoing contact, do manage the communication with extra care. (For instance, you might be interviewing the DRE from a neighboring church.)

PART III: Starting Well

[Link to Feedback Survey](#)

Longtime Liberal Religious Educators Association (LREDA) leader Pat Ellenwood reminds us: *Start as you mean to continue.*

Finalize Position Description

Reviewing and adjusting the position description happens in conversation with your new hire. Depending on your congregation's structures, the process of finalizing the position description may be done by the minister or by the Board or its representatives. Regardless of who takes on this responsibility, the supervisor and the Board should approve the final version. (Remember, the Board is the ultimate fiduciary.) Ensure that the overall responsibilities are appropriate for the hours compensated. And, since that there is often more to be done than can be attended to in a given week, month, or year, recognize up front that it will be important to establish priorities.

Employment Agreement

The employment agreement is a binding document to which the position description is attached. The congregation and the professional are bound by the conditions of this agreement. Terms outlined in the Employment Agreement commonly include:

- **Accountability** (reporting relationship)
- **Evaluations:** nature and frequency [See Performance Management, page 26.]
- **Start date/Duration of position:** starting date, ongoing or limited time, with or without option to renew.
- **[Starting salary](#)** and process/time increments for increases
- **[Benefits:](#)** outline employer-paid benefits (e.g., health insurance, pension)
- **Moving expenses**
- **Work hours:** include clarity about onsite time versus working remotely, days off, number of Sundays off. For musicians, have a shared understanding of how practice time is taken into account.
- **Working conditions:** spell out what's provided (e.g., office, computer, administrative support)
- **Continuing education provision:** study leave (annually), sabbatical time (generally on a 5-to-7 year cycle), expectations of time away for professional development and participation in denominational activities
- **Professional organization membership:** Include the expectation that the staff member be a member in good standing of their professional organization. This ensures that they are bound by their organization's code of conduct and gives them access to resources, a listserv, and Good Officers (colleague outside of the congregation trained to counsel regarding professional concerns).
- **[Professional expense allowance](#)** (amount or percentage of salary, include expectation of professional organization membership and participation)
- **Time off:** provisions for vacation, sick and personal time, family leave. *Note: for provisions that are consistent with your congregation's personnel policy, you can reference the policy.*

Other terms may be particular to the agreement with the professional. (The terms of the employment agreement supersede those of the personnel policy.)

- **Intellectual Property:** Generally language such as, “All products of the professional’s work shall be the sole property of the professional.”
- **Professional conduct:** agreement to abide by the appropriate professional organization’s code of conduct, expectations of collegial relations with other staff
- **Departure/Termination clause:** How much notice needs to be given for one party to terminate the agreement?
- **Reference to Personnel Policy** for items not otherwise stated

Often found in musician agreements:

- **Use of Facilities:** congregation allows use of church facilities and instruments for personal practice, for teaching, and for recitals, subject to availability. (It’s a good idea to include specifics about how scheduling is arranged and what happens in case of space conflict.) If the musician takes advantage of this type of arrangement, they should be required to carry their own liability insurance.

UUA and Professional Organization recommendations regarding contracts and benefits can be found at these links:

- [Fair Compensation Guidelines](#) from UUA Office of Church Staff Finances
- [LREDA Guidelines for Professional Religious Educators](#)
- [American Guild of Organists Model Contract for Church Musicians](#)
- [Joint Recommendations on Ministerial Agreements: UUMA and UUA Transitions Office](#)

Announce and Prepare

Before announcing your new hire, be sure that the agreement is finalized and that all other candidates have been notified that they were not selected.

When it’s time, let the congregation know about their new staff member through every communication vehicle you have: newsletter, pulpit, website update, bulletin board, etc. Consider including a quote from your new hire and/or something special you learned about them through the search process. Whether your new staff person is starting the following week or not for a few months, it’s not too soon to build a sense of anticipation. Send the newsletter announcement and/or pulpit remarks to your incoming staff member as a way of letting them know that you are excited to welcome them!

Other preparations

- Be sure to update your website with the new staff member’s name, headshot, and contact info before they arrive. Set up church email account, if applicable.
- Find out how you can be helpful, especially if they are moving from another location.
- Make the office space inviting: remove personal items and nameplate of previous staff member. Tidy the desk area. Leave something welcoming on the desk.

- Remind other staff and key lay leaders of your staff member's first day on the job. Encourage people to help welcome your new hire (by sending an email or introducing themselves in person).
- Remind your new staff member of anything they'll need to know or bring for their first day of work. (Where to park, which entrance to use, paperwork needed, etc.)

Resources

[Living Our Vision: The Congregation as a Responsible Employer](#), UUA HR Director Rob Molla et al, PowerPoint slides from UUA General Assembly 2010 workshop. Get off to a good start. All kinds of HR wisdom about recruiting and hiring.

[10 Essentials for Managing Congregational Human Resources](#), with Rob Molla, a UUA MidAmerica Region webinar. Covers personnel files, job descriptions, personnel policy manuals, handling terminations, and a variety of legal issues.

Welcome

Onboarding refers to welcoming and orienting a new staff member. This will vary by situation, but most of these should happen within the first few days:

- Introducing the new hire to other staff and key lay leaders
- Taking care of paperwork for tax/payroll purposes
- Providing personnel policies and information about your congregation
- Providing keys, explaining the copier and phone system, etc.
- Providing contacts for area professional organization leadership
- Providing information about computer (if provided) and internet usage, passwords, etc.
- Initial conversation with supervisor about goals and priorities, working styles, office hours, supervision meetings and staff meetings

Ritual

Introduce a new staff member to the congregation by way of a special ritual during worship.

Re-launch the Staff Team

When any member of a staff team turns over, you are, in a sense, starting fresh with a new team.

Some ideas for re-launching your team:

- Consider having a staff retreat, especially if you haven't had one for a while.
- Extend your next staff meeting, or have a staff lunch, to make time for some sharing that helps orient the new hire to the team.
- Does your staff have a staff covenant? Take this time to revisit it together. Your new staff member may have questions. It may be a time for amendments or a re-write.
- Have a conversation about how each staff member supports the congregation's mission and vision.

Establishing Staff Identity

In some districts and regions, field staff or adjunct staff lead start-ups for new staff (a few weeks to a few months after they start). In the absence of, or as a complement to, such a start-up process, you may come up with your own unique way to help your new staff members understand how they fit into the life of the congregation – and to help congregational leaders appreciate the roles and

responsibilities of the staff. Especially if your new hire is not already a seasoned religious professional, the supervisor should provide guidance and resources about self-care and professional boundaries. Direct your staff member to local counterparts and the appropriate professional organization.

Part IV: Supervision and Staff Teams [Link to Feedback Survey](#)

Staff Teams

“A Team is a small number of people with complementary skills, who are committed to a common purpose, performance goals, and approach, for which they hold themselves mutually accountable.”
From Katzenbach, JR and Smith, DK (1993), The Wisdom of Teams

Whether your staff consists of two or three part-timers or a dozen or more full-time professionals, staff members have a unique relationship to the congregation that is distinct from that of volunteers. Cultivating a sense of team can help ensure that staff understand their role and feel supported in carrying out their responsibilities with an appropriate sense of accountability, boundaries, and identity.

Supervision

It is increasingly common for the minister to serve as head of staff. Supervising by committee is discouraged. While some may think of the supervisor as “someone who bosses you around,” this is not the essence of the supervisory relationship! A strong supervisor will:

- Meet regularly with their direct reports
- Set clear expectations, hold the staff member accountable to them, and help prioritize
- Serve as a sounding board, acknowledge challenges, provide guidance, and assist with problem-solving
- Advocate for their staff’s needs
- Ensure that staff are aligned and working toward common goals (rather than pulling in different directions)
- Provide ongoing feedback (with the formal evaluation process assuring regular documentation): recognizing and applauding success and improvement, and discussing and documenting performance problems
- Encourage professional growth and good self-care

Performance Management

Performance management should not revolve around a once-a-year annoying form to fill out! It should be an ongoing process grounded in right relationship – a cycle of goal-setting, prioritizing, monitoring, adjusting, and feedback.

Good performance management includes:

- **looking back** (discussion of progress/performance with respect to responsibilities, core competencies, individual and team goals, congregational mission)
- **looking ahead** (new goals, position description adjustments, learning opportunities, project interests, career goals)
- **looking around** (attention to alignment of individual goals and contributions with staff team and congregational goals)

Personnel decisions and issues, especially discipline or termination situations, should not be discussed openly in the congregation. This safeguards the privacy of the individual and also protects the congregation from a lawsuit. The congregation does not have a “right to know.”

Your congregation may or may not have a personnel committee. Personnel committee responsibilities vary greatly from one congregation to the next. If you have a personnel committee, make sure its function is clear and avoid any role conflict with the supervisor or board.

Similarly, clarify the role of the RE or music committee. While these committees generally would not own the performance management process, they (or the chair) may be given the opportunity to provide input.

Staff Team, Supervision, and Performance Management Challenges

This is by no means an exhaustive list, but here are some common challenges:

- Under-performing, misbehaving, or poor-fit employees
- A minister who lacks skill in, and/or de-prioritizes, supervision and staff team leadership
- Limited face time with part-timers which makes it hard to build relationship/sense of team
- Power struggles, which take many forms. *Note: a congregation with authority “issues” inadvertently sets the stage for tension between minister and staff.*

Sometimes it can be hard to identify the problem, much less address it. Some general strategies and tips for ministers and staff alike:

- Keys to successful relationships are trust, role clarity, and good communication.
- Ensure that expectations for staff are clear.
- Seek training and resources, including opportunities for shared learning (staff common reads and discussions, attending workshops as a team).
- Make use of mentors, coaches, and professional organization Good Offices.
- Appropriately claim and yield authority.
- Stay alert and open to creative staffing options and innovative ways of building the team.
- Be authentic, humble, self-differentiated, and respectful.
- See [LREDA/UUMA/UUMN Task Force for Excellence in Shared Ministry Final Report](#), especially pages 12-14.

Resources for Supervision and Staff Teams

[*When Moses Meets Aaron*](#), by G Rendle, S Beaumont, 2007, Alban Institute.

Note: the sub-title refers to large congregations, but most content is very relevant to any congregation large enough to have a staff. Great resource for all aspects of staffing, hiring, supervising.

[*Rivals or a Team? Clergy-Musician Relationships in the Twenty-First Century*](#), by Eileen Guenther, 2012, Morningstar Music. *A comprehensive, intriguing look at this key relationship – problems, success stories, strategies. UUMN Good Officer common read and required reading for Music Leadership Certification Program candidates in 2013.*

[*30 Markers of Staff Team Health*](#), article by Susan Beaumont
Beaumont examines the duality of accountability and collaboration and presents 30 markers. One way to use this article is to have each staff member individually assess the staff team on each marker. Discuss as a team to get a collective sense of where you agree and where you see things differently.

[Teams and Performance](#), article by John Wimberly

Explores why team performance is at least as important as individual performance.

[LREDA/UUMA/UUMN Task Force for Excellence in Shared Ministry Final Report](#), April 2013.

Observations, best practices, and recommendations for future learning opportunities.

[Resources for Collaborative Leadership](#), compiled by the Shared Ministry Resource Team, which included UUA staff and members of LREDA, UUMN, and UUMA. 2015.

Part V: Departures

[Link to Feedback Survey](#)

Why Staff Leave

Among the many reasons that a staff member may leave a position are:

- Retirement
- Getting fired
- Family reasons
- Illness
- Death
- Need better compensation
- Move away from conflict
- Lured by another congregation
- Choose to do something else
- New congregational needs arise – and are noticed

On top of managing the “logistics” of a staff member’s departure, you will need to manage the emotional component. Congregants may have a whole range of feelings and reactions. It’s important to acknowledge all feelings.

Voluntary Resignations

3 “C’s” for a good parting

Closure: *Providing a sense of finality to the relationship for staff member and congregation*

- Ritual during worship – sometimes done in “passing the torch” style if successor is available
- Newsletter article written by the staff member (highlights of their time on staff)

Celebration: *Honoring the departing staff member through a special event*

- Appropriately scaled
- Meaningful to the individual and the congregation

Covenant: *Agreeing on the nature and limits of any ongoing relationship with the congregation*

- With successor and/or with congregational leadership
- Protects congregational health by confirming understandings and setting boundaries
- The [LREDA Code of Professional Practices](#) and [UUMN Code of Professional Practices](#) spell out expectations for a departing professional. (See “Colleagues” section.) These expectations may be a starting point for a covenant. At this time, neither LREDA nor UUMN requires staff to completely remove themselves from congregational life and relationships upon resigning from their staff positions. However, it is often advisable for the staff member to disengage from the congregation for some period of time. (Of course, this is a choice that some staff members make without any prompting.)

Another C: “Complications” – A Few Common Complications

- Even if a resignation is voluntary, the departing staff member might be leaving under a cloud or with a grudge. Congregants are aware. There is discomfort.

- Professionals have been seeking wisdom from colleagues that address what to do about their Facebook “friends” in the congregation.
- A staff member hired from within the congregation may plan to remain involved the congregation in some fashion, or may have children or a partner who continues participating.

Hard and fast rules are hard to come by in such situations. Thinking through the 3 C’s of closure, celebration, and covenant should prove helpful. In the case of a strained departure, for instance, there are still congregants who loved and appreciated the staff member and want the chance to honor the relationship. What is the best way to make that happen? Just as when you are hiring or managing performance concerns, how you handle departures is a time to put your values into practice.

Involuntary Departures

Involuntary departures may occur due to:

- Budget constraints that necessitate eliminating or reducing a position
- Unsatisfactory performance
- Misconduct

Handling such departures fairly, compassionately, and elegantly will minimize congregational anxiety and can allow you demonstrate the best of your values. Richard Nugent, Director of the UUA Office of Church Staff Finances, provides suggestions for these difficult situations:

Topic: Staff Departures – Handling Resignations, Negotiated Resignations, Layoffs, and Terminations (February 2013)

Question: What best practices does the Office of Church Staff Finances suggest to congregational leadership when facing staff departures?

Having to end the employment relationship of a staff member is never easy. It often is emotionally charged for everyone involved – certainly the employee who is leaving, but also those involved in the decision as well those in the congregation who work with the departing staff member particularly if the individual is a member of the congregation or have been on staff for many years. This FAQ addresses issues associated with involuntary separation as opposed to voluntary resignation or retirement. While every situation has its unique characteristics, the Office of Church Staff Finances offers the following suggestions.

1. **Supervision:** Supervision varies widely in Unitarian Universalist congregations ranging from minister as chief-of-staff to supervision by committee. Some congregations have personnel committees and detailed personnel manuals/policies, while others do not. For those not having a personnel manual, the Office of Church Staff Finances can provide a sample to help you develop your own.
2. **Prior to deciding to end an employment relationship:** Job expectations, including a detailed position description, should be clearly communicated to the employee. A process of formal and informal feedback and evaluation is essential including an annual performance review. If additional skills are needed, training should be offered. Deficient performance should be conveyed, in writing, to the employee. In deciding to terminate employment, congregational leaders must weigh the benefit of a new employee who is a better fit with the potential of injecting serious conflict into congregational life that will distract from mission.

3. **When deciding to end an employment relationship:** Good Process is essential. Those responsible for the decision need to be clear about the reasons for separation, decide about severance, and develop a plan on how to communicate the departure to others. Does the individual have a contract or letter of agreement? If so, what does this document say about termination of employment? Is employment in the congregation “at-will”? Are there any state or federal laws that need to be considered? It is wise to consult with an attorney specializing in employment law. The attorney can help the leadership prepare an agreement specifying the terms of separation. It should address severance, restrictions on discussing the matter with others, and a provision waiving all legal remedies against the congregation. The employee might have access to a “good offices” colleague. If so, s/he should be welcomed into the process. If the individual being terminated is a religious educator or musician, you might consider contacting Jan Gartner, UUA Professional Development Specialist, by email at JGartner@uua.org or by phone at (585) 301-6782. A separate FAQ is being prepared on ministerial terminations. In the meantime, you should be in communication with the Reverend Keith Kron, UUA Transitions Director, by email at KKron@uua.org or by phone at (617) 948-6409.
4. **Severance:** Congregations are exempt from paying into state unemployment insurance funds in most states. This means that their staff are at a particular disadvantage when they are involuntarily separated from employment – there are no weekly unemployment benefits. In deciding whether and how much severance to offer, our UU values call upon us to ask how we would like to be treated in similar circumstances. Congregational leaders should consider the severance policies that exist in their own workplaces. There are tax implications regarding severance agreements. These issues, including COBRA coverage of health insurance, need to be fully researched in shaping a severance agreement. Most important, congregational leaders should take into account the length of time the individual has served the congregation AND the length of time that the individual may need to find another position. This is particularly true for religious professionals who are committed to serving UU congregations. Religious Professional positions (Ministers, Religious Educators, and Musicians) tend to be advertised only at specific times during the year with start dates during the summer.
5. **UUA Recommendations:** It may be helpful for you to know how the UUA National Office handles severance. Severance decisions depend upon the reason for an employee’s involuntary separation: There are numerous reasons for involuntary separation including: reorganization or reduction in force, the inability to satisfactorily perform one’s job, or misconduct.
 - a. **Separation unrelated to performance:** The UUA provides one month of severance for each year of service, prorated, up to a maximum of six months’ pay, with a minimum payment of two months. Accrued vacation time is paid as well as one additional month of employer-paid health insurance, if eligible, and elected pension and life insurance benefits do not continue.
 - b. **Separation related to performance:** When an employee is dismissed for unsatisfactory performance, the UUA pays one-half month severance for each year of service, prorated, up to a maximum of six months pay, plus any accrued vacation time. Pension and life insurance benefits do not continue.
 - c. **Separation due to misconduct:** No severance is paid when an employee is dismissed for serious misconduct.

In addition, the Unitarian Universalist Ministers Association (UUMA) and the Liberal Religious Educators Association (LREDA) offer recommendations regarding severance.

6. **Communications Strategy:** The congregation, as employer, is at a disadvantage when dismissing an employee since it must respect confidentiality. Yet the departing employee may disseminate his/her “side of the story” within the congregation in the absence of a legally-binding non-disclosure agreement. In either case, it is important for the leadership to develop a communications strategy. Who will feel blindsided by not hearing the news of the departure from the leadership first (committee members, parents, frequent volunteers, etc.)? How shall the news be transmitted? Snail mail is preferable over email. Does the congregation have an open forum email list? Are the ground rules sufficient to prevent defamatory/destructive email threads? And don’t forget to think of the remaining members of the staff who undoubtedly have more nuanced views. Ideally, the departing individual can be brought into the conversation about how to communicate their departure to key groups within the congregation. This is not always possible, but it is the preferable path.
7. **Organizational Safeguarding:** Whether employment should be terminated immediately, or after a few weeks or a month depends upon the circumstances. Computer files and records that are critical to the congregation need to be safeguarded. Computer files should either be copied or passwords changed to ensure safekeeping. Building keys need to be returned and/or numeric keypads recoded. Of course, it is reasonable to expect that the departing employee will have some personal documents on their workplace computer. Arrangements should be made to copy those documents on behalf of the employee.
8. **Final Thoughts:** The dismissal of an employee is difficult for all concerned, but most so for the employee. While the employing congregation may be disappointed with the employee’s job performance or financial pressures may necessitate lay-offs, the employee faces economic uncertainty without the federal safety-net of unemployment benefits. Our Unitarian Universalist values, grounded in the inherent worth of the individual and compassionate in human relations, challenges employing congregations to treat the departing employee as we would like to be treated – which is consistent with our understanding of interdependence.

The above information is provided to assist congregational leaders in their decision-making. However, the staff of the UUA Office of Church Staff Finances are not attorneys, and we encourage congregations to seek the services of their own legal experts in dealing with unusual cases or individual circumstances.

For follow-up questions, contact:

Reverend Richard Nugent
Director, UUA Office of Church Staff Finances
RNugent@uua.org

Exit Interviews

The sharing of honest and constructive feedback about one’s experience as a staff member may be beneficial both for the staff and for the congregation. For the professional, this opportunity to reflect may offer insights into one’s goals for professional development and future vocational choices, and can also help with closure by helping the person form and articulate their perspective. For congregational leaders, the feedback can be used to strengthen the program and inform the search process for the successor. District/regional staff may conduct exit interviews in order to collect information over time about the congregation.

Exit interviews can be done through an internal congregational process and/or can be facilitated through district/regional staff. Sometimes an exit interview is a written survey, and other times it is a real-time conversation.

Typically an exit interview asks the staff member about such things as:

- Their most significant accomplishments
- What has felt most fulfilling about the work
- Their disappointments and frustrations
- Working relationships with minister, board, other leaders/groups
- Status of the program upon departure
- What they will be doing next

Generally, the departing staff member is asked with whom the interview notes can be shared.

Retirement

Much of the information on the UUA website about [retiring from the ministry](#) applies to non-clergy professionals. Note that professionals who have completed the UUA [Religious Education Credentialing](#) or [Music Leadership Certification](#) programs are recognized in [UU World](#) and at the General Assembly [Service of the Living Tradition](#) (RECP Credentialed and Master Levels).

Emeritus/Emerita

There are many wonderful, meaningful ways of honoring a staff member for their long and praiseworthy service. Emeritus and Emerita designations are much less common for non-clergy professionals than for ministers. At this time, we do not have clear recommendations about best practices for awarding this designation to religious educators or musicians. If you are considering this option, do some thinking about what you hope to achieve and what the expectations and responsibilities of your departing professional would be. We recommend that you seek guidance from your regional staff.

Appendices

[Link to Feedback Survey](#)

Appendix I (from pp24-27 of *The Search for RE Leadership*)

Creating a Vision/Mission for Religious Education Based on the Overall Mission of the Congregation

Large Groups

1. Post four large pieces of newsprint with each of the questions found below posted on a separate sheet.
2. Have several markers in different colors for individual group responses. Use a dark color for group recording.
3. Post the congregation's mission statement prominently in the room or have a copy for each person.
4. Break the group into triads. This part is not a conversation but a series of questions and short answers written down by the recorder exactly as the person answers.
 - One person is an interviewer and asks the question exactly as it is written below.
 - One is interviewed and briefly answers each question
 - One is the recorder, who writes down exactly what each person says in response.
5. Rotate the roles so that each person interviews, is interviewed, and records.
6. The Interviewer asks:
 - What do you want from the religious education program?
 - What talents do you want to give to religious education?
 - What do you want religious education to mean to the church?
 - How does religious education fit in to the larger mission of our congregation?
7. Each triad reads in turn the responses of their group and decides on a best answer, which is then written on the newsprint in the assigned color.
8. Using the newsprint material as raw material for the vision statements, each individual then writes a one-sentence vision/mission statement that expresses his/her view on the reason for the existence for religious education in the congregation.
9. People pair up and, using what they have just written, create one unified vision statement.
10. Each pair joins another pair, and the four-person group creates a unified statement.
11. Each group of four joins another group, and the eight-person group writes a final statement.
12. Everyone looks at the final statement and using a different colored marker, each person underlines what they like and adds what is not there.
13. Using the final statements of the previous groups as the basis, write a final statement.
14. One Final Look!
 - Is our vision related to our mission?
 - Does our vision for religious education reflect who we are as a congregation?
 - Have we identified who is included in our vision?

Small Groups

This process involves meeting in small groups of ten to twelve. These may be homogeneous based on committee affiliation, age, longevity in the congregation, or those identified by a particular area of interest. All meetings should begin with a reading of your mission statement and follow a format like the large group format, which employs pairs and whole group discussion with results recorded on newsprint.

Use the following questions:

- What do you see as the purpose of RE?
- How does the RE vision/mission fit in with the mission of our church as a whole?
- What are the strengths of our program?

- What do we want to add and improve upon?
- What would you like to read in the paper about our religious education program?
- Is Sunday morning the only time for religious education? What other possibilities are there?

Or:

- How would you define religious education?
- What attracts you most about the current program of religious education?
- What insights do you have as a result of your experiences with children, youth, and adults?
- Reflect on what you know about the history of the RE program in this congregation.
- What is your view of the optimal relationship between/among the professional staff?
- What role does religious education have in fulfilling the mission of our congregation?
- What contributions can you make to fulfill the congregation's mission?
- What changes do you think would strengthen the program of religious education?
- What would it take to realize the dreams and improvements you envision?
- Taking into consideration your responses to the questions above, what would be your vision for religious education in this congregation?

Questions for Focus Groups

Religious Education Committee

- What do you think is the scope of religious education in our congregation?
- In what ways do you see your RE Committee work as a ministry of the congregation?
- Reflect on what you know about the history of the RE program in this congregation.
- Describe your relationship with the parish minister or other staff as it relates to the RE Committee.
- Where does religious education fit in the mission of our congregation?
- What can you do to accomplish the mission of the congregation?
- Taking into consideration your responses to the questions above, how would you articulate your vision for religious education in this congregation?
- What would it take to realize the dreams and improvements you envision?

Professional Staff: Parish Minister, Music Director, Youth Director or Minister

- How does your ministry in this congregation relate to religious education?
- How does it support or complement your work?
- What insights do you have as a result of your experiences with children, youth, and adults?
- Reflect on what you know about the history of the RE program in this congregation.
- Describe your hopes for a professional relationship with the religious educator of your congregation.
- Where does religious education fit in the mission of our congregation?
- What contributions can you make to accomplish the mission of our congregation?
- Taking into consideration your responses to the questions above, how would you articulate your vision for religious education in this congregation?

Youth

- How long have you been a part of this congregation?
- How often do you participate in the program of religious education?
- Are you an active participant in the youth group?
- What do you like best about being part of the religious education program?
- What contributions do you make to the program of religious education?
- How would you describe your understanding of a religious educator's position?
- What would you like to add to the program?

- Describe the ways this congregation values children and youth.
- What changes do you think would strengthen the ministry of religious education?
- What would it take to realize the dreams and improvements you envision?

Children

- What do you look forward to when you come to our society or fellowship?
- Describe ways in which the adults and older youth show that they think you are important to the congregation.
- Describe the ways in which you contribute to this congregation.
- What opportunities are there for you to participate in worship services?
- Name a few important things you have learned about being a Unitarian Universalist.
- What are some things that you do that show that you have learned important things from your congregation?
- What changes would you like to make to strengthen religious education in your congregation?
- Describe how your family supports your congregation.

Appendix II

Sharing Responsibility (from pp 28-29 of *The Search for RE Leadership*)

This chart can be used in many ways and should be adapted to reflect your program.

Sharing Responsibility

Each participant checks the tasks s/he thinks are the primary responsibility of the religious educator and which such as the Religious Education Committee, the parish minister, or other volunteers, would act as support. Feel free to create a list that reflects the specific tasks that need to be accomplished in your setting. After all have participated, develop a master sheet and tally all responses. Review and negotiate areas of controversy. Check for understanding and agreement among all parties. A general rule is that a full-time religious educator will have responsibility for overseeing most of the areas, which does not mean that person will directly carry out all of them.

You can use a simple system of indicating P for primary responsibility and S for support under the appropriate column for each row. Or you can use a [RACI chart](#) approach. (“RACI” stands for “responsible, accountable, consulted, informed.”)

Areas of Responsibility	Religious Educator	Parish Minister	RE Committee	Other Volunteer/ Staff
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Program Philosophy and Curriculum

- Formulate program goals
- Design the program
- Create a welcoming and nurturing learning environment
- Review and obtain curriculum resources
- Evaluate the program

Communication

- Write weekly newsletter material
- Greet and welcome newcomers and visitors
- Publicize the program
- Develop the yearly brochure
- Design yearly publicity calendar for groups
- Provide counseling and pastoral care

Volunteers

- Recruit group leaders for program
- Select a youth advisor
- Orient volunteers to teaching
- Provide ongoing support for volunteers

Worship and Special Events

- Oversee children's chapel
- Oversee youth worship
- Oversee intergenerational Worship
- Oversee adult Worship
- Plan special events and celebrations

Administration

- Purchase and maintain supplies and equipment
- Keep registration records up-to-date
- Manage the religious education database
- Keep financial records for the RE Committee
- Keep up-to-date attendance information

[Link to Feedback Survey](#)