



TO SUSTAIN THE LIVING TRADITION

Final Report and
Recommendations to
Unitarian Universalist
Congregations on
Compensation &
Benefits Practices

January 1995

The UUA Committee on
Ministerial and Church Staff Compensation

"The great enemy of authentic community in our world is what Wendell Berry calls 'the rootless, faceless monoculture of exploitation.'

We UUs have to make sure that our congregations are authentic moral and spiritual communities; not exploiters."

— John Buehrens, UUA President, June 1994

"Understanding how we diagnose and construct our experience, take action, and monitor our behavior while simultaneously achieving our goals is crucial to understanding and enhancing effectiveness. If we learn to behave differently and to make these new behaviors stick, we will begin to create a new world."

Chris Argyris and Donald A. Schon

Theory in Practice

Jossey-Bass Publishers

San Francisco, 1974

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Unitarian Universalist Association of Congregations



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February 27, 1996

Dear Friends,

We are pleased to make available additional copies of **To Sustain The Living Tradition**, the final report of the Committee on Ministerial and Church Staff Compensation. That report is attached.

At the same time, we have attached copies of the revised recommendations as passed by the UUA Board of Trustees in April, 1995, and subsequently ratified by the General Assembly in Spokane.

We invite your attention to this report and to the recommendations, all of which are intended to improve the quality of life in our congregations through providing for our ministers and staff in ways that are consistent with our principles, and which are reflective of our desire to be responsible employers.

If you would like to see the research that formed the basis of this report, I invite your attention to a volume entitled **The Price We Pay**. Copies are available by writing or calling my office at the UUA.

The new Committee on Compensation, Benefits and Pension has been meeting since last July planning the implementation of this report. Toward that end we have scheduled training for **District Compensation Consultants**, this April in the Boston area. This training, fully paid for by the Council on Church Staff Finances, will provide a trained resource in your district as that district moves to providing direct service to your congregation.

If you have questions or concerns, we are available to address those as well. Please be in touch with us as the need arises.

Sincerely,

Harry C. Green

Church Staff Finances Director

Department of Ministry

for the Committee on Compensation, Benefits and Pension

VIII. Action on Compensation Committee Report

As ratified by the General Assembly, June 1995.

As a matter of usage, references in these recommendations to

“The Guidelines” or “The Guidelines Program” refer to the full set of recommended compensation and benefit standards proposed by the recommendations;

“Basic Compensation Ranges” refer only to the standards for compensation which appear in the chart on page 23 of “To sustain the Living Tradition.”

THE BASIC MEASURE OF SERVICE:

1. We recommend adoption of the Basic Compensation Ranges set forth in the table on page 23 of “To Sustain the Living Tradition,” effective immediately, subject to adjustment as set forth in Recommendation 5 and as the Board of Trustees may, from time to time, determine.

The Guidelines are intended to be used in conjunction with a unit-based system for measuring service rendered and determining compensation levels. A unit is defined as a morning, afternoon or evening devoted to a congregation’s work. In the unit system, adopted as part of the compensation Guidelines, 12 units per week constitute full-time service.

2. We urge congregations to employ flexibility of the ranges to reflect a number of factors in setting and adjusting the compensation for each professional.

IMPLEMENTATION OF GUIDELINES:

3. We urge congregations to begin to implement the Guidelines as soon as practical.

4. Each congregation adopting the Guidelines Program and qualifying as meeting the Guidelines shall be designated a “Fair Compensation Congregation (Practicing)”, congregations adopting the Guidelines as a goal and establishing a specific plan for reaching the goal within a five year period shall be designated a “Fair Compensation Congregation (Committed)”, and shall retain such designation until achieving the goal or failing to make annual progress toward it.

ADJUSTMENT FOR COST OF LIVING DIFFERENCES:

5. We urge congregations when setting and applying the Basic Compensation Ranges to consider cost-of-living differences from the base amounts.

BENEFITS GUIDELINES:

6. We urge all congregations to provide a basic benefits package (including health, life and disability insurance, a retirement plan, and partial payment of social security taxes) for all full-time staff members: ministers, religious educators, administrators, and musicians; likewise we urge providing to part-time staff members a similar benefits package prorated proportionally as their service compares to full-time service.

7. We urge congregations to determine benefits coverage prior to the establishment of a salary and housing (or compensation) figure; benefits should not be the subject of bartering about compensation.

HEALTH INSURANCE

8. We urge congregations to make a health insurance program available to each religious professional. Ideally such coverage would be on a fully paid basis for such religious professionals.

PROVISION FOR RETIREMENT:

9. We urge congregations to make payment to a retirement plan in an amount equal to 14% of compensation (including housing) for all religious professionals.

DISABILITY INSURANCE:

10. We urge congregations to provide long term disability insurance with benefits, following 90 days' disability, payable to age 65.

GROUP INSURANCE:

11. We urge congregations to cover a group life insurance policy to protect dependent survivors in an amount equal to two years' compensation (including housing).

EMPLOYER'S SHARE OF SOCIAL SECURITY TAX:

12. We urge congregations to provide at least one half of the self-employed social security tax (FICA) which is a percentage of salary and housing for ministers.

VACATION:

13. We urge congregations to provide one month of vacation time as a minimum for each religious professional.

PROFESSIONAL EXPENSES GUIDELINES:

14. We urge congregations to determine professional expenses prior to the establishment of a salary and housing (or compensation) figure, and we urge an annual update.

15. We urge congregations to provide professional expenses and include automobile and travel allowance, conference and professional association expenses, attendance at professional association meetings, district events, General Assembly, continuing education, and other necessary related obligations.

16. We believe continuing professional education is an essential for each religious professional in order to maintain and advance professional skills and knowledge. We urge congregations to provide adequate time for professional personnel's continuing education including sabbatical leave, not to be considered as part of vacation.

17. We urge congregations to assign to a newly created compensation and benefits committee, or to an existing committee, the responsibility for administration of the Guidelines.

18. District compensation advocates should be designated by each district board to serve as a resource to congregations. These advocates shall form district compensation committees composed of committed UUs familiar with matters related to compensation and benefits for ministers and church staff. The district compensation advocate will receive initial training at UUA expense.

19. The UUA Board will establish a standing committee on compensations, benefits, and pension to be comprised of five members appointed by the Board; three ex officio members who shall be the UUA Treasurer, the Chair of the UU Council on Church Staff Finances, the UUA Financial Advisor; and one member appointed by the UUMA Executive Committee. This committee will provide direction and support in implementing and administering the UUA's Guidelines Program and will oversee the UU Organizations Pension Plan (this committee will replace the present Pension Committee).

20. The UUA Office of Church Staff Finances will be responsible for gathering and distributing current information about compensation and benefits, costs of living and other related data to all UU based ministers, MREs, DREs, Music Directors and Business Administrators; to the Executive Committees/Boards of concerned professional organizations; US member congregations; District Presidents; District Field Service Staff, Settlement Representatives; Good Offices Consultants; and other relevant persons.

Submitted by the Board of Trustees

Board Vote: 24-0-0

Ratified by the General Assembly, Spokane, WA, June, 1995.

Executive Summary

Perhaps once in a decade or two an issue confronts us which calls us to witness to our beliefs or compromise them, to reinvigorate our organization or watch it lose the snap of life and meaning, to do a good work or turn away. This report deals with such an issue; we can ignore it no longer.

BACKGROUND

At its October 1990 meeting the UUA Board of Trustees appointed a Committee on Ministerial and Church Staff Compensation and gave it the following charge:

To make recommendations to the Board of Trustees, after consultation with appropriate representatives of all sizes and types of congregations, concerning ministerial and church staff compensation, including:

- a process for ongoing review of compensation levels and practices
- guidelines for compensation and related personnel policies
- a process for raising awareness of the importance of improved compensation levels.

The General Assembly Commission on Appraisal, five years ago, found a growing dissatisfaction among congregations about the quality of ministerial service. Concerns centered around perceptions that some ministers, in apparent increasing numbers, are not meeting the expectations or needs of congregations. As a consequence two task forces were created by the UUA Board of Trustees to address what was defined as the significant problems of ministerial excellence and compensation.

The Committee on Ministerial Compensation early on went through a change in its charge and name to become The Committee on Ministerial and Church Staff Compensation — for the concerns of excellence and competence, and fair and reasonable remuneration for service to our congregations apply to all religious professionals.

In its November 1993 report *The Price We Pay*, the Committee summarized the results of a survey of US-based Unitarian Universalist congregations. The survey covered practices and attitudes on compensation and benefits provided to professional staff personnel. It showed, in general, compensation lagging behind comparable religious denominations, and benefits coverage to be at a level about 50% that of the other denominations.

PROCESS

Subsequently, the Committee conducted a series of open focus group style meetings attended by lay leaders and professionals at various locations across the US portion of our constituency, and at the 1994 General Assembly. Additional special meetings were held with concerned professional and student groups. The purpose of these meetings was to

assess information revealed in the survey and to discuss recommendations for action which the data might suggest. The results of those meetings are discussed later in this report.

Prior to the writing of this report, and also while it was in draft, the Committee engaged in extensive consultation with the UUA Administration and with the professional associations of our church staff personnel.

ABOUT THIS REPORT

The Committee has completed its analysis of the survey results and of input from concerned lay and professional Unitarian Universalists, as well as its own study and reflection on the causes and consequences of our history of dealing with compensation and related issues.

These factors will be discussed in detail in the body of the report, but an overview of the problem and the setting in which it arose needs mention here. The cumulative effect of three trends:

1. The proliferation of small societies,
2. The drop in total membership since the high point in 1966, and
3. 25 years of inflationary pressures on congregations and contributors,

eroded the financial base of many congregations and caused an almost unnoticed mutation of congregational values, attitudes, and practices with regard to compensation of religious professionals. The consequences to those professionals were a steady decline in compensation, benefits and expenses in the face of an ever rising cost of living, and the by now common routine of cutting those items to balance budgets — all without relating to congregational goals or vision. The consequences to the congregations were a decline in the quality and enthusiasm of their professional staffs, leading to their discouragement and even despair, reflecting itself in congregational vitality and viability.

The Committee recommends adoption of guidelines for US member congregations to use in setting amounts of compensation and benefits for those on its professional staffs. We believe the recommendations:

- Reflect the views of our constituency as expressed in the survey results and by focus groups and other concerned parties with whom we met, and
- Respond to a series of fundamental challenges we have identified — challenges to our Association, its member congregations, and our future together, and
- Offer the potential for transforming our entire method of sustaining those who serve our congregations.

We are a body of seekers after the truth — now is the moment to face honestly the facts about the ways in which we deal with compensation and benefits and the much broader systemic shortcomings which foster those ways.

THE DIFFERENCES IN OUR COMMON EXPERIENCE

Each congregation has different needs for religious professionals to assist in carrying out its mission, and different resources available to fund the cost of sustaining those professionals. The results of the survey reported in *The Price We Pay* suggest those differences relate, in most cases, directly to the levels of membership and budget of each congregation. Compensation levels, therefore, are recommended for five separate groupings of congregations.

The Guidelines establish, for each of those five groupings of congregations, compensation levels for each category of full-time religious professional typically serving on congregation staffs, namely:

Minister	Minister of Religious Education	
Associate Minister	Assistant Minister	Religious Education Director
Music Director	Business Administrator	

The Guidelines also establish a basis for quantifying amounts of part-time service rendered, and relating those amounts to the Guidelines recommended for full-time service.

Cost-of-living differences among congregation locales are recognized. A mechanism is provided for adjusting the Guidelines to each community, and for fluctuations in cost of living figures from year to year.

THE GUIDELINES AND HOW TO USE THEM

The Guidelines are not intended to tell a congregation how it must structure the compensation and benefits it provides, but how it might do it. They are not intended to create ceilings, but to suggest where the floor ought to be. They are not intended to tell a congregation how it should organize and manage its professional staff or what form of working relationship it should emulate. They do offer a model which, while closely following present practices, also facilitates creative and flexible approaches to staff working relationships, and should be immediately useful.

The Committee recommends adoption by the UUA Board of Trustees of the Guidelines and related recommendations set out in this report, beginning at page 16. They will be subject to modification each fiscal year in response to changing economic and other circumstances, commencing with the year starting July 1, 1995.

Compensation

The compensation guidelines set out in subsequent sections of the report define compensation as salary plus housing allowance (where applicable). The schedule at page 23 sets forth compensation ranges for each professional position in each size congregation. The relationships among the various positions within a given congregation and what might be a typical advancement track are illustrated.

Benefits

The guidelines for benefits encompass a basic protection plan, including health insurance, disability insurance, life insurance, and provision for retirement. The compilation beginning on page 27 describes each of the minimum benefit elements recommended for all church staff professionals.

Expenses

Guidelines are also recommended for professional expenses. Certain expenses incident to the performance of the various professional functions should be covered by each congregation and these are enumerated on page 30.

The Guidelines are designed to be employed by congregations to set initial salaries and benefits for professional employees, and to provide a basis for ongoing salary administration. In recommending these Guidelines, the Committee recognizes it is ultimately the responsibility of each congregation — its lay and professional leaders, working with its membership — to determine levels of compensation and benefits for those who serve it. The purpose of the Guidelines is to facilitate the informed exercise of that responsibility.

IMPLEMENTATION

In order to overcome the inertia with which new ideas calling for action are often greeted, the Committee believes it essential that all encouragement possible be offered to congregations to induce them to participate in the Guidelines program, and all reasonable support when they do. This encouragement and support should take the following forms:

- Adoption by the UUA Board of Trustees and General Assembly of strong policy statements and initiatives supporting the Guidelines program.
- Consciousness raising for candidates for the parish ministry and the ministry of religious education as part of the fellowshiping process.
- Advocacy and moral suasion by the Department of the Ministry in favor of the program with congregations and with candidates in connection with the settlement process.
- Strong, pro-active support of congregational efforts to implement and administer the program in the form of available compensation and benefits consulting support and of current information, staff and other resources.

Realizing that the economic resources necessary to implement the program in each congregation will, in many cases, not be immediately available, the Committee includes in this report a scheme to achieve full participating status which can be carried out over a five-year period.

The Committee on Ministerial and Church Staff Compensation presents these Guidelines and recommendations in full knowledge that the discussion they invite requires from all of us extraordinary amounts of good will, honesty, and an ability to listen to one another. We share as a Committee the conviction that this effort will be met with understanding and a collective contribution to a positive result for our professionals, for our congregations, and for our Association.

How We Are Challenged

"But, more important, the Committee is concerned, not primarily about salaries, but about the health and future of our Churches. Salaries are important because they are inevitably involved in the vital matter of providing an adequate ministry of liberal religion in a world which needs that religion"

—The Committee Studying Unitarian Ministerial Salaries, March 1943

The UUA Committee on Ministerial and Church Staff Compensation in 1995 understands its central goals to be essentially no different than those of the committees which preceded it in 1915 and 1943. Our aim, as was theirs, is to find and apply answers to two basic questions:

How can we promote the health and future of our congregations?

How can we work to assure a ministry to an increasingly diverse and inclusive religion in a world which needs it so desperately?

In pursuit of those aims, the Committee believes our member societies must fully face up to certain basic challenges, challenges which go to the heart of any meaningful strategy for the future:

1. THE CHALLENGE TO ENHANCE THE QUALITY OF PROFESSIONAL LEADERSHIP

The success of each of our congregations is directly tied to the quality of its leadership. The effectiveness of that leadership is magnified when religious professionals play a significant role. Unfortunately, we have lost and continue to lose many of the best from our active ranks because we do not provide the attention to the welfare and opportunities for growth deserved by well qualified personnel. We also believe we discourage a significant number of excellent candidates for these positions. Quality and compensation are, we must realize, closely related. Our ministers evidence frustration and low morale about their compensation and their future; the average career for a Unitarian Universalist religious education director is three years; we cannot accept such a situation.

2. THE CHALLENGE TO ACHIEVE FAIRNESS

We do not honor in our compensation and benefits programs the call to "*justice, equity and compassion in human relations*" and the recognition of the "*inherent worth and dignity of every person*" in the UUA Principles and Purposes. Our ministers are provided basic benefits — health insurance, life insurance, disability insurance and a retirement plan — at roughly half the level of other denominations. Even if a minister receives these benefits, other full-time staff usually receive few or even no basic benefits.

3. THE CHALLENGE TO REVISE RADICALLY OUR CURRENT PRACTICES

We are going to have to change. We need a new system to point the way to good, credible compensation and benefits. We need a new system to illustrate reasonable practices which congregations may establish and follow. We need a new system to help us

reconsider our staffing methods and priorities. We need to reexamine congregational polity to discover not only the freedom of the independence we claim as its legacy, but also the sense of common responsibility and the value of association it has always envisioned. Developing such standards, and building support for them, must be done cooperatively, by congregations, districts and the UUA

4. THE CHALLENGE TO REASSIGN LEADERSHIP ON THESE ISSUES

We need to reconsider the respective roles professional and lay leadership take in this area of our shared ministry. It is left to the Unitarian Universalist Ministers Association (UUMA), Liberal Religious Education Directors Association (LREDA) and the Unitarian Universalist Musicians Network (UUMN) to be the primary source for compensation guidelines. Yet we then dismiss those benchmarks as being “from the union”, put forward “in self-interest”. Change in compensation and benefits practices will only come about when objective and motivated lay leaders take hold of the process and enter upon constant, honest and creative conversation with the professionals.

5. THE CHALLENGE TO SET AND ACHIEVE GOALS

In the pages following we find repeated calls for us to set goals to improve compensation and benefits practices. Surely, if we don't know where we are going, we shall never get anywhere. But goals once set must be pursued year in and year out with energy, faith, commitment and persistence.

6. THE CHALLENGE TO WITNESS TO OUR UNITARIAN UNIVERSALIST FAITH

We have a positive record as congregations and as an Association when faced by great and threatening challenges. Issues surrounding fair compensation, equity, and the economic security of those who, from their deepest commitments, serve our congregations, are not simple or amenable to quick solution. It will need our shared and summed courage and a strength of will to surmount this challenge which goes to the foundation of our vision of what is just and right.

These are real and urgent challenges for us in our time. Our forebears in 1943 — and before that in 1915 — faced the challenge of recommending ways to provide a secure and supportive base for professional religious leaders in their times. We must do the same for this time.

There needs to be an urgency to this work. We cannot afford to wait. We have too much to lose in terms of good people, and of institutional momentum and opportunity, should we fail ourselves on this issue.

The Compensation Committee's Task

ABOUT THE COMMITTEE'S PERSPECTIVE

We realized at the outset that our charge and the subject of our work suggested we were taking on a task complex in its substance and demanding of great sensitivity in its execution. Little did we know...!

Dealing with issues at the core of congregational polity, professional recognition, economic sustenance if not survival, reconciliation with our UUA principles, the need for each of us to confront our individual and congregational responsibilities — responsibilities to our institutions as well as to those who serve them — have greatly challenged us. But they also challenge our Association and all its member congregations in profound ways, having enormous present and future consequences. We have spoken of these challenges. Now, in this report, we must speak to ways in which to meet them.

Normally at this point we might say the opinions expressed herein are our own, etc. — but, in fact, they are yours. You, the members and leaders of our congregations, own them because they represent what you told us in the survey, and what you told us in the regional focus groups. You spoke not only of your congregations' practices on compensation and benefits but, more revealing, you told us of your attitudes on these matters.

We all—Committee members and congregants—know in our heads what we are doing, and in our hearts what we ought to be doing. But this is a Unitarian Universalist process; so read on, form your own conclusions, decide what you believe is just and equitable to all individuals and institutions concerned and — in our tradition at its best — do what you determine needs to be done to set this part of our world right.

THE UUA COMMITTEE ON MINISTERIAL AND CHURCH STAFF COMPENSATION

<i>Bonnie Brae</i>	<i>Lay leader, Studio City, California</i>
<i>Mary Grassie</i>	<i>Business Administrator, Manhasset, New York</i>
<i>The Rev. Robert Karnan</i>	<i>Minister, Portsmouth, New Hampshire</i>
<i>Robert Lavender, Chair</i>	<i>Lay leader, Westport, Connecticut</i>
<i>The Rev. Terry Sweetser</i>	<i>Minister, Minneapolis, Minnesota</i>

Committee Members Who Have Completed Their Terms

<i>Joe Wilkinson</i>	<i>Lay leader, Chicago, Illinois</i>
<i>The Rev. John Wolf</i>	<i>Minister, Tulsa, Oklahoma</i>

UUA Staff Liaison

<i>The Rev. Harry Green</i>	<i>Church Staff Finances Director</i>
<i>The Rev. David Hubner</i>	<i>Ministerial Development Director, (Church Staff Finances Director through June 1994)</i>

STAGES OF THE COMMITTEE'S WORK

Phase I: Review & Survey

During this phase the Committee reviewed what it knew about compensation and benefits practices in Unitarian Universalist congregations, retained an independent compensation and benefits consultant, sent a compensation and benefits survey to Unitarian Universalist congregations in the U.S., processed the information which came back, and published the results. This phase was completed in November 1993. Details are set out in our first report, *The Price We Pay*, and reviewed in Appendix A to this report.

Phase II: Consultation

Since the beginning of 1994 the Committee has set up and benefited from a number of regional compensation and benefits meetings, special meetings with interested groups, and intensive reviews of a working draft of this report with closely concerned parties. The details of those meetings and what we learned from them — and what we've gathered from other sources, as well — are described on pages 10 through 15, and in Appendix B.

Phase III: Implementation

The Committee presents here its final report, together with its recommendations including a procedure for implementation so that congregations, districts, and the Association may, in an organized and formal way, begin to adopt and implement those recommendations. It is anticipated that the implementation process from this point forward — contingent on acceptance by the UUA Board of Trustees of this report and approval of its recommendations — would consist of three stages. First, action by the UUA Board authorizing distribution of this report to congregations for their consideration in advance of action on the report at the 1995 General Assembly; second, drafting of an amendment to the UUA Bylaws providing for establishment of the proposed UUA Committee on Compensation and Benefits as a standing committee; and, third, development by the UUA Administration, in a coordinated effort of related departments of the Association, of detailed procedures to promote and administer the Guidelines Program, and of the budgetary impact thereof. All stages of the implementation process need to be directed at encouraging congregations to employ the Guidelines in negotiating and setting compensation, benefits and professional expenses. In the longer view, some congregations may never be able to reach or maintain Guideline level pay and benefits — and we need to be realistic about this, and about the questions that are thus raised about models of staffing in those situations.

TOWERS PERRIN

In June of 1992, the Committee retained Towers Perrin, an independent and highly respected compensation and benefits consulting firm, to bring their professional expertise and objectivity to our efforts. Members of this firm:

Conducted a series of interviews with lay and professional leaders to get their views of Unitarian Universalist compensation and benefits issues and to familiarize themselves with our culture.

Suggested our study not include Canadian congregations because of the difference in economic, taxation and social systems between the countries. The CUC is sponsoring its own compensation and benefits study. (A preliminary report was published in May of 1994.)

Worked with the Committee to design a compensation and benefits survey to be sent to congregation leaders; helped assure confidentiality by asking that all responses be sent directly to them and by releasing results only on a summary basis.

Assisted the Committee to structure a series of focus groups to assess professional and lay leaders' reactions to the survey results and their sense of the direction congregations and the Association should take in response.

Reviewed the report as prepared by the Committee, offering suggestions with respect to emphasis and presentation.

Worked with the Committee to develop a manual and worksheet forms for use by congregations to establish and/or negotiate compensation, benefits and expenses, and to administer the Guidelines Program on an ongoing basis.

THE COMMITTEE AND THE PROCESS

Members of the Committee made every effort not to anticipate the process by advancing our own individual ideas and proposals. We think we have been largely successful in doing that. We have listened carefully to what our constituencies have had to say about the issues and challenges before us. The information reported and recommendations made have grown out of that process — and, with ongoing feedback will, we hope, continue to evolve in helpful ways.

The Regional and Other Meetings

A series of day long regional compensation and benefits focus group meetings (as well as other hearings and meetings) were scheduled following completion of the survey in order to:

- Review the findings reported in *The Price We Pay*.
- Ask a series of questions related to issues raised by the survey .
- Determine what compensation and benefits issues and what form of assistance were important to Unitarian Universalist lay leaders and professionals.
- Gather recommendations about assistance and resources needed and how best they might be made available.

1994 MEETING SCHEDULE

Focus groups

March 5	California	Unitarian Universalist Church, Studio City, CA
March 19	New England	Unitarian Universalist Church, Portsmouth, NH
April 9	Pacific NW	University Unitarian Church, Seattle, WA
May 7	Southwest	Emerson Unitarian Church, Houston, TX
May 14	Metro NY	Unitarian Universalist Congregation at Shelter Rock, Manhasset, NY
June 11	Washington DC	Unitarian Church, Rockville, MD

Other presentations/hearings

January 6	Representatives, various UU organizations	Council on Church Staff Finances. Boston, MA
March 4	Students	Harvard Divinity School, Cambridge, MA
March 26	Religious Educators	NEIDRECOM Retreat, Harvard, MA
April 23	UUA Board	Boston, MA
April 26	UUMA Executive Committee	Cambridge, MA
April 26	Ministerial Aid Fund Committee	Boston, MA
May 12	Students/Ministers	Meadville Theological School, Chicago, IL
June 20	UU Administrators	Professional Days, Fort Worth, TX
June 22-28	Hearing/Meetings	UUA General Assembly, Fort Worth, TX
July 22	Star Island	RE Week
Oct. 15/16	LREDA annual conference	Madison, WI
October 21	UUA Board Working Groups	Boston, MA

Findings from the Focus and Small Group meetings sponsored by the Committee over the past year and the Committee's reflections on those meetings are reported in the two sections immediately following. Appendix B contains information about the meeting process and a representative selection of comments and concerns which came directly from the participants.

FINDINGS FROM THE REGIONAL MEETINGS

From Small Societies

As reported in *The Price We Pay*, the Committee found a pattern of congregational practices statistically too significant to ignore any longer. We found many smaller societies have at their heart a commitment to parish ministry as their main resource. Yet we found also a pervasive awareness within these congregations that the compensation they are presently offering is inadequate and it has steadily undermined professional self-esteem, commitment, and longevity. This is what the lay leaders report, as do the religious professionals themselves.

Most ministers serving these congregations are at serious financial risk. Additional staff — when present — for the most part spoken of as “professionals”, is often compensated as “paid volunteers”. Congregations which evidence this behavior constitute fully one half of those within the UUA.

From Midsize Societies

Additionally, the Committee found another statistically significant pattern of congregational practices for 42% of our societies — a fundamental commitment to parish ministry, but also attempts to employ and compensate additional religious professionals at a “professional” level.

The Committee found these Midsize congregations fall into two distinct groups.

Midsize I **The first group is composed of the smaller half of the Midsize congregations (150 to 249 members).**

The pattern here is a ministry compensated almost sufficiently in terms of salary and housing, but with seriously inadequate provisions for professional expenses, health insurance, retirement and other basic benefits which form the safety net for an already poorly compensated profession.

This group of congregations additionally makes commitments to other professional staff, but does not (as a group) fulfill them. It is common to find secretarial positions raised to “administrator” nomenclature without providing even a low base pay and benefit package for a secretary.

Perhaps the hardest hit professional category in this group is religious educators. Expectations for professional employment and career development are common here, but follow-through with compensation and supporting benefits is generally not in evidence.

Midsize II **The second group of Midsize societies (250 to 499 members) is much like its smaller cousins but it does better, as a group, in compensating religious professionals other than the parish minister.**

The pattern of nearly sufficient salary and housing continues for parish ministers, but so too does substandard provision for professional expenses and basic benefits. What distinguishes this group is a willingness or ability to provide measurably higher salaries for religious professionals other than parish ministers. By no means, however, can these "higher" salaries be considered sufficient. Benefits coverage is almost non-existent.

The number of religious professionals who serve Small and Midsize Unitarian Universalist congregations is large. It is most of them. The average employment time for a Director of Religious Education is three years. Half are gone within two years. Most are gone in four. Without a clear and useful professional education program and a certification procedure which honors that preparation, and without adequate compensation from congregations (salaries, benefits, expenses) the terrible truth is that our "professional" religious education category is almost non-existent. As an association of congregations we apparently have little commitment to professional religious education leadership.

Numerous focus groups noted sadly that this trend may also be seen with regard to parish ministry.

From Societies of All Sizes

The expectation is that ministers might begin their career in a Small congregation and move when appropriate to a Midsize one. Still later, for some, is the possibility of a call to a large Multi-staff congregation. The evidence is that many do not progress much at all and serve honorably with commitment and ability, but without apparent career advancement. Both previous compensation committees in this century (1915 and 1942) documented, as we do, an ever decreasing range of career opportunities for ministers. The pattern of decline in the average size of a congregation in the UUA (contrasted with a pattern of increase in other major Protestant denominations — from 90 in 1890 to 275 in 1992) is a serious harbinger of things to come.

More and more of our religious societies have in the past fifty years entered the category of wanting professional ministerial leadership (and other religious professionals as well) but are of a size and configuration in which they lack sufficient resources to support fair and adequate compensation for such professional leaders.

It is our judgment that this reality has led and continues to lead to a critical undermining of the ability of religious professionals to function fully and competently in our Association and, further, siphons off from ministry and other religious professional categories many of ability and creativity whom we certainly cannot afford to lose.

But one of the most hopeful observations this Committee can share, as a result of a long process of discovery and analysis, is that there exists a strong and dynamic enthusiasm on the part of lay leaders, religious professionals, and the UUA Board and Administration to speak honestly about these issues and to craft meaningful long-term solutions. The virtually unanimous evidence of good willed commitment to establishing ways to overcome our quite serious issue of compensation has given this Committee the conviction that we can proceed to a condition of fairness and strength in a short period of time.

Reflections on the Regional Meetings

A clear pattern emerged from those sessions which pointed to significant problems we face in our congregations and in our Association.

Lay leaders were able to identify patterns of thinking and congregational practices which place some responsibility there. Religious professionals were able to find ample indication of their own behaviors and practices that have been less than helpful. Association staff have been frank about limited resources, apathetic responses from congregations and professional leaders, and the need for clarity about the scope and seriousness of issues of compensation and benefits.

As lay and professional leaders spoke frankly with one another, congregational size patterning became more than a statistical convenience. Shared attitudes, practices, and problems became obvious. Proposals for responsible District and UUA level research and support began to emerge along with a determination to make the participating congregations more aware and responsible in their behaviors toward religious professionals.

Perhaps the most overwhelming concern which emerged from these small groups was around the question: "How did we let it get this bad?"

Repeatedly we Unitarian Universalists asked ourselves this question and shared deep concern with one another about our anxiety for our future.

It must be said up front that responsibility does indeed fall on our congregations for the extent of the problem. And it falls on lay leaders, religious professionals, district leadership, Field Service personnel, the Department of Ministry, the Extension and Development Departments, the professional associations, a succession of UUA Administrations and Boards, and thus, consequently, it falls on all of us. We have all, collectively, let it get this bad. We must all, together, work to overcome it.

But more must be said.

YESTERDAY AND TODAY — SOME RELEVANT HISTORY

A look at our history shows that by 1890 the American Unitarian Association was composed of congregations with an average membership close to 250. (See Note) By 1938 the average size grew to 300. There were only a handful of very large congregations and, thus, the average size of a Unitarian congregation, omitting the very large ones, was over 250. By 1992 the average size of a Unitarian Universalist congregation was about 145 (this number includes the thirty or so Unitarian Universalist congregations with more than 600 members).

As an Association we have in the last fifty years sought growth through the founding and nurturing of many small societies. Perhaps it was our expectation that many would naturally evolve into what we took in 1938 to be a normative pattern of size and polity — 300 members, a full-time parish minister, religious education director, secretary and custodian, and a building, fully paid for. For whatever reasons, and they have been and are still being discussed extensively, what we have achieved is an increasing number of small congregations.

Note: Statistics for the Universalist side of our movement were more difficult to find and so we offer only the "Unitarian" part of our history here. The trends are significant, nevertheless.

One half of our religious societies have 145 members or less, constitute one sixth of our UUA adult membership, and have become normative for our Association.

Comparable denominations do not typically settle religious professionals in such small congregations unless they are adequately self supporting (strong pledging and/or endowment). Promising small congregations are provided with partially subsidized mission or extension ministries, but their progress is rigorously evaluated before external funding is continued.

Compounding the programmatic development of small societies during the past fifty years, we in the UUA have sought to place religious professionals in them without adequate financial support for such congregations.

WHERE WE FIND OURSELVES

We have, inadvertently, succeeded in dramatically lowering professional compensation and, as a consequence, we have also lowered the expectations congregations might have for required levels of adequate compensation. The present situation is endemic.

Let us be clear. We are not condemning small society life and culture in the UUA. We are, however, reporting and reflecting on the alarm and dismay within many of those societies and others with regard to the now long-term consequences of inadequate compensation for religious professionals.

Many of our religious professionals serve the small society and our research and the testimony of the focus groups indicates they are at serious risk. The lay leaders and religious professionals of those societies are clear about the extent and seriousness of this issue and their combined testimony is undeniably significant.

OTHER FORCES AT WORK

In 1966 the UUA as a whole recorded its largest adult and children membership figures. Yet for the decade immediately following, membership figures dropped continually, affecting not simply the UUA but, as important, individual congregations. While modest growth has occurred since the late 1970's it has not in a significant way ameliorated the dramatic diminishments which occurred in the decade of membership loss.

At almost the same time the decade of the 1970's produced unrelenting inflation such that by the end of the decade the annual rate peaked at 13%.

The cumulative effect of these forces has been erosion of the financial base of many of our congregations and almost unnoticed alterations of congregational values, attitudes, and behaviors on compensation of religious professionals.

Compensation, benefits, and expenses declined steadily in the face of an ever rising cost of living. Numerous focus groups reported the coincident and common practice of cutting compensation, benefits, and professional expenses to balance budgets without sufficient reference to congregational goals, vision, or purpose.

The focus groups additionally declared that, as individual congregations and as a movement, we are at a crisis point and must establish a sensible way to move forward. These long term forces, behaviors, and inadvertent neglect have combined to define a present state of affairs which, if unaddressed, could be devastating to our professionals, our congregations, and our religious Association.

Recommendations

The UUA Committee on Ministerial and Church Staff Compensation believes it has gathered sufficient information through the compensation and benefits survey reported in *The Price We Pay*, through its work with Towers Perrin, (compensation and benefits consultants to the Committee) through its research on practices in other denominations, through the series of General Assembly hearings and regional and special meetings concluded in the spring of 1994 which provided crucial input from lay leaders, and through extensive consultation with organizations of religious professionals, to make the recommendations contained in this report to the UUA Board of Trustees and the member congregations of the Association for study in congregations and action at all levels.

Your Committee labored long (over four years), listened hard, and pondered deeply. Our substantive differences were minor; our agony over what we learned was considerable. We thought we knew this denomination, but the facts as we found them were worse than we expected. This perspective was shared by concerned lay and professional Unitarian Universalists who told us how they saw the truth and what should be done to value and respond to it. These recommendations, then, come from our constituency as much as from the Committee.

The recommendations are set forth here in a program which can be followed by US member congregations in setting amounts of compensation and benefits for those on its professional staffs. The program includes guidelines for compensation and benefits, and for a process for ongoing salary administration. The recommendations also include support and assist mechanisms through which the District organizations and the UUA Administration will provide information and facilitate the adoption and implementation of the Guidelines.

QUALITY OF AND DIVERSITY IN LEADERSHIP

The Committee understands the basic aim in the compensation and benefits process and practices which we put in place in our congregations is to attract, retain and strengthen leaders of the highest quality and widest diversity for our Unitarian Universalist movement.

All that we recommend will, we think, contribute toward building and adequately supporting that kind of leadership. The changes we propose are aimed to attract and support qualified, dedicated leaders who can serve and promote the changing needs, experiences and cultures of those who are involved in our Unitarian Universalist congregations.

A WORD ABOUT GUIDELINES

It is clear that we have been enmeshed in a long evolving process of diminishment of reasonable compensation for those who dedicate their lives in service to our congregations and to our religious vision. There has been a dominating philosophy articulated in the past to overcome this now universally acknowledged problem. It is to tie the compensation,

professional expenses, and benefits of our religious professionals to another profession perceived as "allied to" or "close to" ministry or directing a program of religious education.

This suggestion is seductive because it seems so simple and easy. It is probably reasonable to use other professions (many of them) and the compensation indexes related to them to study trends and consequences of inflation and other economic forces, but it is wrong to try to equate them. Police work is different than nursing and public education is different from ministry. Each profession has its internal defining features. The most important one for us to face is that the resources to support professional religious service do not come from the general tax base, do not exist in a corporate profit motivated setting, are not reflective of the political issues that dominate most state politics.

Compensation for religious professionals, on the other hand, must be derived from the expression of a community of vision, commitment, and historical identity and faith as that is translated into economic terms. In the secular dimension of our lives we seek the best in professional assistance and support when the need arises. Cost considerations do not come first. Can we really mean to compromise the quality of professional leadership in our religious lives, trading competence for lower costs. The Guidelines are our attempt to embody the values we hold close and dear, the spirit of the vision we articulate so well, and the regard we say we have for enlivened and extraordinary religious leadership.

We have, as a result, found no successful application of any so-called "comparative" profession that is helpful in addressing the depth and scope of the issues we in the UUA face with regard to just and reasonable compensation and the redressing of a long period of devaluation and diminishment.

The Guidelines seek to take into account the range of sizes and styles of congregations within the UUA and the differences in ability, nature of position, level of experience, and other factors pertinent for determining compensation for religious professionals.

We seek equitable and responsible levels of compensation, sufficient and just for the tasks we invite those who serve us to undertake. It is our intent, also, to establish equity among religious professionals who serve the same congregation and, as well, across the entire UUA.

FACTUAL BASIS FOR THE GUIDELINES

The structure and substance of the Guidelines recommended by the Committee have been informed by:

Data on compensation levels in Unitarian Universalist congregations in the US.

As reported in *The Price We Pay*, summarized in Appendix A to this report, this data was based on an in-depth survey and extensive analysis of the information gathered. It not only told us much about compensation levels and practices, and our attitudes about them, but identified striking differences among congregations in other respects.

Data on compensation levels in selected other religious denominations having characteristics and cultures similar to our own.

The Committee also studied the compensation and benefit programs of a number of other religious denominations. Three were selected as models of current practice and procedure. Although each of the three is considerably larger than the UUA, there were many similarities in their culture and constituencies to our own. Critical data was also readily available, as was a willingness to assist us. The three are the Episcopal Church, the Presbyterian Church, and the United Church of Christ.

Of particular assistance to the Committee as a source was the current Clergy Compensation Booklet published by the Massachusetts Conference of the United Church of Christ. Other useful information came from:

Seventh-day Adventist Church in North America

1992 Church Compensation Report published by Christianity Today, with help from the CT Research Director, John LaRue

The 1994 Compensation Handbook for Church Staff, by James F. Cobble, Jr., Steven W. Klipowicz, and Richard R. Hammar. Published by Christian Ministry Resources.

Study by the Committee of various factors identified in its process which suggest what is appropriate and reasonable in light of:

1. UUA values.

We heard over and over from individual laypersons and professionals of their concern about the extent to which our compensation and benefit practices reflected our values as we set them forth in our *Purposes and Principles*. Overwhelmingly, the feeling was that we were not walking our talk.

2. The long-term need for quality professional leadership.

Another concern widely expressed was the need to attract and retain first quality professionals to serve our congregations if they are to continue to be a vital voice in the lives of our congregants and the many communities in which they reside. Clearly, there was a consistent belief that we were not doing this.

3. Fiscal realities for our U.S. member congregations.

Only the member congregations themselves can say how they will muster the financial support necessary to sustain their needs and aspirations. This report may have the impact of putting that question squarely before many of our member congregations.

4. Responsible economic provision, adequate to sustain a reasonable life style for those professionals who serve our congregations.

This, after all, is what this evaluation and series of recommendations come down to. Parameters are suggested by the considerations set out above, but they all must remain academic exercises or give way to the fundamental consideration of the needs of adequate sustenance and protection for our religious professionals during their current service and in their retirement years.

RATIONALE FOR STRUCTURE AND LEVELS OF GUIDELINES

The Price We Pay took a hard look at present practice and found it wanting. Present practice does not meet our need to attract and retain those with the best leadership potential for our congregations' professional staffs; it does not treat our professional staff personnel fairly — as we each would wish to be treated — nor does it honor our professed principles.

The UUA's model guidelines for compensating religious professionals ought to be free of any motivation of cost containment or of taking advantage of a competitive situation. The model should be one of response to values we share in our conjoined religious life. Instead of basing compensation on what others in a perceived similar profession are offering or what those in another religious denomination are offering, let us build a model on shared principles and on the institutional processes which have informed and enabled our institutional decision making over time — identifying objectives in the context of our principles, setting goals, analyzing the facts, discussing the relevant considerations openly and honestly, determining how to achieve our goals, debating, consensus-building, making democratically arrived at decisions, and going forward together.

USING THE GUIDELINES

Let's take a look at some of the specifics of the Guidelines. We have identified a number of factors which should be the basis for modification of the basic Guidelines in individual situations. A brief consideration of these will help set the scene for the Guidelines themselves.

Congregational Size and Resources

Each congregation has different requirements for religious professionals to help carry out its mission, and different resources available to fund the cost of those professionals. The survey results suggest those differences relate, in most cases, directly to the levels of membership and budget of each congregation. Salary ranges, therefore, are recommended for five categories of congregations:

<u>Classification of Congregation</u>	<u>Members and Friends</u>	<u>Operating Budget (thousands)</u>
A Small	Under 150	Under \$100
B Mid-size I	150-249	\$100-149
C Mid-size II	250-499	\$150-299
D Multi-staff I	500-749	\$300-449
E Multi-staff II	Over 750	Over \$450

Full-time Versus Part-time Service

The Guidelines are designed primarily to cover situations in which the professional is called to/employed for full-time service to her/his congregation. It is recognized, however, there is a wide-spread incidence of working relationships defined as "part-time" and compensated accordingly. Often the arrangement is one characterized by limited salary, plus housing allowance, and little or no benefits coverage. The benefit coverage, when offered, is, in many instances, not adequate to the need. The justification that the employee is only

part-time makes sense when that employee has another part-time job in addition to the one with his/her congregation, and that the compensation and benefits from both, taken together, are adequate. Too often this is not the reality.

The principal issue raised by part-time employment is whether the situation is genuinely one in which the congregation needs and expects only part-time service from the professional in question. This is generally the case when the congregation is of limited size and its needs are proportionate to a small number of members. Often, of course, such congregations will have limited financial resources, as well .

The problem arises when a congregation—aware that the resources it can bring to bear to compensate professional staff are inadequate to fund a staff which can respond to its perceived needs—solves its problem by hiring professionals designated as part-time and compensated accordingly, but expecting of them a time and service commitment which, in reality, amounts to full-time service or something close to it. No conclusion suggestive of intent to take advantage of any professional in such a situation should be drawn from this sketch of an all too common actual situation. What is needed is a practical way to deal with it.

The first requisite is to be forthright and identify these situations for what they are. Then we can see exactly what we are dealing with and quantify potential solutions. There can be no meaningful guidance or assistance with a problem not accurately defined. The question with which to start is the fact situation in the field, namely, how much service time each professional on staff actually renders in order to satisfy the requirements of the particular congregation.

The Basic Measure of Service

The nature of the work of serving Unitarian Universalist congregations is such as not to be subject to quantification on an hourly, time clock type of basis. Such an approach neither recognizes the professional character of the work nor the difficulties in drawing a line between work and non-work, when dealing with people and personal relationships. The Guidelines, therefore, come at this a different way.

RECOMMENDATION 1

The Guidelines are intended to be used in conjunction with a unit-based system for measuring service rendered, and determining compensation levels. A unit is defined as a morning, afternoon or evening devoted to a congregation's work. The unit system, adopted as part of the compensation Guidelines sets 12 units per week as being the normal standard for full-time service.

There may be weeks in which time demands exceed the standard by one or two units, and other weeks in which it will be less. A unit will by no means be consistent in terms of actual time elapsed. Some afternoons will be six hours long and some will be two; some two hour evenings will require more presence than participation; however, other two hour evenings will require four hours of advance preparation; some mornings will be spent with most of the membership, and some will be spent with one person. And these are all typical.

The Unit System allows considerable flexibility in application. By not time-clocking the quantification of service, excessive focus on the actual number of hours worked should

be minimized. The assumption is that the system will be applied reasonably, considering the subjective nature of much of the work done in a congregational context. The system is easily understood and applicable to all professional positions. It does work. It is in use in at least one other denomination similar in style and culture to our own — the United Church of Christ. The system will help Unitarian Universalist congregations put in perspective their expectations of staff and how those staff members are compensated.

Implementation of the Guidelines, including the Unit System, calls for compensation (salary and housing allowance) in an amount within the range for position and congregation size, assuming 12 units of service as the standard. When the service commitment is less than 12 units or the compensation varies from the Guidelines, an adjustment factor needs to be applied.

Time away from a professional's work for her/his congregation or for attendance at professional association meetings, district events, General Assembly, or other related obligations, so long as it is in connection with vacation, sabbatical, or a continuing education program, will not affect considerations of service rendered pursuant to the unit-based system.

In those situations in which the professional is called upon to render service equivalent to a lesser number of units than 12, the Guidelines will be applied by multiplying the dollar amounts of the applicable range by a fraction, the numerator of which will be the number of units of weekly service called for, and the denominator of which will be 12.

Compensation Guidelines

Compensation in these Guidelines is defined as salary plus housing allowance (where applicable). The guidelines for benefits encompass a basic protection plan, including health insurance, disability insurance, life insurance, and provision for retirement. Guidelines are also recommended for professional expenses.

The compensation figure for most ministers includes two usual components; salary and housing. The common explanation for this practice is that ordained ministers are defined by the Internal Revenue Service in a manner that makes this categorization both recommended and desirable.

The housing part of "salary and housing" has another significance that is most often overlooked until the settlement of a new minister gives the issue meaning. Probably the only outstanding difference in cost of living as it impacts religious professionals (especially ministers) is the differences in cost of housing in different areas of the country or even within a local region. The pool from which congregations commonly seek a new minister is national or even continental. Quite high housing costs are usual in some areas and moderate and low in others. A "salary and housing" figure in a region with high housing costs will of necessity be higher for the same minister than it would be in a lower housing cost area. We recommend later in the report a process to help determine the housing cost index for any particular locality as part of an ongoing procedure to establish fair compensation from one area of the country to another.

A series of salary ranges related to specific professional positions and to categories of congregations, as set forth above, constitutes the compensation Guidelines structure. The structure establishes both a descriptive relationship among professional positions within each category of congregation, and the progression we found within each professional track.

The Committee recognizes, in recommending use of these Guidelines, that it is ultimately the responsibility of each congregation, and its lay and professional leadership, to determine levels of compensation and benefits it will provide for those who serve it. The purpose of the Guidelines is to provide the necessary information and the framework within which to make these determinations.

Differences and Variety in Staff Philosophy

An important emphasis of these recommendations is to report that, although there are easily identifiable categories of Unitarian Universalist societies with regard to practices of compensation, we must also report that staff configurations exist in great variety throughout the five size categories.

Different philosophies from one congregation to another influence the structure and function of lay and professional religious leader authority and responsibility. There exists a large variety of staffing relationships and organization charts. Sometimes this variety is indicative of patterns common to congregation or staff size, sometimes it is not.

Some congregations seek to establish two ministers as a co-equal. Some organize themselves so that there is equal responsibility on the part of all ministers for all areas of congregational life. Other societies prefer having one minister in a supervisory role with regard to the rest of the staff. Some define clearly separate responsibilities for each minister or religious professional.

We found no uniform preference of structure and function. As a Committee we take no position on how or why a particular congregation orders itself with regard to lay and professional responsibilities. Where congregations seek to establish relationships of equality among ministries, we support that intention fully and want to see it fulfilled not simply by titles but also by parity of compensation. Where congregations organize themselves around models of oversight and supervision we support equitable compensation for all with regard to roles and responsibilities.

We take no position, either, with regard to staffing organization and philosophy. Our attempt here is to establish just and reasonable compensation for all religious professionals included in our charge within all of the variety of structures, roles, and philosophies we found in our research.

We see our task as seeking to support each and every congregation as it orders itself within our quite significant diversity and variety of Unitarian Universalist polity and practice.

RECOMMENDATION 2

The Committee recommends adoption of the Guidelines set forth in the table on page 23, effective immediately and through June 30, 1995, at which time they will be subject to adjustment as set forth at Recommendation 6 and as the Board of Trustees may, from time to time, determine.

Basic Compensation Ranges (Salary and Housing) for Professional Staff Positions

RANGES									
Professional Staff Positions' (To be effective through June 30, 1995)	Initial: \$20,000 Median \$26,000 Goal: \$32,000	Initial: \$32,000 Median: \$37,600 Goal: \$43,200	Initial: \$36,000 Median: \$43,200 Goal: \$50,400	Initial: \$42,000 Median: \$52,500 Goal: \$63,000	Initial: \$56,000 Median: \$78,400 Goal: \$100,800	Initial: \$80,000 Median: \$110,000 Goal: \$140,000			
Director of Religious Education	B	C	D	E					
Business Administrator	B	C	D	E					
Music Director	B	C	D	E					
Assistant Minister		C	D	E					
Minister		A	B	C					
MRE			C	D	E				
Associate Minister			C	D	E				
Program Staff Professional. ²	D	E							
Ministries of Differing Models- Multi-Staff Congregations					D	E			

Key: A: Small Congregation (less than 150)
 B: Midsize I Congregation (150-249)
 C: Midsize II Congregation (250-499)
 D: Multi I Congregation (500-749)
 E: Multi II Congregation (more than 750)

Notes: 1. See Appendix C for a Professional Level Staff Profile for all positions on this chart.
 2. Example of Program Staff Professionals include: Membership Development Coordinator, Assistant to the DRE, Youth Ministry Director, Choir Director, etc.
 3. Ranges assume full-time service
 4. All ranges are subject to adjustment for cost of living differences among geographic locales--see text.
 5. Multi-staff congregations employ a variety of organizational structures. These range in style from collaborative to directive and employ a variety of models for allocating authority, responsibility and accountability. See text for further discussion.

OTHER FACTORS TO BE CONSIDERED

RECOMMENDATION 3

The flexibility of the ranges should be employed to reflect a number of factors in setting and adjusting the compensation for each professional.

Such factors would likely include:

- Length of service to the congregation
- Length of service in the denomination
- Other relevant work/life experience
- Progress in mastering the requirements of the position
- Extent to which professional is current with developments in professional standards
- Extent to which a professional is engaged in programs, courses, or personal efforts for professional development
- Adjustments to reflect cost-of-living changes (to the extent not adequately provided for by changes in the ranges themselves).

The Guidelines do not mandate individual adjustments based on the above listed factors. Such adjustments would be at the discretion of the congregation, consistent with the job description for the position.

Adjustment of the ranges to certain special situations will require individual modifications tailored to those situations. For example, the Committee recommends, in cases in which congregations are served by co-ministers, that the Guidelines compensation levels for Minister and Associate Minister be combined, and the total divided between the two co-ministers as may be negotiated by them with the congregation.

IMPLEMENTATION OF THE GUIDELINES

RECOMMENDATION 4

Congregations are urged to begin to implement the Guidelines as soon as practicable.

If it is desirable for congregations to adopt the Guidelines, the sooner the better. Some congregations, acting within their own polity, may wish to begin implementation following presentation of the Committee's final report to the UUA Board of Trustees and its approval by the Board.

The compensation, benefit and expense levels set forth herein should be considered appropriate for use through the current fiscal year ending June 30, 1995. At that time, in accordance with the operating protocol proposed, they will be reviewed in light of economic factors in the United States and the localities of congregations participating in the Guidelines Program, and those congregations advised as to suggested changes, if any.

Those congregations for which immediate adoption is not fiscally feasible, but who

wish to move toward adoption in time will adopt the measured participation program. This will involve a series of steps, as follows:

- Congregation votes to establish a five-year (or less) goal of full participation in the Guidelines Program.
- Personnel, or other appropriate committee as designated by the congregation's board or relevant authority, will determine what levels of compensation and benefits for each professional staff member would qualify the congregation as a Guidelines Program Participating Congregation.
- Personnel Committee and Board prepare a specific plan to reach the goal in measured steps over the five year (or other) time frame.
- Plan is approved by the congregation and registered with the UUA Committee on Compensation and Benefits.
- The UUA Committee approves the plan and designates the congregation as a Guidelines Program Committed Congregation.
- As of the end of each of the congregation's succeeding fiscal years, it reports to the UUA Committee on Compensation and Benefits on its progress toward its goal.

RECOMMENDATION 5

Each congregation adopting the Guidelines Program and qualifying as meeting the Guidelines shall be designated a "Guidelines Program Participating Congregation"; congregations adopting the Guidelines as a goal and establishing a specific plan for reaching the goal within a five-year period shall be designated a "Guidelines Program Committed Congregation" and shall retain such designation until achieving the goal or failing to make annual progress toward it.

USE OF THE SALARY RANGES

In a typical salary range structure, jobs are assigned to salary ranges based on competitive market data and/or relative values determined internally. For salary administration purposes, the salary ranges are generally divided into thirds.

Initial level

Generally the hiring zone. In determining salary for new hires, several factors will be considered, namely, skills, experience, relationships among compensation levels internally, and current salary. In most cases, a new hire should receive a starting salary within the first third of the appropriate salary range. However, if the new hire has significant experience and skills, the starting salary may need to be within the middle third of the salary range.

Median level

The middle third of the salary range includes the mid-point and is used for employees who are performing in the job to its full requirements. Employees in the middle third of the salary range are expected to have all of the requisite skills and experience to master the job fully.

Goal level

This segment of the salary range is used for high performing employees and/ or employees who have been in the job for a long time. Employees' salaries may be and probably should be advanced beyond the goal level of the range under special circumstances, as deemed appropriate by individual congregations.

The use of these ranges in setting and administering compensation in individual congregations will not prove to be a scientific process giving a predictable result over a given time period. Many variables will come into play. The performance of each professional will be recognized in ways which will differ from one situation to another in response to established job descriptions, local evaluation processes, the total amount budgeted from year to year for merit increases, and other considerations set out above in the section, "Other Factors To Be Considered". The importance of the quality of performance will play a major part in these considerations. The context in which the ranges are employed will also change over time as the particular congregation changes and as the ranges themselves are adjusted each year in response to the cost of living.

Based on experience with such ranges across the employment spectrum generally — this should not be read as a suggested standard — a professional might expect to move from the Initial Level to the Goal Level over a seven to ten year period. As previously pointed out, the ranges are guidelines, not fences, and there may be many reasons calling for starting compensation higher in the range than the Initial level, for swift progress to the top of the range, or for compensation beyond the top of the Goal Level. These decisions are in the hands of our congregations and their professional staff members.

ADJUSTMENT FOR COST OF LIVING DIFFERENCES

RECOMMENDATION 6

Consideration should be given in setting and applying the Guidelines ranges to cost-of-living differences from the Guidelines base amounts.

The Guidelines ranges set out above should be considered "national" ranges, but it is understood one size does not fit all.

Information on cost-of-living differentials is available from a variety of sources. Towers Perrin, consultants to the Committee, have recommended use of the BTA Economic Research Institute Survey, published annually, which reports cost-of-living data and analyses for some 3,500 metropolitan areas.

Adjustment of the ranges, where indicated, would be made on the basis of the following table:

<u>Cost-of-Living Category</u>	<u>Metropolitan Area Data</u>	<u>Salary Range Differential</u>
Very high	More than 15% above national average	Plus 20%
High	6% to 14% above national average	Plus 10%
National average	5% below to 5% above national average	No adjustment
Low	6% to 14% below national average	Less 10%
Very low	More than 15% below national average	Less 20%

Using this approach, the base Guidelines salary ranges would be adjusted by the salary range differential percent (from the above table) to determine the salary ranges for all positions in a particular geographic location.

For example, the first range [\$20,000 / \$26,000 / \$32,000] in a High Cost-of-Living location would be increased by 10% to [\$22,000 / \$28,600 / \$35,200]. It is anticipated that, with 3,500 locations reported, virtually all congregations will be covered by relevant local data.

This data will be analyzed and the appropriate adjustment percentage furnished to each member congregation on an annual basis. In those few cases in which directly applicable local data is not available, the UUA, through the District Compensation Consultant will work with the congregation to arrive at an appropriate adjustment, if necessary.

BENEFITS GUIDELINES

We cannot say it more emphatically than this: benefits must be given equal weight and consideration with regard to the support of religious professionals as is given to salary and housing (basic compensation).

RECOMMENDATION 7

A basic benefits package (including health, life and disability insurance, a retirement plan, and partial payment of social security taxes) should be provided for all full-time staff members: ministers, religious educators, administrators, and musicians; part-time staff members should be provided with a similar benefits package prorated proportionally as their service compares to full-time service.

Basic benefits of retirement, health insurance, disability and life insurance, and partial Social Security payments must be determined first in any negotiation of financial arrangements, and are not under any circumstances considered part of compensation. They may not at any time be "bartered away" for higher compensation. For those religious professionals who do not receive housing, benefits and expenses should be determined prior to salary.

RECOMMENDATION 8

A benefits coverage plan should be determined prior to the establishment of a salary and housing (or compensation) figure; in no case should such benefits be the subject of bartering about compensation.

The following benefits are recommended for full-time professional employees, and proportionally for part-time employees.

Health Insurance

RECOMMENDATION 9

A health insurance program should be available to each religious professional. The committee considers the ideal to be provision of such coverage on a fully paid basis for such religious professionals.

Some congregations offer additional coverage for partners or dependents, at cost or with some portion of the cost of family coverage borne by the employer.

It is understood that the cost of health insurance coverage has risen sharply in recent years and many employers in the non-profit as well as the corporate sector have reduced the extent of their payment for such coverage. The real question, however, is whether such existing or newly imposed limitations on health insurance coverage in the interest of cost containment is in the context of adequate compensation. If not, then the effect is doubly regressive on the professional, offsetting a portion of his/her salary (and housing) with the cost of health insurance and shifting that cost from a non-taxable benefit to an employee expense to be paid from income after taxes

Provision for Retirement

RECOMMENDATION 10

Payment should be made to a retirement plan in an amount equal to 14% of compensation (including housing) for all religious professionals.

The reality is that far too many of our ministers, and probably even more of our other religious professionals, retire with little more than Social Security benefits. This is an especially critical issue for those who enter the service of our congregations later in their lives. The UUA is able to provide some assistance after the fact to ministers in need, but a better job must be done over the period during which retirement ought to be earned in providing the necessary moneys to fund adequate retirement plans for all religious professionals.

Experts are in general agreement that contributions of 10% of compensation – at one time the benchmark – are just not adequate; the UUA for its own employees is moving to 14%; some denominations contribute more than 15%.

Disability Insurance

RECOMMENDATION 11

Long term disability insurance should be provided, with benefits, following 90 days' disability, payable to age 65.

Group Insurance

RECOMMENDATION 12

Each religious professional should be covered by a group life insurance policy to protect dependent survivors in an amount equal to two years' compensation (including housing).

Employer's Share of Social Security Tax

RECOMMENDATION 13

Congregation/employers should provide at least one half of the self-employed social security tax (FICA) which is a percentage of salary and housing for ministers.

For other professional religious staff the law already requires such payments.

The following benefits are recommended for full-time professional employees:

Sabbatical Plan

RECOMMENDATION 14

A sabbatical plan should be established for all full-time religious professionals, providing for one month of sabbatical for each year of service.

Vacation

RECOMMENDATION 15

One month of vacation time as a minimum should be provided for each religious professional.

Longer vacation periods are standard for religious professionals with intense schedules of commitment, those in multi-staff environments, and/or those whose work schedules are greater than full-time, as defined by the unit-based system for measuring service rendered.

The recommendation is based on the understanding that the religious professional has two days a week off. If this is not the case, and the religious professional takes only one day off per week, we recommend two months of vacation per year.

PROFESSIONAL EXPENSES GUIDELINES

Professional expenses are critical for religious professionals to be able to carry out the responsibilities with which they are charged. As with benefits they must be considered a separate category from compensation.

RECOMMENDATION 16

Professional expenses should be determined prior to the establishment of a salary and housing (or compensation) figure, and should be annually updated.

Professional expense requirements differ from congregation to congregation, region to region, and with differing responsibilities, job descriptions, and other variables. It is necessary for religious professionals and congregations to establish a clear understanding of the professional expenses for any particular staff position and set of responsibilities.

However, real life records kept by each religious professional and shared with the congregational compensation committee over a period of a year or two should establish a more detailed figure for that congregation, location, staff position, and set of responsibilities.

RECOMMENDATION 17

Professional expenses should be provided and include automobile and travel allowance, conference and professional association expenses, attendance at professional association meetings, district events, General Assembly, and other necessary related obligations.

RECOMMENDATION 18

Continuing professional education is an essential for each religious professional in order to maintain and advance professional skills and knowledge. Professional personnel should be provided with at least one month per year (taken in parts or as a whole) for continuing education, and not considered as part of vacation. The continuing education program should be supported within the professional expense budget.

Institutional Follow Through

If these recommendations are to have meaning beyond that of just a report on the current fact situation with respect to compensation of our religious professionals they have to be part of an ongoing, working mechanism which will relate to changing economic conditions and professional requirements.

If we expect congregations to adopt the Guidelines Program and to continue to make it part of their process of dealing with their professional staff, the congregations have to be convinced that the Association is committed to establishing it and to keeping it functioning.

The implementation of the Guidelines in US-based congregations, and support for each congregation's effort in that regard will be administered by the UUA, in conjunction with District Compensation Consultants in each District. The process will begin in an individual congregation with designation of a committee which will oversee the program.

RECOMMENDATION 19

Each congregation shall assign to a newly created compensation and benefits committee, or to an existing committee, the responsibility for administration of the Guidelines.

Many congregations will already have a committee dealing with such matters, be it the Parish Committee, Finance Committee, Personnel Committee, Administration Committee, etc.

These local committees will:

Maintain current written job descriptions for each staff position.

Establish salary ranges and amounts of current salary, plus housing allowance, where appropriate, for each staff member.

Monitor salaries on an ongoing basis, recommending adjustments, as deemed appropriate, considering performance, and changes in reported cost of living figures.

Act as advocate with the congregation and its board in adhering to the recommended Guidelines and practices in the budget-making process.

To act as the link between each congregation and the denomination's Guidelines Program process, a Consultant will be appointed to carry out this function, much in the manner of the present District Settlement Representatives. These Consultants will be familiar generally with personnel and compensation matters and particularly with the UUA's Guidelines Program. They will be appointed by the District President, upon consultation with the District Field Services Consultant and the UUA Church Staff Finances Director, with the approval of the District Board. They will be given annual special training by the UUA, and will be compensated by the Association on a per consultation basis; they will also be reimbursed for travel and other out-of-pocket expenses.

RECOMMENDATION 20

District Compensation Consultants will be designated in each district, jointly by the UUA Administration and the district board, and shall be Unitarian Universalists familiar with matters relating to compensation and benefits and with the UUA recommended Guidelines and practices and will serve as a resource to congregations; such Consultants will be compensated appropriately by the UUA and shall be reimbursed for their expenses.

District Compensation Consultants will be available to assist local committees in negotiating salaries, establishing salary administration programs, and resolving questions, as requested. Each Consultant will act as a clearing house for current information on compensation and benefits data, guidelines and practices.

At the Association level a new committee responsibility will be established to underline the importance of and to provide direction and oversight for the Guidelines Program.

RECOMMENDATION 21

The UUA Board of Trustees will establish a standing Committee on Compensation and Benefits, to be comprised of lay and church staff professional members informed on compensation and benefits issues generally, and as they are managed in the UUA, in particular.

The Committee will consist of five appointed members; three of the members shall be lay persons, none of whom shall be employees of any Unitarian Universalist congregation, and one of whom shall be the Chair; the two remaining members shall be church staff professionals.

The Financial Advisor, the UUA Treasurer and the Church Staff Finances Director shall be members of the Committee, ex-officio, with vote.

The functions of the UUA Committee will be to provide direction and support in the implementation and administration of the UUA Guidelines Program, to track current developments in compensation and benefits both in and outside the denomination, to assist in resolving questions or disputes involving compensation and benefits matters, and to propose to the UUA Board such changes in policy and procedure as it deems appropriate.

RECOMMENDATION 22

The UUA Office of Church Staff Finances will be responsible to distribute current information about compensation and benefits, cost of living and other related data to all US based ministers, MREs, DREs, Music Directors and Business Administrators, and to the Executive Committees/Boards of concerned professional organizations.

The Office will also maintain and make available data, as necessary and appropriate, and will respond to inquiries on compensation and benefits matters. We suggest an additional staff person in the office to carry out those functions necessary to administer the Guidelines Program. This position could best be filled by a human resources professional.

RECOMMENDATION 23

The UUA Director of Congregational and Field Services will distribute current information about compensation and benefits guidelines and practices, cost-of-living and other related data as the Committee on Compensation and Benefits may, from time to time, direct.

Initially, such distribution should be to:

1. Each US member congregation, attention both of the President/Chair, Chair of the Compensation and Benefits (or other relevant) Committee.
2. District Presidents, for dissemination to District Board members.
3. District Field Service, RE, Extension, etc., Consultants.
4. District Compensation Consultants.
5. District Settlement Representatives.
6. District Good Offices Consultants
7. Professional Organizations

Conclusion

RECOMMENDATION 24

It is the Committee's conviction that meaningful compensation and benefits guidelines having ongoing utility for our member congregations must be the result of a continuing cooperative process involving professional compensation consultants, congregational lay leadership, the UUA Administration, Board and the new Committee on Compensation and Benefits.

Many fact situations have been illuminated and many questions raised by the process employed by the Committee. Its members appreciate that the scope of its charge was not any wider, but we respectfully suggest that the Board of Trustees may wish to consider setting up a task force with limited tenure to consider questions such as:

1. Where are our growth trends rooted and where are they pointing us as a religious movement?
2. Are there ways in which we might incentivize our professionals (other than compensation) and our congregations in ways we have not identified?
3. Money doesn't solve all problems, but it certainly eliminates worry while we work on comprehensive solutions to the problems. Do congregations need help in getting a better handle on fund raising, congregational financial planning, financial management, capital and endowment projects, etc.

We all have learned there is much which is uncertain in our lives and our world. Our faith in and our commitment to the search for truth exists in the realization that that search will never end. The members of your Committee may occasionally have indulged in the not altogether unhealthy fantasy that we would find an unassailable formula, appropriate to each congregation's situation, which was fair to each professional, and honored our value system. That formula which would be easy to identify on the basis of some readily measured comparable, which would be easy to apply, which would be greeted on revelation by the Committee with a chorus of, "Oh—of course!"

We all knew better, right? So let us study this proposal and get the sense of it. Let us begin to try it, to see if we can make it work in our home congregations. We all know we could find things wrong with it—inconsistencies, costs our congregations cannot afford, counterproductive impacts on individual professionals, etc., etc. It is not perfect, but it is just right for us, because neither are we. Your Committee, however, believes implementation of these recommendations will bring us all a little closer to perfection and, as we move in that direction, we will continue to improve on the substance of this proposal.

Our vision as Unitarian Universalists is to transform the world with a living truth, a loving justice, and works so good and lovely that they endure and are a beacon to all. Let us begin with ourselves congregation by congregation, district by district, and let that accumulate to be a testament to courage and enlightened vision, rainbowed and healthy and empowered to face the promises and challenges of a new and uncertain century.

APPENDIX A

The Survey

The Compensation and Benefits Survey:

In February 1993, 969 surveys were mailed to Unitarian Universalist congregations.

By May 1993, 520 were returned. (Of those returned surveys, 444 were from congregations with paid staff and 76 from congregations with no paid staff.)

Towers Perrin believes that the number of responses gives a very reliable sample of Unitarian Universalist congregations.

The results of the survey were summarized in the Committee's report, *The Price We Pay*, mailed to each Unitarian Universalist congregation in the U.S. in November 1993.

Key Survey Findings

- 1. There are four distinct types of Unitarian Universalist congregations, each with its own culture and practices regarding compensation and benefits.**
 - **Small congregations without full-time professional leadership (under 75 members, budgets of under \$50,000) constitute about 25% of Unitarian Universalist congregations.** When there is staff, compensation levels are generally low. Benefits are usually not provided, or nominal for the minister. There are usually no benefits for other staff. Only 14%, for instance, provide a health plan.
 - **Small congregations with full-time professional leadership (75 to 149 members, budgets of \$50-99,000) also make up about 25% of Unitarian Universalist congregations.** Staff priority is for a parish minister, who carries broad responsibilities for congregational life. Compensation for the minister is modest. She/he receives some benefits, but usually none is provided for other staff. Only 34% of these congregations provide health insurance.
 - **Medium sized congregations (150 to 499 members, budgets of \$100-299,000). Have full-time professional leadership. Make up 42% of Unitarian Universalist congregations.** Diverse patterns, but emphasis is on the parish minister who is usually the only full-time staff person. Compensation levels are average. Staff members worry about how to avoid direct competition for limited resources. Benefits are usually provided for the minister, but only on a limited basis for staff, if at all. 46% provide health insurance.
 - **Large congregations (Over 500 members, budgets of \$300,000 and up). Multi-staff configurations, make up 8% of Unitarian Universalist congregations.** Compensation levels are higher than other groups. Staff and ministers receive comparable benefits. 62% provide health insurance.
- 2. Congregation size determines compensation and benefits received; most Unitarian Universalist congregations are small.**
- 3. 86% of Unitarian Universalist ministers are over 40. The majority do not receive adequate benefit programs to protect them during their active service or to provide for them when they retire.**

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4. **Other Unitarian Universalist professionals — religious educators, administrators, musicians — are even more at risk.**
 5. **Compensation for the same position in otherwise similar Unitarian Universalist congregations varies widely, suggesting we have paid little attention to coordinating compensation and benefits practices.**
 6. **We provide benefits at only half the level of comparable denominations (United Church of Christ, Episcopalian, Presbyterian).** With regard to ministers, for instance, benefits coverage is provided as follows:

	<u>Per Cent of Unitarian Universalist congregations</u>	<u>Per Cent of comparable Denominations' congregations</u>
Health Insurance	41%	71%
Life Insurance	35%	82%
Disability	39%	66%
Pension	49%	62%

7. **Our attitudes about compensation and benefits matters indicate our confusion about how to deal adequately with these issues:**
 - 72% of respondents said they were comfortable discussing compensation with their staffs, but only 56% encourage open dialogue.
 - 90% believe in performance reviews, but only 30% have established clear pay and benefit policies.
 - Fewer than 50% of congregations report they understand how to manage the compensation process fairly.
 - Small congregations feel they compensate at an inadequate level.
 - Fewer than 40% of congregations feel their benefits meet their minister's needs.
 - 71% feel they are doing what they can to provide for ministers and staff members.
 - 71% want information about how to assess and manage performance.
 - Almost 50% say they need help setting initial salaries and in dealing with health care and retirement plans.

APPENDIX B

More About The Regional and Other Meetings

Format

The regional meetings followed a standard format with the same information shared and the same questions asked at each meeting so the responses received would be comparable. The meetings took place on Saturdays from 9 a.m. to 3 or 4 p.m. At least two Committee members participated in each Regional Meeting. Attendance at the Regional Meetings ranged from 15 to 70, averaging in the mid 30s, with lay leaders constituting (as desired) 2/3 to 3/4 of those in attendance.

The Schedule for the Day

In the first part of the morning session, Committee members provided an overview of the Committee, its charge and purpose. Confidentiality was assured. The survey findings were reviewed. Basic compensation and benefit issues and practices were outlined.

Later in the morning small groups were formed. Lay and professional leaders were assigned to separate groups. The lay groups were broken down by congregation size. Leaders and recorders were appointed for each group. Group session participants reviewed sixteen questions relating to compensation and benefit practices in Unitarian Universalist congregations.

In the afternoon session, the small groups formulated group recommendations growing out of the morning sessions. Later on in the afternoon, participants came together to hear and comment on the reports from each of the small groups. The written notes and presentation materials were saved for use by the Committee. Evaluations of the day were received. All were thanked for their participation.

Our thanks

The Committee wants to express its appreciation to all those congregational leaders who attended and participated in the meetings, giving up some pretty nice Saturdays to do so. We also want to thank the congregations which hosted the meetings. Your help has been — and we hope will continue to be — incredibly important to this process and to our hopes that we can act together to improve greatly how we deal with compensation and benefits issues in Unitarian Universalist congregations.

Other meetings

The other presentations and hearings took place over different time frames, usually using some of the materials developed for the regional meetings. Discussions at these meetings were not rigidly structured. We are, of course, also thankful to the participants in these meetings.

Information from other denominations

Additionally, the Committee has learned a good deal by having conversations with representatives of other religious denominations — UCC, Episcopalian, Methodist, Presbyterian, Baptist, Reform Judaism and Seventh Day Adventist. Fortunately, many others

have wrestled with these issues before us. Many good models and practices have already been developed that we may use.

Unitarian Universalist sources

Finally, we want to acknowledge the support we have received from other Unitarian Universalist committees, boards and agencies. We seem to have entered into a time within our own Association when we are willing, and perhaps even anxious, to talk to each other about compensation, benefits, staffing and professional development issues.

Our thanks to the UUA Board ; the UUA Administration; the Departments of Ministry, Religious Education, Extension, Finance and Development; the Unitarian Universalist Ministers Association, Unitarian Universalist Retired Ministers Association, Liberal Religious Education Directors Association, Association of UU Administrators, Unitarian Universalist Musicians Network; the Council on Church Staff Finances, Ministerial Aid Fund Committee, Pension Committee; the Unitarian Universalist Funding Program and to all those who have written in with their ideas and hopes or attended one or more of our meetings for their involvement in this process.

**REPORTS BY TOPIC FROM REGIONAL COMPENSATION FOCUS GROUPS AND
MEETINGS: SPRING, 1994**

(And from earlier studies and other sources)

There is a lot to read and understand here. We urge you to take the time to do so.

You will note that we have not been able to address all the recommendations in this report, but they merit ongoing consideration.

Basics: Budgets

Provide prudent budget profiles for different sizes of congregations, illustrating what can assume for fundraising and canvass.

— Mid-Sized Congregations Group, Washington DC, June, 1994

Basics: Cooperation & Networking

Encourage compensation and benefits discussions and evaluative procedures between societies in Districts.

— Large Congregations Group, New England Meeting, March, 1994

Promote cooperation among congregations; less inward, insular thinking. Examples: shared ministry, shared programs, adult RE service, teen programs.

— Metro NY Meeting, May, 1994

Get us together to exchange information.

— Large Congregations Group, Washington DC, June, 1994

We need more meetings of staff from the congregations in the region to share information.

— Professional Group, Washington DC, June, 1994

Basics: Education/Training

We need training and models in compensation, job descriptions and evaluations (free to the local church).

— Medium Sized Congregations, New England Meeting, March, 1994

Devote an entire issue of the World to all aspects and issues of compensation, fair employment practice, and funding in our congregations. Purpose: to inform a broad sector of members, to change attitudes toward funding and compensation, to create different expectations regarding ministry and staff roles and job descriptions.

— Professionals Group, Pacific Northwest, April, 1994

We want training on human resources through books, audio-visuals, and other means. Send Prospectus and information sheets to congregation leaders.

— Large Congregations Group, Washington DC, June, 1994

Basics: Funding

Benefit subsidy program for struggling congregations as an investment

— Lay Leaders, Small Society Group, Pacific Northwest, April, 1994

UUA fund to aid small churches with their staff compensation
— Lay Leadership Group, Southwest Meeting, May, 1994

Basics: Fundraising

Criteria regarding what is expected of a member.
— Small Congregations Group, New England Meeting, March, 1994

Role of minister in fundraising — Spiritual vs. Asking for \$
— Metro NY Meeting, May, 1994

We need a paradigm shift in fund raising. Terry Sweetser model. Raise funds for the vision. Give what's right, not what's left. Aspire to quality. UU s have a wonderful idea — liberal religion. Let s do something that is worthy of us. Stop being secretive about what is being given.
— Professional Group, Washington DC, June, 1994

Basics: Growth

But if our ministry is to be in a healthy condition, and is to appeal to able, self-respecting men who intend to give their families advantages of health and education, there must be a considerable number of our Churches — from one-third to one-half of them — paying such [supporting] salaries: parishes to which a younger man can hope to be promoted as he grows in ability and experience. This means at least doubling the number of such Churches...
— Report of the Committee on Unitarian Ministerial Salaries, 1915

The UUA should ensure that Ministers/DRE s/Administrator receive training in growth and fundraising — if possible, at the seminary level
— Professional Group, Pacific Southwest Meeting, March, 1994

Growth —> Increased \$ —> Increased compensation, but not in even jumps. Growth causes staff expansion rather than salary increases.
— Lay Leaders, Medium Sized Cong., Pacific Northwest, April, 1994

Basics: Leadership

It is most necessary of all that the officers of our local parishes assume responsibility in this matter. We need in every parish laymen who will make it their special responsibility to see that everything possible is done to pay the minister an adequate salary. Again and again, the salary is inadequate because of a lack of attention which such laymen can correct.
— Report of the Committee on Unitarian Ministerial Salaries, 1915

Basics: Most Important Issues

Guidelines/standards/formula. Values (worth of the individual) vs. Actions (low pay and benefits).
— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

The most important thing is to educate societies about these problems — consciousness raising. We UU s don't ask enough of ourselves.
— Lay Leadership Group, Southwest Meeting, May, 1994

Provide reasonable minimum standards for insurance and retirement benefits. Carrots

and sticks for churches to provide these minimums. A UUA fund to help
— Lay Leadership Group, Southwest Meeting, May, 1994

Basics: Quality

If we want to get and keep quality ministers, we have to compensate them adequately. Worry about money saps energy. Adequacy of compensation may not be why you take a job, but it is why you leave it. Quality people may not go into ministry [unless they can expect adequate levels of compensation].

— Professional Group, Pacific Northwest, April, 1994

Basics: Reactions to the Survey Findings in *The Price We Pay*

Wide range — Angry, anxious, grateful that it is being addressed.

— Professional Group, Pacific Southwest Meeting, March, 1994

Frightening to see low compensation and older ages for so many of our ministers. Does not encourage young people to go into ministry. Concern that RE people are paid less than school teachers and less than other staff.

— Professional Group, Southwest Meeting, May, 1994

Basics: Talking About Money

Education/Curriculum around our ambivalence about money.

— Professional Group, New England Meeting, March, 1994

Money is a form of communication; communicating a value.

— Towers Perrin, June, 1994

Basics: UU Culture

We have embraced a culture of poverty. We don't look to see how we can maximize what we can do. Our attitude is We can't afford to.... Our attitude should be What is the best we can do. How do we break out of this.

— Professional Group, Washington DC, June, 1994

Basics: UU Values

One of our primary concerns is that we reconcile UU Values (worth of individual) vs. Actions (low pay and benefits)

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

The Association needs to hold up the nature of our relationships and culture, our values, in a strong way.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994

Church as a model employer

— Metro NY Meeting, May, 1994

Basics: What Can We Change

Shift in focus of budget. What we need; not just what we think we can get.

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

Congregations need to stop doing it as we have always done.

— Professionals Group, Pacific Northwest, April, 1994

Benefits: Continuing Education

Benefits that provide: continuing education funding.
— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Benefits: Education Debt

UUA repay education debt based on the number of years served in ministry (balloon payment after a certain number of years of service)
— Small Congregations Group, New England Meeting, March, 1994

Benefits: Health Insurance

Give grants or loans for subsidies to churches rather than minister... to educate churches that health insurance is a legitimate expense for congregations to provide for ministers. Provide a higher allowance...for psychological care. [Now, \$500/yr.]
— Survey, Mid-Sized Church Conf., Kansas City, MO, March, 1994

Benefits: Minimum Standard Benefits

All employees working over 20 hours per week should receive benefits. These benefits should be prorated based on number of hours worked. Suggested benefits include: health insurance, life insurance, disability and retirement. While the prioritization of benefits offered should remain at the congregational level, we recommend that health insurance be given the highest priority.

— Large Congregations Group, New England Meeting, March, 1994

Consensus of Group: Health, Retirement, Disability are/should be mandatory minimum benefits for all staff (at any/some level of employment)
— Professionals Group, Pacific Northwest, April, 1994

Every church should provide: insurance—health, life & pension (retirement).
— Lay Leadership Group, Southwest Meeting, May, 1994

Benefits: Pension/Retirement Plan

On July 1, 1993, we moved from quarterly to daily valuation of our retirement accounts. On September 1, we enhanced our toll free benefits phone to allow participants to access their accounts on a daily basis to determine account balances, initiate Tax-Sheltered Annuity Plan loans and reallocate account balances and new contributions between the various funds.

— Report, Presbyterian Church in America, September, 1993

A pension plan, with a church contribution of 14% of salary basis, which is (a) at least 130% of cash salary plus any furnishings allowance for those living in a parsonage, or (b) cash salary plus housing allowance for those with such allowance.

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Benefits: Retirement Planning

Retirement is the biggie for me — and for you.
— Professionals Group, Pacific Northwest, April, 1994

Benefits: Retirees

[Because we have made Cost of Living adjustments], every beneficiary of the Church Pension Fund is receiving a benefit at least equal in purchasing power to the benefit they received when the individual pension began

— Report, Episcopal Church Pension Fund, September, 1993

The minimum retirement income for lower income annuitants under our supplementary plan was raised from \$15,000 to \$15,600 in 1993. The minimum includes regular pension and social security and applies to a member or couple with 30 years of service retiring at age 65.

— Report, United Church of Christ Pension Boards, September, 1993

Benefits: Sabbaticals

Benefits that provide: sabbatical education funding.

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Benefits: Salary Reduction Plans

All congregations should participate in salary reduction (Section 125) plans, such as the dependent care assistance plan used by the UUA.

— Large Congregations Group, New England Meeting, March, 1994

Career Path

Therefore, the chances of one of our ministers receiving a supporting salary are ten times as great if his Church is in a large urban center. It follows, inevitably, that a considerable number of our men working in smaller cities and towns become anxious and eager to move when they approach the time when they are under obligation to provide a large income for their families, and, if possible, send their children to college.

— Report of the Committee on Unitarian Ministerial Salaries, 1915

Need career counseling

— Lay Leadership Group, Southwest Meeting, May, 1994

Compensation: Comparables

The question is often asked, How do Unitarian ministerial salaries compare with those in other denominations? Such comparisons are difficult to make. Most of the other denominations have a considerable proportion of their churches in rural areas, or in the South, where living costs are low. Furthermore, having a much larger number of adherents, they usually have several churches in a city, while we very often have only one; in such a community the one Unitarian Church competes, not with the average churches of the other denominations, but with their leading churches; and the salary of the Unitarian minister should be compared, not with the average salary received by other ministers in the city, but with the salaries of those leading ministers, whose ability and reputation it is his responsibility to equal.

— Report of the Committee on Unitarian Ministerial Salaries, 1915

While the ministry is a unique profession requiring special patterns of financial compensation, several overall factors can be considered in determining the support for clergy.

The total compensation package could justly be comparable to the median income of the parish and perhaps on a par with that of the local high school principal, showing consideration for years of service, special skills, and training and including annual cost-of-living increases. The federal tax structure is unique for clergy and the compensation package can be designated in a way to maximize the pastor's income.

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Ministers need to be compared with ministers and not high school principals.

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

Minister's compensation comparable to church members. Minister's compensation comparable to ministers of other denominations in the area.

— Lay Leadership Group, Southwest Meeting, May, 1994

Compensation: Data/Survey

Create the format for a repeatable national compensation survey for ministers and major staff positions covering: base salary, benefits, housing (comparable valuation methods and cost of living data).

— Medium Sized Congregations, New England Meeting, March, 1994

Size of the average pledge needs to be part of data.

— Professionals Group, Pacific Northwest, April, 1994

Compensation: Equity Among Staff Members

Use benchmarks/guidelines for each staff person. Set amounts at congregational level; establish personnel committees or compensation committees to look at all staff positions. Perhaps, at least in large congregations, establish minimum and maximum levels for each position. The minimum for a full-time person = the ability to afford appropriate housing.

— Large Church Group, Metro NY Meeting, May, 1994

Compensation: Guidelines

The UUA should regularly disseminate information to all congregations on fair compensation levels and practices.

— Professional Group, Pacific Southwest Meeting, March, 1994

Data comparisons based on total compensation. Consider: experience, budget, cost of living in the area.

— Small Congregations Group, New England Meeting, March, 1994

Compensation: Housing Allowance

Housing that provides: a furnishing allowance, all utilities, and an equity development plan for those living in a parsonage; OR, a housing allowance including furnishings and utilities for those who rent their own homes.

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Compensation: Marketplace/Oversupply of Ministers

Need to address ministerial oversupply and supply and demand issue

— Lay Leaders, Medium Sized Cong., Pacific Northwest, April, 1994

Compensation: Minimum Standard

The truth is that many of our Churches pay a salary which today is really adequate to support only an unmarried man without dependents. That would be sufficient if we believed in a celibate ministry,...

— Report of the Committee on Unitarian Ministerial Salaries, 1915

UUA should not provide settlement services unless a congregation meets a minimum compensation and benefit standard.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994

Compensation: Other Income

In considering the subject of ministerial salaries, certain irrelevancies should be thrown aside, such, for example, as the fact that some of our ministers receive a private income, or are married to women with such incomes.... It should still be a principle among us that, as Paul wrote, the laborer is worthy of his hire, or as our New England predecessors would put it, the minister is to receive his living.

— Report of the Committee on Unitarian Ministerial Salaries, 1915

Compensation: Social Security Tax Allowance

The church should provide an amount equal to at least one-half the effective self-employment SS tax liability of each clergyperson. This allowance is taxable income but will ease the burden of the big Social Security tax.

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Compensation: Trend

We have thus translated the average Unitarian minister's salaries for the period 1890 to 1941 into the amount of goods which his salary at the 1925 level of purchasing power would have commanded at each of the years under review. We have also done this for faculty salaries, for the money wages paid to factory wage-earners, and for the incomes of Government employees in the District of Columbia. The results are striking.... With the exception of the period during the great depression...the real income of Unitarian ministers has shown an actual gradual decline since the last decade of the last century.... It stands today at almost exactly the all-time low of 1921, which means that the average Unitarian minister is receiving nearly 30 percent less in real income today than his predecessor fifty years ago. Over the same period, the real income of wage earners and of Government employees has shown a remarkable growth; faculty real income has also shown an increase.

— Report of the Committee on Unitarian Ministerial Salaries, 1943

Compensation: Work Schedule

The work schedule of local pastors be a maximum average of twelve units per week with no more than three evenings in any given week; in addition that pastors take off at least three consecutive days each month. (A unit is a morning, afternoon, or evening.)

— Guidelines for Clergy Compensation 1994, 194th Annual Meeting, Massachusetts Conference of the United Church of Christ

Difficulty in distinguishing staff time and volunteer time. Most RE leaders volunteer

much of their time over paid hours. Work follows us home.

— Professional Group, Southwest Meeting, May, 1994

Congregation: Compensation and Benefits Committee

Yes — with information from district — well informed committees

— Professional Group, Pacific Southwest Meeting, March, 1994

The only source of information in most congregations is the minister — and it feels self-serving to ministers and lay people.

— Professionals Group, Pacific Northwest, April, 1994

District Board: Role

[Help in] developing of congregational vision: creative, renewable, hopeful, transformation, change agents (instead of a vision of surviving)

— Metro NY Meeting, May, 1994

District: Compensation Committee

District level (multi-district) resource for compensation and benefits to provide updated information to and consultation with local congregations.

— Small Congregations Group, New England Meeting, March, 1994

Yes, as a function (not necessarily a committee)

— Lay Leaders, Medium Sized Cong., Pacific Northwest, April, 1994

Establish a district compensation committee of trained people with strong lay presence, also other staff representatives to: (a) teach congregations to be good employers, (b) get information out into all congregations and put some pressure on those below standard, (c) teach specifics of compensation management, (d) write own district manual of church staff compensation; prepare our own information and statistics, (e) help negotiate and initiate with congregations regarding whole staff compensation and benefits, working with MSR to reach search committees.

— Professionals Group, Pacific Northwest, April, 1994

District level committee is a very good idea. Lay people best. Professionals and ministers consulted.

— Professional Group, Southwest Meeting, May, 1994

District: Evaluation Committee

Yes. Outside input is good. Depends on the composition of the committee/specialist. Give business management advice. Resource availability is more important than a committee per se. Voluntary request only.

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

Yes. Gather and maintain regional data to assist congregation in evaluation of staff — performance, systems, training, benefits

— Lay Leaders, Medium Sized Cong., Pacific Northwest, April, 1994

No.

— Lay Leadership Group, Southwest Meeting, May, 1994

District: District Executives

Urge District Executives to take an active roll in keeping congregations and professionals informed about compensation and benefit issues.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994.

District: Financial Advisor

Provide regional accountants, who can respond to ministers' questions re contract packages for optimum tax benefits and, at tax time, how to file. Provide financial planning with emphasis on debt reduction.

— Survey, Mid-Sized Church Conf., Kansas City, MO, March, 1994

Recommend a district consultant for finances and another for staffing. Disseminate current information. Be trained. Educate congregations on compensation. Provide better communications of information to lay people.

— Professional Group, Washington DC, June, 1994

Evaluation: Congregation and its Staff

Yes — as long as it's understood that the evaluation includes staff, board and congregation. The whole congregational system.

— Professional Group, Pacific Southwest Meeting, March, 1994

— Lay Leaders, Small Society Group, Pacific Northwest, April, 1994

Evaluation: Based on Job Description

Every congregation should have job descriptions for its employees. Evaluations should be based on yearly goals which support the job descriptions.

— Lay Leadership Group, Southwest Meeting, May, 1994

Evaluation: Process

Churches need to explore various models to develop appropriate evaluation procedures for their situations. Possibilities are: (a) job descriptions and attendant evaluations, (b) goal setting processes with on-going evaluatory updates.

— Large Congregations Group, New England Meeting, March, 1994

Collaborative and non-adversarial review process for staff.

— Professional Group, New England Meeting, March, 1994

Leadership Development: Professional and Lay Leaders

Arrange for leadership development courses in settings where all church leaders — professional and lay — can attend.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994.

Leadership Development: Students

Career counseling at least a year before graduation — with too few churches available many graduates have to take menial jobs or live in desperate circumstances before being settled.

— Survey, Mid-Sized Church Conf., Kansas City, MO, March, 1994

Fellowship Committee needs to put church administration and finance on its grid for ministry. Candidates need to know this.

— Professional Group, Washington DC, June, 1994

Professional Expenses

Educate congregations that adequate professional expenses are an essential budget item for supporting church programs and are not part of minister/staff compensation.

— Professional Group, Pacific Northwest, April, 1994

Resources: Educational Materials

Manual - Clearly Written (Above and beyond the Green Book)

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

Provide more materials directly to congregations on compensation and benefits issues.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994.

Resources: Guidelines for Staffing

Since it affects compensation for all, how do you determine just how many professional staff and how many support staff are needed — and can be adequately supported — by a congregation.

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994

Small Congregations: General

One of the most important things we need to address is how to provide ministerial services to small congregations...Association subsidy? Shared ministry?

— Lay Leadership Group, Pacific Southwest Meeting, March, 1994

Small UU groups might become part of another group, i.e., merge. They may be able to pay better as a larger group.

— Small Congregations Group, New England Meeting, March, 1994

Smallest congregations don't have resources and don't/can't talk of it.

— Professionals Group, Pacific Northwest, April, 1994

UU institutional policy has been and is to encourage formation of untenable congregations, i.e., too small to adequately compensate and be good employers. Newer Extension Department policy is for growth to adequate size, but not enough tools for growth are made available.

— Professionals Group, Pacific Northwest, April, 1994

Small Congregations: Alternative Models for Ministry and Staffing

The committee should also recommend alternative models of ministry.

— Ministerial Working Group, UUA Board

— Lay Leaders, Small Society Group, Pacific Northwest, April, 1994

Shared administrative staff. Shared ministry. Outside contracting of administrative duties such as bookkeeping. Sister congregations for new startup congregations or for smaller churches.

— Lay Leadership Group, Southwest Meeting, May, 1994

UUA: Compensation Committee

There needs to be an ongoing compensation committee at the continental level!

— Meeting Area Ministers & Students, Meadville Lombard, May, 1994.

APPENDIX C

Staff Position Descriptions

Director of Religious Education

This group of religious professionals is perhaps the most difficult to describe. In our Association it includes (as a title) everyone from a nominally paid volunteer to a full time trained and certified career professional. The Committee believes we would all gain from a thoughtful development of types of religious educators, and compensation and benefits/expenses appropriate for each and all. Presently there are individuals with focused training for religious education and others without that background. Some have college degrees and others do not. Some degrees have a direct relationship to functioning as a DRE, others do not.

Our intention in these Guidelines is to identify a DRE who is a college graduate, with a degree that relates to the task of being a religious educator. Additionally it is a person who has entered into and seeks to complete further training toward certification as a professional religious educator. Any particular individual may fall below these Guidelines in education, training, or commitment to the profession, or an individual may exceed this description. What we are offering here is a "plumb line" description for the use of religious educator professionals and congregations to use as a gauge for their own particular situation and to help determine compensation parameters. The individual in these Guidelines has a strong commitment to professional religious education leadership and to congregations he/she might serve.

We recognize that the majority of DRE serve in part-time positions and their salaries and benefits will need to be prorated as discussed elsewhere in this report.

Business Administrator

A church Business Administrator in these Guidelines has the major responsibility for support personnel, facilities management, finance control and audit, and provides leadership to the Board of Trustees (or comparable governing body) and administrative committees. The Business Administrator exercises control of hiring and firing of support staff, some budgetary responsibility and works in collaboration with other religious professionals. Normally this person oversees the facilities and finances and exercises leadership in these matters. This person has a degree in Business Administration, or its equivalent.

This description is not proscriptive or exhaustive but is intended as a gauge. Some Administrators do not carry responsibilities as broad as these and some may exceed them.

Music Director

The responsibility of the Music Director is to develop the fullest and best use of music for services of worship, special services, and specified programs of the congregation. The MD is charged with developing and maintaining a music program which nourishes the congregation and is of professional quality. Normally the MD rehearses and prepares the choir(s), soloists, and other musicians for regular and special services (including rites of passage, as requested).

The MD consults with and works in collaboration with other religious professionals, staff, and appropriate committees. The MD has a college degree in music or its equivalent and is a music professional as well as a professional religious leader.

Assistant Minister

An Assistant Minister is usually inexperienced in ministry (a first ministry) and is often employed by action of the Board of the Congregation with a substantial involvement by the Senior Minister. An AM is usually under the guidance and supervision of another minister. Normally an AM is in good standing with the UUA Department of Ministry and is at least in preliminary Fellowship. An AM has a professional degree (or equivalent) in preparation and qualification for ministry.

Associate Minister

An Associate Minister normally has experience in ministry and is called by the congregation through a typical search process. An Associate Minister usually has independent responsibility for his/her ministry and may be the professional religious leader for designated areas of the life of the congregation. An Associate Minister shares the responsibility with a Senior Minister for the direction and ministry of the congregation and is expected to work collaboratively with other religious professionals. The Associate Minister is a fully qualified minister with a professional degree (or equivalent) and at least preliminary Fellowship standing.

Minister

Many of our congregations have only one minister. In such cases that person is usually designated as The Minister and carries a wide assortment of professional responsibilities — from worship to religious education to administration and adult education. There are, however, a number of different ways these tasks can be addressed in a congregation by religious professionals. Ministers may share a single ministry. They may be co-ministers and have a somewhat greater responsibility than that normally expected of one minister.

The general description of this category is a religious professional responsible for ministry to a congregation. The responsibilities may be carried out by an individual or by two or more persons. Normally the tasks are inclusive and broad based as is the case in most Small and Midsize congregations. The Minister has a professional degree (or equivalent) and is in good standing with the Department of Ministry and holds at least preliminary Fellowship.

Minister of Religious Education

An MRE is normally part of a professional team in a two ministry or multi-staff congregation. Responsibilities include religious education for all ages, but often go beyond these to include specific or broad professional tasks. There may be supervisory responsibilities for support staff to sustain the program and extensive work with committees and with training. Some MRE's are designated as Co-Ministers and others as Associate Ministers. Some are part of a multi-staff ministerial team and are expected to function in a context of parity of status and responsibility and others have defined responsibilities and work with a Minister or Senior Minister.

For purposes of these Guidelines we identify the category of MRE by the preponderance of data collected by our professional compensation consultants as Associate (level) Ministers whose primary task is the development and sustaining of a program of religious education for all ages. The MRE functions collaboratively with other religious professionals. There are congregations that designate the MRE as "in parity" with another minister and identify greater over-all responsibilities than the MRE in this profile. In that case the MRE should be considered in the same status and compensation category with the Minister and compensated accordingly.

The MRE holds a professional degree (or equivalent), is in good standing with the Department of Ministry and holds at least preliminary Fellowship.

Ministries of Differing Models

Such Ministries refer to those which function in multi-staff settings, carry large programmatic responsibilities, and oversight and supervisory responsibilities for other professional and support staff. These may include Senior Ministers, Ministers, Ministers of Religious Education, Associate Ministers, Directors of Religious Education, Business Administrators, Ministers of Administration, and other categories of comparative responsibility. The identifying feature here is those who carry out ministry in our larger congregations with extensive supervisory obligations. Some of these are ministries which are conceived of as "in parity" and others involve an oversight philosophy. The Committee makes no distinction between them. Those who carry out these levels of oversight and responsibility are not separated out by function – the scope of the task and professional religious leadership required define them.

Those in this category hold a professional degree (or equivalent), are in good standing with the Department of Ministry and hold (if appropriate) at least preliminary Fellowship.

Additional Staff Professionals

In an attempt to be comprehensive, we recognize that many multi-staff and midsize congregations have specialized staff that fit their particular program needs. These individuals work full and part time and usually have job titles like: Youth Advisor, Organist, Section Leader, Social Justice Coordinator, Bookstore Manager, Office Manager, Assistant to the MRE or DRE, Child Care Coordinator, and so on.

The work these professionals do is usually closely supported and supervised by another staff member (e.g., the Administrator supervises the Office Manager, the Music Director supervises the Organist), therefore we have put them on the Guidelines Chart at the entry stage of professional compensation.

APPENDIX D

Congregational Implementation and Maintenance of UUA Compensation and Benefits Guidelines

(A Brief "HOW TO DO IT YOURSELF" Manual)

Unitarian Universalist congregations located in the United States, wishing to adopt the UUA Compensation and Benefits Guidelines should consider the following program as a working model which may be adapted to their circumstances.

The Guidelines are effective with the issuance of this report and will be effective through the UUA fiscal year ending June 30, 1995, whereupon they will be updated to reflect current economic and other relevant conditions. If your congregation needs a current set of the Guidelines, please contact your District office or the UUA Office of Church Staff Finance.

Following are the initial and follow-through action steps necessary:

1. Adoption of the UUA Guidelines by the governing board and/or the congregation. Such adoption may be immediate, or the Guidelines may be adopted as a goal and a timetable established, by the final date of which they will be fully implemented. We recommend completing steps 2 and 3 following, prior to announcement or presentation to your congregation.
2. Appointment by the governing board of a Compensation and Benefits Committee, or assignment of such functions to an existing committee, such as Personnel, Finance, Administration, etc. The Committee will assume responsibility for the ongoing implementation of the program. It will maintain the necessary records with respect to each employee and to the current information necessary to administer the Guidelines.
3. If not already of record, job descriptions will be written for each professional position on the staff and such descriptions will be reviewed and approved by the governing board and by the professional with respect to each position. The Committee will determine, as the descriptions are written, whether each professional staff member is a full or part-time employee and, if part-time, the percentage which part-time represents. The 12 unit method for making this determination is set out in the Guidelines text, and compensation will be established, employing this percentage.
4. A regular (preferably annual) review process will be established for each professional position on the staff. This process will be informed by the congregation's own mission statement and the job description for each position. The elements to be reviewed, and the expectations for a) the incumbent professional and b) those elements of governance in the congregation which relate to that professional function, should be clearly set out and the governing board and the incumbent professional must be satisfied with them. The review process is intended to be a two-way exchange. The relevant committee(s) reviewing the professional, and the professional reviewing, in return.
5. The Committee will determine into which Guidelines category its congregation fits in terms of size and budget. Not every congregation will fit neatly into the Guidelines table. If assistance is required in resolving questions of appropriate placement, the District

Compensation Consultant will be available for that purpose. Technical questions of interpretation may be referred to the UUA Office of Church Staff Finance.

6. Each professional position on the staff will be reviewed and matched with the appropriate range on the Guidelines table, based on position description. Not every professional position will conform to the Guidelines position descriptions and, in these cases, reference may also be had to either the District Consultant or the UUA Office of Church Staff Finance.

7. The UUA Office of Church Staff Finance will, on request, furnish to each congregation the factor which will enable it to adjust the ranges set out on the Guidelines table to local cost-of living conditions.

8. Each year, as the time of the budget-making process approaches, the Compensation and Benefits Committee (or its equivalent in function) will;

- Ensure that the necessary information is available to update the Guidelines range amounts for each covered position and will review the data for the congregation to assign it to the appropriate category.
- Initiate the annual review process, participating with other relevant boards/committees as the congregation's governance structure may provide.
- On completion of the review process, a recommendation should be made by the Compensation and Benefits Committee to the budget-making authority, for compensation (salary, plus housing allowance, when applicable) and benefits provisions for the coming fiscal year.
- Following the review process, the Compensation and Benefits Committee shall assess the process and make recommendations to the governing board of the congregation for changes in the process or in specific job descriptions. The Committee may also make recommendations for modifications in the UUA Guidelines, or in the procedures relating to them; such recommendations should be lodged with the District Consultant and the UUA Compensation Committees.

9. At such times as new professional employees are to be added to, or replaced on, the congregation's staff, the Compensation and Benefits Committee will participate in the search or hiring process early enough to establish that the amounts of compensation and benefits to be offered will fall appropriately within the Guidelines. The Committee should also determine whether new job descriptions need to be written, and that the proposed new staff member is aware of the Guidelines and of the review process.

