

Guide for Ministerial Settlement Representatives

This Ministerial Settlement Representative Guide is a work in progress. It is also a work of many hands. Dale Arnink, Nancy Doughty, Carl Haag, Dan Hotchkiss, Brandoch Lovely, Deane Starr, Leon Hopper, Joan Schneider, Lisa Presley, as well as other, occasional hands, have contributed to its helpfulness, as other, newer hands undoubtedly will in the future.

Some of them will undoubtedly be yours. I invite you—urge you!—to contribute materials of your own (e-mail is best) to increase further the quality of the materials provided. T.S. Eliot wrote: “Great poets do not borrow; they steal.” And so do great MSRs!

In common endeavor,

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Services Provided by the Transitions Office in the Ministry and Professional Leadership Staff Group

1. By means of online materials, the annual GA Search Committee Seminar, Ministerial Settlement Representatives, and frequent communication, assist congregations in readying themselves for new ministry, presenting themselves openly and honestly, considering potential ministerial candidates, negotiating with their candidate, and settling their new minister.
2. By means of online materials, an annual GA workshops, and communication as appropriate, counsel ministers considering new ministry and assist them in presenting themselves openly and honestly to congregations of their choice.
3. Enable all ministers to participate in the “open market” of congregations in search, and encourage ministers who are especially likely matches to consider particular congregations.
4. Provide search committees with interpretive file summaries on their pre-candidates.
5. Provide rule interpretation on issues in ministerial transition.
6. Counsel ministers who are having difficulty in their ministry and work with ministers who are on hold for settlement or on restrictions.
7. Maintain, interpret and implement settlement policies and procedures; develop, maintain, and publish on the UUA web site the *Settlement Handbook*, the *Interim and Consulting Ministries Handbook*, all other publications and necessary forms; and maintain opportunity listings and records of settlement activities.
8. Appoint all Ministerial Settlement Representatives, plan and conduct their training seminars, and supervise their settlement activities and related expenditures.
9. Oversee the Interim Ministry Program by recommending appropriate interim ministers to churches in transition; plan and oversee the Orientation to Transitional Ministry and facilitate the Accredited Interim Ministry Seminar.
10. Share with other MPL staff attendance at collegial gatherings and the representation of MPL at General Assembly and other important and ceremonial occasions.
11. Advance anti-racist, anti-oppressive, multicultural policies and practices in all settlement and MPL work, and serve as a member of the Diversity of Ministry Team.
12. Maintain settlement information in the files of all living UU ministers, and current records of ministerial settlement on the departmental database.

Criticism in Ministry

The following piece may prove helpful to MSRs, both ordained and lay

Criticism. It's continual. No matter how you pretzel-twist yourself to please people, you fall short. And there are always helpful, caring people who will take the time to tell you so.

Most of us ministers are more affected by this than we show. The complainers, after all, are not mere customers. In our shop, there is no counter between us and them. With each concerned parishioner we connect in many ways. We pour ourselves out Sunday after Sunday, and sometimes they pour themselves out, too. So when "helpful feedback" comes, it can pierce our thin skin into the vital organs.

The worst thing we can do is overreact. Whether by proclaiming innocence or by announcing full reform, too strong a response ups the emotional ante. The old ministerial lore speaks of blood in the water that attracts the sharks. More recently, Ed Friedman cautions us to be "non-anxious." It doesn't always feel good, but it is a good idea when criticism comes to contain ourselves, to underreact.

Nor is it wise to enlist others to react in our behalf. This may be the chief mischief Ministry Committees get into. By setting themselves up as mediating bodies, by encouraging people to use them as a "conduit," they set up a classic triangle. No one (and certainly no committee) can be responsible for the relationship of two others. No one can respond to criticism of the minister except the minister.

I used to say to Ministry Committee members that if a member of the congregation came to one of them with a criticism of me, they should suggest the person speak to me directly. More recently, I have asked committee members to say: "Thank you for bringing that up. I will speak to Dan about it, and he'll be in touch with you."

If there is a magic formula for responding to criticism, I don't know it. It would require, I'm sure, perfect comfort with one's imperfections, utter common sense about what is real criticism and what is projection from the complainer's own life, and constant willingness to apologize. (Ministry, in my experience, means always saying you're sorry.)

In the end, the only real response to criticism in the ministry is more ministry. How can we meet your needs? How can we move forward? Let's plan together to do better in the future.

When we were ordained, we never promised to be perfect. But we promised to be faithful to our calling and to serve as best we can those who come into our care. Do that, and you're doing OK.

--Daniel D. Hotchkiss

Whom Do We Serve?
 a paper prepared by Dan Hotchkiss
 for discussion at the UUA
 February 8, 1994

Dan's paper is helpful to MSR's as they consider their moral compass in this work

No one can serve two masters: either you will hate the one, and love the other, or you will hold to the one, and despise the other. You cannot serve God and mammon. -- Matthew 6:24

Soon after I began working at the UUA, Peter Fleck asked me, "Whom do you serve, ultimately: ministers or congregations?" As he often does, Peter in a few words pointed to a tension close to the heart of the Association's work. The tension may be more apparent to observers of the UUA than to us as staff members. Our work is so much to reconcile, to harmonize and to find common ground among conflicting interests that we take it for granted this is possible. To the conflicted parties themselves however our rationales sometimes sound glib, our motives self-serving. Especially in conflict situations, each player wants assurance that someone in the system speaks for him or her. The more intense the conflict, the less likely the parties will welcome even a neutral mediator, much less an agent of some greater good defined outside the local conflict. It is important, then, that we understand and express clearly what responsibilities we have toward each of the persons and constituencies we serve.

This paper is an effort to define those responsibilities. While I will criticize some things I have heard or seen, most of what I have to say will simply clarify the way we operate already. I write in the belief that clearer conversation about roles and motivations will help us to communicate with one another and with our constituents what we are trying to accomplish, and for whom.

The issue of the UUA staffs obligations toward various parties comes up continually. Here are a few recent examples:

- Some District Executives define themselves as advocates for congregations, in contrast to UUMA Good Offices Persons, who defend ministers. While the Department of Ministry has never accepted such a partisan role, lay leaders sometimes complain that we defend ministers, while ministers sometimes complain that we don't. Should we embrace an adversary system or resist it?
- A congregation in conflict with its minister received advice from its District Executive and the Department of Ministry that seemed biased toward the minister. An angry member wrote to the UUA Board of Trustees to ask, "Who represents the congregation?"
- The new Career Development Director position in the Department of Ministry revives an old question: Can the Department offer "counseling" to ministers when it exercises such strong influence on their careers? With so much of the Department's energy now going into disciplinary matters, with whom can a minister be candid about doubts, mistakes, and temptations?

In answer to these and similar questions, I believe it is important to be clear: the UUA's concern is for the health and effectiveness of the UU movement as a whole. This interest is not subordinate to the needs of any minister or congregation.. We should ground our work in a broader vision of the whole, and never hire ourselves out as "advocates" for ministers or congregations. The movement prospers only when it has effective congregations and happy, productive ministers. The Department of Ministry's mission statement commits us to promote "a ministry of excellence," and ministry is something ministers and congregations do together. Especially in conflict, when parties see their interests as opposed, the UUA's role should be to represent our common interest in a fruitful partnership.

One easy answer to Peter Fleck's question, "Whom do you serve?" is that UUA ultimately serves congregations--but then so should ministers. A congregation ultimately should serve not itself but the faith. A congregation's final goal is neither its own corporate well-being nor the private interests of its members, but the fulfillment of its purposes through means selected in adherence to its principles. To supplant that goal with something smaller or more partisan sells the founding genius of our institutions short.

Of course no one can quite define "our" purposes. Even the official, stated purposes we adopt from time to time are at best faulty approximations. Still, to paraphrase Paul Carnes, while we may never know completely what our purposes are, we can sometimes recognize what they are not. Accordingly, I have come up with the following three suggestions to guide us in balancing the UUA staff's responsibilities toward various pans of our clientele.

Principle #1: We should resist defining ourselves as adversaries

We should resist any movement toward an adversary system where UUA staff become "hired guns" for churches or for ministers, for RE or music, or for any other interest smaller than the good of the whole movement. To do so undermines our power to be a third, uniting element in conflict situations. Even when we choose to press a minister to resign or a congregation to provide a generous severance package, we should be explicit that we do so for the health of the movement as a whole.

It is easy to set ourselves up as adversaries, not only because the "adversary system" is part of our common culture, but because it simplifies each player's loyalties. A District Executive who vows always to be "for the congregation" never has to worry about the congregation's duty to help make our ministry livable. A UUMA Good Offices Person who becomes simply an advocate defaults on the collegial obligation to admonish and correct as well as to support and succor. Should the Department of Ministry become merely an agency for ministers, we offend the trust of congregations, without which we could do little.

An adversary system simplifies hard choices, but the complex balancing of interdependent interests is important. The purpose of the UUA is to serve the whole UU community. In place of any adversary understanding, our watchword should be Jack Mendelsohn's familiar dictum that "great congregations and strong, effective ministers . . . create each other."

Principle #2: We should avoid compartmentalizing care from power

I am distressed by the suggestion, made repeatedly, that we should assign the exercise of power separately from the responsibility of care--with some UUA staff members assigned to be the "heavies" while others get to be Mr. or Ms. Nice-Guy. At best, this idea embodies a

fastidious dualism of sweet versus strong. At worst, it leads us into an unthinking game of Good Cop-Bad Cop, with the carer pretending not to have power and the power person free of the duty to be caring.

A better starting point is the first principle as stated in our by-laws. Each person's "supreme worth and dignity" dictates that we should treat every party with respect and on terms of social equality. When we use power, respect for each person should temper the arrogance and presumption that so often go with power. It should also mean that we do not allow official roles and obligations to eclipse us as autonomous moral agents or as human beings. As we use power or balance power interests we should all offer support and empathy to those with whom we deal. I believe this is habitual with most of us, but it's worth stating because sometimes we are urged to separate the two.

Principle #3: We should avoid making promises that conflict with our basic responsibilities

I am thinking here mostly of the promise implied by the word "counseling." In ministry, this word normally implies a confidential relationship where the client's interests are paramount. We would condemn a psychotherapist who sold securities to clients or reported to their employers: the counseling relationship should be free of conflicts of interest. No UUA staff member can be a counselor, in this narrow sense, to a UU minister. While we wish all our ministers well, we cannot honestly claim exclusive dedication to their interest. We balance the private interest of ministers against other legitimate claims. We serve ministers best when we are frank about this. Our basic commitment as UUA staff is to the health and effectiveness of the whole movement, not to any one person.

Virtually all UUA staff provide "counsel" in the broad sense of information and advice. The new Ministerial Development Director will go further, discussing ministers' career plans in order to help them fulfill themselves as persons. But as a member of the Department, he will influence decisions and represent a larger set of interests as well. In our eagerness to court favor politically, we need to be careful not to promise that anyone on the LTUA staff is all grace and no judgment.

Our basic loyalty as UUA staff is to the good of the whole movement. It would be disingenuous to pretend we were creatures of pure heart, immune from influence by worldly powers or the lure of mammon. Like other men and women, we have "laughed or wept, [been] married or in love, or commended, or cheated, or chagrined." These and other facts of our biographies make us partial in all sorts of ways. But in most situations, we are favorably placed to represent the larger view. Our private and institutional self-interest aligns well with the long-run health of our ministers and congregations. We see the achievements of healthy, effective ministers and congregations, and how at best they reinforce each other. Over time we see the consequences when any one legitimate priority prevails at the expense of others. We can, in this association of free hearts, speak for the common good. At least we ought to try.

"The Changing Ministry of Information"

John H. Weston¹

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There have always been problems with the ministerial search and settlement process. Here's what the problem used to be. Many years ago a ministry staff member solicited the opinion of an influential minister of a prominent church. Was a certain young cleric ready to move up? Here is the reply he received in full, with a detail or two omitted or changed:

I have yours of the 22nd regarding the application of "Andrew Paul." Three years ago I helped to ordain him. He is a likable, little, colorless, well-meaning man. So far as I can see he has no brain at all. He is fond of music, and comes from a good family. I mean by that, they are good, earnest, hard-working, right-minded, humble people. The Council who ordained him did their work in a temperature of 17 degrees below zero, modified by such calories as a pot-bellied stove in the basement of the Church could furnish. The situation was not provocative of careful deliberation, but even so, his ordination was a touch-and-go matter so far as the Council was concerned. And one or two members have spoken of it to me since as a sort of joke, all of which means if I were you I would go slow. I don't know why he should not stay where he is.

Was ever a throat more elegantly slit? Issues of style and savagery aside, the presence of the letter in the young cleric's file raises hard questions. Search committees want to know, will the UUA foist off so hopeless an incompetent on them? Ministers want to know, how many (albeit more pedestrian) such letters lurk in their files, undoing their opportunities? And all who care for our ministry want to know, was the young cleric, even if only half so inept as presented, allowed simply to stew in his own juices in a long, lukewarm career? Were no correctives offered, no resources?

ii.

Now let me turn to more recent problems in four cases.

Case 1. A member of a congregation's ministerial search committee speaks bitterly of its unsuccessful search for a new minister: "We were told that there just weren't many ministers wanting to live in our community. Our group medical practice faces the same problem. But our medical practice is able to reach out and persuade physicians that they *do* want to live in our community. Why can't our search committee do that, too?"

Case 2. A minister recalls with anger and dismay the afternoon when, a congregation's ministerial search committee becoming interested in her, a UUA staff member "sat me down and for half an hour told me all the reasons why I could not effectively serve that church." The minister is now one of the most widely admired in the Association, and her ministry with that congregation one of evident mutual regard. Is the error in prognostication due merely to inevitable human fallibility, or does it point to a systemic problem? How great a role should the judgment of a member of the UUA staff, substituted for that of search committees and ministers, play in the settlement process?

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Case 3. A minister who several times sexually misconducted himself in the congregation he served in the days before such behavior sparked Ministerial Fellowship Committee review was rusticated—sent to a little church in the country--instead. That's what used to be done. Despite the minister's acceptance of responsibility, his undergoing assessment and rehabilitation, the absence of repeat incidents, and demonstrated ministerial effectiveness, years later the odor of past insensitivity still clings. A search committee, catching a whiff, raises questions. What should be said, and not said? And should the UUA wait for questions?

Case 4. In the three evaluations preceding final fellowship a new minister was consistently cited by her congregation's leadership for insufficient and empathy, defensiveness in the face of criticism, and lackluster preaching. The Ministerial Fellowship Committee concluded that the shortcomings were problematical, but not enough to delay her progress. The minister then went into search, and her congregation's leadership wrote and spoke of her warm-heartedness, eager welcome of feedback, and in preaching second only to Channing. Is there collusion here, both parties seeking an easy way out? When the search committee calls, what should the UUA's response be? And what should the minister know about the UUA's response?

The common issue in these four cases is the proper dissemination of information in an association of free congregations. How can information be communicated to people who can use it? Where is the line between using information to counsel and using it to cripple? Should information be withheld from a committee with a "need to know" out of compassion for the minister or because a person in authority "knows better"? Should presumed attempts at concealment be challenged?

In the case of the search committee unable to get persuasive information into the hands of prospective ministers, the problem is now easily solved, thanks to new communications technology.

In the case of the minister counseled by the UUA not to take the challenging church, a less self-confident minister might well have withdrawn, and a less determined search committee backed off, in the face of consistent, presumably well-informed, authoritative skepticism. It takes courage to say "we know we're right" when the "expert" says you probably aren't. Yet it can be argued that the UUA was right on target, probing the soft spots, testing the depth of commitment. The fact is that the UUA put the minister's name on the search committee's list in the first place. But what if the UUA's skepticism about the match had run so deep that it withheld the minister's name? This, too, has become a soluble problem.

In the third case, is there any question that a search committee that asks a direct question—"is there any evidence of sexual misconduct by this minister?"—deserves a direct answer? What about the committee that fails to ask such a question: should the committee be allowed to identify its candidate publicly, and the congregation perhaps to call its next minister, only to receive through back channels disturbing information the UUA could have provided earlier? And should the UUA then conclude that past sexual misconduct, though it may not disqualify a minister for ministry in theory, in practice disqualifies the minister from being listed? I am sure this problem is not soluble to everyone's satisfaction. But there must be a consistent practice, widely understood, that allows enlightened and temperate decisions to be made in a context of trust by search committees and congregations.

And in the case of the glowing but possibly deceptive recommendations, what is the UUA's responsibility to search committees who may not receive candid reports from references? Here as in the item preceding, I would argue, the UUA is obliged to interpret and convey the

information in its possession, always with the understanding that the authoritative interpreter of the information is the search committee initially and the congregation finally, *and always with the minister's awareness*. Ideally but also in practice, the UUA must inform search committees of its understanding of materials in its possession bearing on a minister, but only after informing to the minister exactly what it will convey to search committees and affording the minister the opportunity to correct the information and to include accompanying commentary.

The degree to which the changes in procedure with respect to the last two cases represent an increase in sharing with search committees of information about ministers is not great. There may be a somewhat greater increase in the UUA's candor *with ministers* about what is being shared. The change to note is an increase in openness in every aspect of the search and settlement process: openness by search committees about the congregations they represent, openness by ministers in search about themselves as persons and as ministers, and openness by the Transitions Office to ministers of information it is conveying to congregations. This greater openness is itself one element among many in the Unitarian Universalist Association's efforts to minimize triangulation and to enhance healthier, more direct interactions—"right relations"—in the complex system of systems which is an association of free congregations.

iii.

Why have these changes happened now, rather than ten or twenty or thirty years ago? The reason, I think, is that only those intended changes occur that can first be imagined. In our time, new communications technologies enable new imaginings, and new imaginings enable new intentions. For decades, East European communism placed severe restrictions on the individual and collective imagination of its peoples. Only one image of political economy was permitted. But once the fax machine and other earlier communications technologies enabled new imaginings to circulate among an image-starved population, it became clear to them that their national economies had been walking corpses for years. The fall came with unpredicted swiftness. The more recent East Asian economic crisis is another, related case. Governments and government-connected banks in the region had long cornered the market in information, shrouding their operations in secrecy. The global capital markets made possible by new, web-based communications media, however, require transparency as a condition of doing business. Once the veil was rent, and hitherto corrupt arrangements were exposed to the light of day, the old system went weak in the knees. In both instances, the functioning of political and economic systems was dependent on the choke-hold on information maintained by a well-placed few. Such systems could not survive the greater disclosure the new technologies permitted.

The most sweeping instance of a power structure's implosion due to the wider dissemination of information is the Protestant Reformation. The advent of the printing press and the rise of literacy gave the "end-user" direct access to the most important information then deemed to exist: the Holy Scriptures. In the process, the role of "middle-man" was, if not cut out, at least greatly weakened. Once a monopolist in the dispensation of salvation, the religious leader was relegated to the status of interpreter—of text, creed, and conduct. He, and eventually she, began their long journey toward the modern liberal ministry at its most effective--a combination of counselor, sage, motivator, and leader--and also at its most inconsequential: the spiritual equivalent of a "personal shopper."

If commercial banks and entire national governments are not immune from the contemporary information revolution, if Protestant Christianity itself is a result of an earlier version, how can the Unitarian Universalist Association's search and settlement procedures not

be deeply affected? The important question, of course, is not, how can the Transitions Office maintain its existence? The question is: in the light of both age-old and new factors, how can the Transitions Office best serve both congregations and ministers and, through them, the future of liberal religion itself?

iv.

Let me describe the changes that have occurred. Perhaps the most important change, the adoption of the Congregational Record, could only be introduced once electronic communications had advanced to the point that virtually every search committee and the vast majority of ministers have easy access to the UUA website. Once this relatively straightforward, primarily technological improvement in the dissemination of information was accomplished, other changes--changes in patterns of communication, in frequency and fullness of communication, and finally in the locus of power--fell quite naturally into place. The presumption shifted: it is not what ought to be communicated, but what ought *not* be, that is the ever more pressing question. The quite legitimate pressure on the Transitions Office is what in banking circles is called "disintermediation," which means, more or less, "get out of the middle." The Transitions Office has become less a valve than a fairly complex network of tubes. Settlement work is what it has always been, a "ministry of information," but in this field, as in many others, as the volume of information and the velocity of its flow increase, the control exercised by the Transitions Office must decrease.

Change no. 1: informing ministers about congregations in search. Heretofore, ministers could only obtain much of the most meaningful information by the most unofficial, indirect, even privileged of routes. Ministers "in the know" knew a lot. New ministers, and ministers less adept at tapping into the ministerial "grape vine," knew far less. Furthermore, congregational search committees were not always candid about the conditions their next minister might face. But new technologies enable a wider dissemination of information. The Transitions Office is now asking each ministerial search committee to post a Congregational Record (CR) on a section of the website accessible to all ministers in fellowship, students in candidate status, and UUA and District staff only. The CR is designed to elicit much of the information ministers in search want to know. It will also provide search committees with a marketing tool by which they can reach the vast majority of ministers potentially interested. The wide accessibility of the CR should encourage search committee candor.

Change no. 2: informing search committees about interested ministers. There are really two changes here. The milder change is that ministers are now asked to provide enriched information about themselves on their Ministerial Records (MR; these were previously termed "Ministerial Record Sheets"—but "sheets" are history!). The goal here is to give search committees a livelier sense of potential ministerial candidates as persons and ministers, rather than as the sum total of schools attended, community and denominational work accomplished, and congregations served. The stronger change is that at the time of receiving its initial list of ministers to consider, a search committee is now given the Ministerial Record of every minister who indicates interest in considering and being considered for the position it offers.

Here's the way the information now flows. A minister, having surveyed the CRs of congregations in search, identifies to the Transitions Office, with the click of a mouse, those congregations the minister finds of interest (maximum of fifteen such indications in any year to start). When in the judgment of the Ministerial Settlement Representative the search committee is prepared to receive a list, the MSR informs the Transitions Office. The Transitions Office will

make available to the committee on its section of the online settlement system the MR of every minister who has indicated interest.

Change no. 3: empowering search committees and ministers. Under the search and settlement process as it previously operated, a minister could only gain a place on a search committee's list by action of the Transitions Director,² and a search committee could only receive names as the Transitions Director recommended them.³ In this respect the system was exclusivist, even Johannine: "No one comes to the Father except through me" (14:6). It will be no surprise that the result of such an arrangement was occasionally intense resentment and often unhealthy triangulation. Ministers could become convinced that the Transitions Director had it in for them; search committees could become persuaded that they were only being sent the dregs. By contrast, the settlement system has become resolutely pluralist, with as many centers of power and value as there are ministers and congregations in search. Any minister may assure that his or her MR goes to any congregation; all search committees will receive the MRs of all interested ministers.

Change no. 4: placing the responsibility where it belongs--on search committees and ministers. With power comes responsibility. Those ministers who may have depended on the Transitions Director to send their name to "just the right" congregation must now make their own selections on the basis of CRs. In fact, questions on the previous minister's application to enter the search process about the hoped-for financial package and geographical region no longer appear. Ministers take those factors into account on a case-by-case basis in deciding on the rings into which they will throw their hats. Ministerial requests to the Transitions Director to be listed for this or that congregation (the "Book of Hope") are likewise be a thing of the past: the choices are the ministers', not the Transitions Director's.

Similarly, search committees are now responsible for making their case directly to ministers through the CR, rather than indirectly through the Transitions Director. Too often, the ministerial profile drawn by a search committee is a compound of unrealistic fantasy and consumerist hunger, and the congregational profile a camouflaging of congregational problems. Unwillingness to engage in considered thought about the congregation's identity and its needs will very likely be met by a deserved lack of ministerial interest. Insistence on receiving a list even when the compensation offered is below ministers' expressed needs will gain no better a reception. The number of names a committee receives is no longer up to the Transitions Director.

Too, search committees of congregations of all sizes are also free to seek to recruit ministers directly, as committees of large congregations have often previously done.

Change no. 5: informing search committees about pre-candidates. One of the functions of the UUA is to credential ministers. Membership in the Unitarian Universalist Ministerial Fellowship is in one sense an historical event, and in another sense a current privilege. A minister whose conduct fails to achieve the standards required by the Fellowship may have the privilege suspended or removed by the Ministerial Fellowship Committee. At the MFC's direction, the Ministry and Professional Leadership Staff Group maintains exhaustive if not comprehensive records on ministers in Ministerial Fellowship to enable the Committee and the

² There was one exception. A minister could insist, in which case the Settlement Director was bound to include the name with the notation At Minister's Request, together with the reason the minister was not recommended.

³ Here, too, one exception. A search committee could request that the Settlement Director seek to recruit particular ministers. See "change no. 4" below.

Association to perform the credentialing function. "Ministers' files" are thus files about ministers, not files belonging to ministers, and are held in trust for the benefit of the Association's member congregations.

In the settlement process there are abundant opportunities to shade the truth. Opportunities available to search committees are now minimized by the accessibility of CRs. Opportunities open to ministers are now minimized by new Transitions Office practice: within two weeks of being notified of a search committee's pre-candidates, the Transitions Director will forward to the committee a brief interpretation of the contents of the minister's file. The statement will already have been viewed and perhaps corrected by the minister, who will have the opportunity to include comment, if desired. The point of this practice is to keep no secrets from those entitled to the information. Secrets--gossip, words about a person not said to the person--are the bane of our Association. Ridding our common life of secrets and the triangulation that permits them and flourishes on them, and entering instead on the path of openness, of right relations, is a task for all our congregations, our ministers, the UUA—and for the Transitions Office.

The most uncomfortable situations for all involved are those involving suggestions or documented cases of ministerial sexual misconduct and other impropriety--financial, legal, moral. A search committee may well conclude that even though a minister may have been blameworthy in the past, the minister has done the hard work of recovery and is, perhaps even in part because of this history, especially well-suited to serve the congregation. In that event, the Transitions Office will recommend that the committee share its knowledge with the governing board of the congregation, and that the committee and board consider making the information a part of the discussion during candidating week and in the congregation-minister covenant. In settlement as in all other dimensions of congregational life, one may hope for an environment in which misbehavior is named, consequences exacted, rehabilitation encouraged, and recovery respected, and in which covenants are authentic compounds of realism, respect, and redemption.

v.

Those are the changes. You will be glad to know that not everything is changing. The Transitions Office has earned a reputation for encouraging fairness, avoiding corruption, and advocating for ministers who may not fit the expected or, to some, the comfortable ministerial mode. It has been scrupulous, as well, in distinguishing between its counsel and its power, although that scrupulosity has not always been recognized. These commitments will not change. Speaking personally, I can hope to rival but never to exceed the dedication of David Pohl, Charles Gaines, and Daniel Hotchkiss to these essential values. My further hope and expectation is that as this "ministry of information" takes advantage of the changes just described, the Transitions Director may be able to devote less time to operational transactions and more time to the functions of guide, counselor, and coach.

The mutual election, the mutual choice, by congregation and ordained minister of one another is a complex one, both romantic and grave. If it is to have a reasonable prospect of enduring, the conditions under which the elections occurs and the process by which it is made must permit the future the congregation and minister may share to be as accurately imagined as possible. No one wants candidating week surprises. Still less welcome are surprises in the first few years of a ministry, as the pretenses drop away in the stress of common life. But of course hidden truths will out: truths concealed intentionally, and truths no one thought to bring to light.

A prime function of the search and settlement process, as a committee and a potential candidate explore and then confirm their mutual interest in a life in common, is self-disclosure: *this is who I am, or we are, and how I am, or we are.* In this process as in courtship, not all disclosures should be made at once, much less in the first moment. They can only be made in a context of deepening acquaintance and growing trust. But they must be made. The Transitions Office can assist ministers and search committees by creating conditions under which acquaintance may deepen and trust may grow, and by advising on the process as questions are raised and obstacles encountered. Its presumption will always be that concealment—whether intentional, or thoughtless, or unconscious—will do harm, and that the truth that comes with openness and self-disclosure will set us free.

Ministerial Settlement Representative Consultations

The First Consultation

Objective of this consultation: to get the congregation and its leadership off on the right foot as they begin their search by describing to as much of the congregation as possible the theory and process of the UUA's ministerial settlement process, and by describing to the board its responsibilities during the search

Send ahead: MSR I, for completion by the chair of the governing board of the sections noted

Documents the chair of the governing board should have already reviewed—available at

<http://www.uua.org/transitions> except as otherwise indicated:

- *The Settlement Handbook for Ministers and Congregations*
- *Resource Guide for Search Committees*
- *Joint Recommendations Concerning Letters of Agreement between Ministers and Congregations*
- *Succession Following Meritorious Ministry*
- “Beyond Categorical Thinking” information and visit request form—available at <http://www.uua.org/leaders/leaderslibrary/beyondcategorical/index.shtml>
- *Guidelines for the Unitarian Universalist Ministry and Code of Professional Practice* published by the Unitarian Universalist Ministers Association (UUMA)—available at <http://www.uuma.org/main/docindex.htm>.

Documents to be completed (electronically if at all possible) in connection with this consultation:

- MSR I form
- Travel & expense form
- Honorarium request

Before you arrive:

- review the report of the Transition Interview conducted by the District Executive or his/her designee
- review *When a Minister Leaves*
- review the *Settlement Handbook*

Take with: enough copies for all members of the board of the documents that follow . . .

- “Board Responsibilities in the Ministerial Transition Process”
- “Application for Membership on the Ministerial Search Committee”
- “Search Committee Budget”
- “Ministerial Compensation”
- “The Negotiating Team”
- “Guidelines for Nominating Committees”

Talking Points with the Congregation:

Introduction:

1. What is a Ministerial Settlement Representative?

- I am nominated by your District and the UUMA Chapter together and appointed by the UUA Transitions Director to assist congregations in their process of locating and securing a minister.
- My services are provided to member congregations by our Association. I receive an honorarium for the work I do, and my travel expenses are reimbursed. There is, however, no cost to you beyond your contribution to the UUA Annual Program Fund.
- I will meet with you three times, at least this once and very likely a second time in person, and a third time probably by phone. The second time will be with the search committee after it has been elected, and the third when it receives names of prospective ministers.
- My role is to coach, guide, and consult; I participate in the annual training conducted by the Transitions Office for me and my counterparts in other Districts.
- I am always available to the board president and the search committee by e-mail and phone when necessary

2. Why am I a Ministerial Settlement Representative?

- I am proud of being a member of a UU congregation and a part of our Association
- I enjoy working with UUs
- I believe in the importance of a good church/minister match to the health of our cause
- I enjoy being of assistance

3. The *Settlement Handbook* and Not Reinventing the Wheel

- You are autonomous: you can call any person you wish as your minister
- The Transitions Office does its best to assure that you are getting the minister you think you are getting; it cannot assist you in vetting ministers not in UU Ministerial Fellowship
- But this outlined procedure is the product of many years experience of many churches, and many ministers
- The bible of the search process is the *Settlement Handbook for Ministers and Congregations*, available on line for all to see
- Ministers in fellowship pledge to abide by this process
- It is a good process. Its serves both ministers and congregations by providing information, counsel, structure, and resources. Its purpose is to bring about the best possible match between minister and congregation. One of the two major goals is to provide committees and ministers alike with the greatest possible flexibility and range of choice, and with access to as much useful information as possible
- The second goal is to encourage procedures that are fair, thorough, nondiscriminatory, and efficient
- You could spend less time, less effort, less money . . . and perhaps make a big mistake!
- Follow this . . . and you could still make a mistake!
- But . . . follow this process with honesty, insight, care and you will most likely find a

good match of church and minister

First Step: I want you all to know the basics of what is to happen and so I will outline the whole procedure for you. Ours is a democratic faith (without bishops and superintendents) and the entire congregation will be much involved in selecting a new minister.

Second Step: The congregation holds one or more meetings to approve the financing of the search process, to approve compensation for the new minister, and to select a Search Committee

1. Search process: Those of you who have been involved in searches in your profession or business know that they are not cheap. This one will probably cost you at least \$8,000-\$10,000—postage, telephone, costly materials, lots of travel by both the search committee and potential candidates
 - The expenses of moving your new minister or ministry team here from wherever she or he or they may now be are on top of that
 - You can probably spread it over two budget years
2. Compensation: The Board bears the responsibility for recommending compensation for your next minister. The District Compensation Consultant can assist the Board in thinking through its compensation plan for your entire church staff.
3. Search Committee: this is one of those times when the results of a committee's work are a direct outcome of the quality of the people you put on it
 - This is not the time to make a disaffected member feel better by putting him or her on the committee. They should not be chosen to advocate for RE or music or social action or adult programs or monetary concerns—not people with an axe to grind. Use all your wisdom to elect five to seven people who love and care for the congregation as a whole
 - Serving on a search committee is a rewarding task, but it requires a lot of time and effort. Anyone you elect should resign from everything else except the choir and frequent Sunday morning attendance
 - Fairness plus Loyalty plus the Time to give—these will serve you well
 - We recommend that the Nominating Committee or the Board request nominations and self-nominations, and that it interview these people and present a slate to the congregation in open meeting. Here as in so many other areas the *Settlement Handbook* gives valuable advice

Third Step: The Search Committee works hard to get to know each other and to get to know you—your preferences and hopes and dreams for the future of the congregation and your next minister

- They will go on retreat. Think about it: the responsibility they take on a responsibility nothing less than awesome. If they are going to perform their task—the recommendation and presentation to you of the best minister for the congregation's future—successfully, they must strive to become a seven-person reproduction-in-miniature of the entire congregation. To begin this process, a one- or two-day retreat away from home and church is not merely desirable: it is necessary. They must become deeply acquainted, and they must be able to talk candidly with each other about attitudes, values, and biases. If they are going to be able, as they must, to

dispute with each other without breaking covenant with each other, it is crucial that they get to the feeling level during the retreat. Therefore we recommend that an honorarium for an experienced facilitator be included in the search committee budget. This is a good example of a small expense now paying big dividends down the road

- They will survey you, to find out who you are as a congregation. The more of you that participate, the more trustworthy the results. Who are you demographically? Who are you as a congregation? What sorts of minister will work together with you well?
- They will listen to you in cottage meetings and focus groups, to better understand the soul and spirit of this congregation, and to begin to envision with you how your potential is affected by the next minister you call
- I encourage you not to limit your thinking beforehand about this; the person ideal to work with you may be of color, a member of a historically marginalized group, handicapped, older than you anticipate, or younger, or male, or female, or gay, or lesbian, or transgender. Like the rest of Unitarian Universalists, UU ministers come in a wide-array of styles and identities. Our practice of affirming the dignity and worth to be accorded all persons has real consequences!

Fourth Step: The Search Committee in effect publishes an open offer, describing the congregation, its setting, history, and current circumstances, the hopes you have for the future, and the desires and expectations you have for the skills, interests, and character of your next minister

- They publish a short form what they have learned in the form of a Congregational Record. This goes on the Transitions Office's webpage, to be read by every minister who has even a passing interest in serving with your congregation
- They prepare a much-enriched, fully detailed compendium of information in the form of a “packet,” to be exchanged with ministers with whom they decide to enter into mutual consideration

Fifth Step: Usually a few weeks after the Congregational Record goes up on the Settlement System site, the Search Committee gains access on line to the Ministerial Records of ministers who have indicated some interest in mutual exploration with this congregation

- I work with the Search Committee on its plans for contacting, sifting and winnowing, interviewing, and making decisions
- The Transitions Office pledges to make available the Ministerial Record of every interested minister who is in good standing with the UUA. There is no editing here
- The Committee exchanges its longer packet with those ministers in whom it is interested in return. They, too, have assembled packets, full of things like sermons, newsletter articles, references, and so on
- The selection process is extensive, and intensive, and it is also, of course, two-way. Like your Search Committee, the ministers, too, are making judgments.
- In any year there are likely to be fifty to seventy congregations in search, and two or three times that many ministers who are at least interested in exploring a new position, everyone from the newest theological school graduate to a minister who has

- been serving for twenty or thirty years
- The Search Committee is welcome to seek out other ministers that it feels may serve you well, and to try to recruit them
- The Transitions Director, too, puts a lot of effort into encouraging certain ministers to consider certain congregations

Sixth Step: The Search Committee spends a weekend apiece with the top three or four ministers under consideration

- Not here! And not you! Can you imagine how divisive it would be for different groups in the congregation to take sides! Don't split the church! Trust your committee to do this painful selection themselves.
- While the Search Committee will keep you informed of what is going on, they will keep the identities of their prospects entirely confidential to avoid this sort of inner turmoil

Seventh Step: The Search Committee asks the minister who will in their judgment serve the congregation best, now and for the foreseeable future, to be their candidate. If that minister does not agree, they may or may not be comfortable asking another one of their pre-candidates. The candidate is brought here for an intensive nine days of getting acquainted: Candidating Week. You will vote on whether to accept this candidate at the end of the week. The Transitions Office advises ministers not to accept a call of less than 90 percent. Most ministers hope for a vote of at least 95 percent

Things to Note:

- Time: this will not be fast. Note all the work of the SC above, then note that your candidate will likely go back to resign, giving three months notice
- MSRs don't: become a candidate, offer opinions on candidates, read Ministerial Records, recommend candidates
- MSRs do: help you use this selection procedure
- Secrecy: the Search Committee isn't trying to be sly; it is committed to confidentiality, to protect employed ministers, to prevent upsets within this congregation, to not disturb other congregations. Select the Search Committee, then trust them to be representative
- Honesty and realistic expectations:
 - This is a time to explore carefully who you are, what you need, what directions you wish to go, what your limitations and faults are--and to present yourselves thus to prospective ministers
 - Be assured there is no superperson out there who will give you the sermons, counseling, bedside care, social action leadership, and presence in the community each and everyone wants. Consider how much experience and what skills you want and can afford
 - Look for someone you can work with whom you can grow. Expect not so much great leadership as cooperative potential.
- Institutional wisdom: The *Settlement Handbook* may be the bible of the search process, but we are religious liberals, not fundamentalists. The Transitions Administrator and

Transitions Director are always available to the Search Committee to discuss special circumstances and sensitive or perplexing issues.

Talking Points with the Board:

- Repeat requirements of work load and representative character needed in Search Committee candidates
- Bring up the fact that, like the Nominating Committee (probably), the Search Committee is a committee of the congregation, not a committee of the Board. There are thus abundant gray areas in the relations of the Committee with the Board. Both bodies can serve the congregation best by keeping each other up to speed and airing concerns early
- It's time to look at the by-laws, to make sure there is nothing to run afoul of in the way of ministerial termination, call, and the Committee on Ministry
 - With ministers coached to expect a vote of at least 90 percent, shouldn't the congregation put itself beyond the harm of a desperate minister?
 - Shouldn't bylaws acknowledge, too, that a minister can't last with 30 percent of the congregation or more against?
 - Bylaws that mandate a Ministerial Relations Committee assume congregation-minister conflict, and may help to create it
- Budget: walk them through expenses to be incurred: they mustn't think cheap
 - Communications: phone, stationery, stamps, secretary
 - Church Packet and its mailing
 - Pre-candidating expenses (travel, meals, and lodging for three ministers)
 - Committee expenses at pre-candidating (travel, meals)
 - Candidating week expenses (travel for candidate and family, lodging, all meals, entertainment, special printing materials)
 - Settlement expenses (moving; assistance in housing; welcoming entertainment)
 - Start-up
- Be prepared to talk with minister about contract in UUA language: "agreement" or "covenant"
 - There must be prior agreement on who talks with minister about finances and negotiates contract: recommend negotiating team made up of board member, Search Committee member, wise and trusted "elder"
 - Point out *Joint Recommendations on Letters of Agreement between Ministers and Congregations* on the Transitions webpage; remind the President of the documents already reviewed
 - Encourage the Board to expect good assistance from the Compensation Consultant
 - Note: you probably aren't rewarding your minister as highly as some figures suggest
- Time Line and Realism: work backwards--for a September placement
 - April-May—candidating week
 - March 15 ate the earliest-April—candidate choice
 - February- March—pre-candidating weekends
 - November-January—packet exchanges

November-December—complete packet, receive list

September-October—self-study

March-June—direction-finding

- Execution can drag; the example given is without hitches: it is common to go longer than a year
- Refer to the publication, *Succession after Meritorious Ministry*: let them know that if they want to honor their outgoing minister for a lengthy (generally ten years or more) and successful ministry, the time to do it is during the good-bye process, but that the definition of the relationship between the outgoing minister and the congregation must be most carefully considered
- Leave Board President with copy of MSR II to know budget expectations for next visit
- Make sure MSR I items are all filled in

Board Responsibilities in the Ministerial Transition Process

The Board of Trustees has a critical role in the ministerial transition process. Its principal tasks are related to finances and the ministry agreement that will be established between the congregation and its new minister. If the ministry now coming to an end has been a successful one, there is sensitive work to do in preparing for such continuing relationship as may occur. Information on the following areas follows:

- Preview of the Search Year
- Search Committee Budget
- Minister’s Compensation
- Negotiating Team
- Refer to *Succession after Meritorious Ministry*

Preview of the Search Year

- a) Things that need to be completed soon:
 - Receive visit from Compensation Consultant
 - Fill out checked items on “MSR Report Form I” and return to me.
2. Choose a Search Committee of seven members.
3. Work out a draft Letter of Agreement or contract. This can best be undertaken by appointing a Negotiating Team that is able to prepare such a draft agreement and be ready to negotiate its terms with the search committee’s candidate.
4. After the list of possible candidates is delivered, consider aiding the Search Committee in identifying assistants, coordinators, and hosts for various activities during Candidating Week. At the end of the Candidating Week, a congregational meeting to consider calling the minister is the culminating event with a 90% to 95% vote minimum usually expected.
5. Often a Search Committee member or two becomes a member of the Committee on Ministry if both they and the minister agree.
6. The Installation of your new Minister should be put into your society's schedule for the following year and a budget of between \$500 to \$3,000 included.
7. The Search Committee will keep you and the congregation posted on their progress, but when they start dealing with the names of ministers they must maintain strict confidentiality. This protects the ministers from having the news reach their present churches, and it protects your society from the nightmare of different factions advocating different candidates.

***Application For Membership
on the Ministerial Search Committee***

Name _____

Address _____

Phone work _____ home _____ Cell _____

E-Mail _____ fax _____

Years in this Church _____ Years a Unitarian Universalist _____

Committees Served _____ (place photo here)

I believe the purpose of our church is:

**The characteristics most important in the minister who will serve this congregation are:
(number 1-5)**

- | | |
|---|---|
| <input type="checkbox"/> Age | <input type="checkbox"/> Sexual orientation |
| <input type="checkbox"/> Marital status | <input type="checkbox"/> Gender |
| <input type="checkbox"/> Attitude toward diversity in church membership | <input type="checkbox"/> Sexual identity |
| <input type="checkbox"/> Previous experience | <input type="checkbox"/> Leadership style |
| <input type="checkbox"/> Denominational involvement | <input type="checkbox"/> Theology |
| <input type="checkbox"/> Ethnicity | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Race | <input type="checkbox"/> Other _____ |

**The areas of expertise most important in the minister who will serve this congregation are:
(number 1-5)**

- | | |
|--|--|
| <input type="checkbox"/> Administration | <input type="checkbox"/> Pastoral care |
| <input type="checkbox"/> Community outreach | <input type="checkbox"/> Preaching and worship |
| <input type="checkbox"/> Counseling | <input type="checkbox"/> Religious education |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Social justice |
| <input type="checkbox"/> Knowledge of Unitarian Universalism | <input type="checkbox"/> Fund-raising |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |

If I am elected to serve on the Ministerial Search Committee, the special gifts, skills, interests I bring are:

I am prepared to make the significant commitment of time and energy that I know this responsibility will require

Signed _____

**Deadline for applications -
All applications will be posted in the church**

***Search Committee Budget
For the Board and Search Committee***

The general rule of thumb on the amount needed to carry out a successful search is \$8,000 or 18 to 20% of the projected S&H (Salary & Housing), whichever is greater. The budget is best worked out between the Board and the Search Committee. The categories below indicate the major search expenses, though the specific costs will of course vary from society to society.

Search Committee Retreat (including site and facilitator)	\$ 500
Church packet—printing and other costs	750
Postage, telephone, miscellaneous	400
Committee members' expenses—mileage to pre-candidating sites, meals and lodging as required	1,000
Pre-candidating visits—travel, housing, meals for candidate and committee	3,500
Candidating week—nine days, candidate and family	<u>1,500</u>
	\$7,650

Be sure to determine which budget year(s) the expenses fall in. Once the minister arrives, the following expenses will also soon come due:

Moving expenses	\$5,000 to \$20,000
Installation of your minister	500 to 3,000
Start-up Seminar in Boston for your minister if his/her first settlement (on top of package)	up to 400

Ministerial Compensation
For the Board, Search Committee, and Negotiating Team

Before a church can be officially listed as looking for a minister, an "Application for Minister" form must be submitted on line to the Transitions Office. The key item on this form is the Salary & Housing your congregation is offering. The S&H determines the alphabetic "Salary Code" by which your congregation is designated, and thus indirectly the number of ministers interested in being considered for your position.

The compensation you offer your next minister is one of the most important elements in attracting candidates. These guidelines may help you arrive at the amount:

- It should be adequate, as reflected by its position on the UUA Guidelines for Basic Compensation Ranges for Professional Staff Positions most recently approved by the UUA Board of Trustees.
- It should likely be higher than you first think. Most congregations (like many businesses) fail to keep up with current standards over the years.
- It should be reasonable relative to comparable positions in your community: other ministers and rabbis in congregations of similar size, teachers and school administrators, college professors, and so on.
- It should be competitive with salary packages offered by other similar UU congregations looking for a minister next year.
- It should be generous, above the median of your congregation members' own economic position, reflective of the perception and respect you wish your minister to be accorded in the community.

The Negotiating Team
For the Board, Search Committee, and Negotiating Team

A team to work out and negotiate the agreement on expectations and compensation with your new minister should be established shortly after the Search Committee and the Ministerial Settlement Representative have met for the first time.

Membership: The three member team should include: a Board Member, a Search Committee Member, and a Senior Statesperson from the congregation. At least one member should understand financial matters.

Schedule:

The team should begin meeting as soon as it is constituted. The draft agreement must be sent to the Transitions Director (along with other information from the Search Committee) before a list of prospective candidates can be provided. It should also be included in the packet that is sent to prospective ministers.

It is important to have the provisions below clearly decided upon before beginning serious dialogue with potential candidates. Ministers need to gain a clear understanding of your expectations and your offer. They are impressed with Search Committees that have things in place and know what they are talking about. Prospective candidates and the Search Committee should reach a clarity approaching agreement in principle during the pre-candidating weekend. The agreement should be fully worked out in writing and signed by both parties (such to a vote to call by the congregation and decision to accept by the candidate) before you release the name of your candidate to the congregation. Candidating week is no time for negotiation!

The *Settlement Handbook* contains all necessary information, including links to crucial pages maintained by the Office of Church Staff Finance.

Getting Started: the following items should be helpful:

1. “Application for Minister” (available at the Search Committee’s web page in the Ministerial Settlement System at <http://www2.uua.org/ministerapp.asp>)
2. Your congregation’s current agreement or contract
3. Model ministry agreements and related resources in *Joint Recommendations Concerning Letters of Agreement between Ministers and Congregations* (available at the Transitions Office website at <http://www.uua.org/transitions>)
4. Materials to be brought by the Compensation Consultant from the UUA Office of Church Staff Finances, available at <http://www.uua.org/leaders/leaderslibrary/compensation>. Contact the Administrator at 617) 948-6421
5. *Church and Clergy Tax Guide* by Richard Hammar. Call 1-800-222-1840 or go online to purchase.

What Should the Agreement Include?

Review Joint Recommendations

Whatever form your agreement takes, there are three basic groups of elements that will be included: 1) Salary plus Housing Allowance, 2) benefits and professional expenses, and 3) expectations of each party.

Salary plus Housing Allowance and Benefits, and Expenses

The Board will determine Salary & Housing (S&H). To provide benefits and expenses at the Transitions Office-recommended level, figure another 35-40 percent. To be included in the latter group:

1. Health insurance—the UUA recommendation is that the congregation cover 80% of the minister's premium. It also recommends that the congregation cover 50% of the premium for dependent children and spouse and partner. What will be done in this congregation?
2. Life insurance—the UUA recommendation is that the church insist that the congregation “make available” life insurance at two times S&H for the benefit of dependents and the relief of the congregation in the event of the minister’s death. Should the church pay for it?
3. Disability income insurance—the UUA recommendation is that the church “make available” disability income insurance at 60% of S&H with a 90-day waiting period, How else will the church avoid being put in a moral bind in the event of the minister’s disability? How else can a disability provision in the agreement be crafted. Should the church pay for it?
4. Pension contribution: at least 10% of S&H unless you want your minister to work forever.
5. Social security: Your minister pays Social Security at the self-employed level of 15.3 percent. The UUA recommends that the church pay monthly to the minister a 7.65 percent (taxable) “contribution in lieu of FICA,” thus putting the minister’s compensation pretty much on the same footing as everyone else.
6. Professional expenses allowance: the Transitions Office recommends 10 percent of S&H.

One of the decisions needed: if the candidate can establish no need for certain coverages that the church is willing to fund, should they be added to salary?

Expectations

Both the congregation and your ministerial candidate are likely to have thoughts on the topics listed below. It is helpful if both know their thinking on each, particularly when the positions are strongly held. Nothing crystallizes thinking like drafting an agreement. Generally, the more flexible you are, the better. It is not healthy to expect your new minister to conform to your last minister's style or to suppress the gifts s/he can bring to you. Discussing expectations is a fine way for a minister and search committee to learn more about each other and move the relationship along. All of the following should be negotiable:

Sundays: how many and how specified (e.g., 30 out of 40)? What does “Sunday off” mean? Are professional or denominational meetings on duty or off?

Office hours: what expectations and how rigid?

Day off: what expectations are most reasonable?

Minister’s relationship to other staff: what makes the most sense? A clear delineation of who’s responsible for what saves a peck of trouble. The other view: let the parties work it out among themselves.

Minister’s relationship with children and youth: there is no right answer here, or in any of these areas, but what do the parties expect?

Evaluations: how often, and conducted by whom? (See the helpful publication, *Assessing Our Leadership*, <http://www.uua.org/documents/mpl/assessingleadership.pdf>

Vacation, study leave, and continuing education: how much of each? Who pays when minister is called back from any of these?

Sabbatical leave: what are the conditions?

Sick leave: what is a reasonable understanding on this?

Starting date: reach a decision about this. If the church is on a “church year,” the UUA recommends August 15.

Moving expenses: what will be covered and what is the amount available?

Housing: if you have a parsonage, what are the provisions for privacy, utilities, repairs and maintenance? If you do not, will you subsidize the cost of additional trips for house hunting?

Termination provisions: what are the by-law provisions, including termination pay?

The above topics are not exhaustive. There is obviously enough suggested that it behooves the Negotiating Team, in consultation with the Board of Trustees and the Search Committee, to begin working through the various elements as soon as it can.

A Final Word

It is not necessary—in fact it is likely counterproductive--to have everything worked out in final detail. There is, of course, a commitment regarding the salary provisions, but there should be room to negotiate on most issues as you and your candidate develop together the relationship you wish to forge for your longstanding relationship.

Not feeling required to have thought of everything may remove the pressure a bit when the Search Committee member of the Negotiating Team begins discussions with prospective candidates, but it is helpful then to state that "this is an area we are still working on--do you have any thoughts?"

Following the selection of your candidate, the minister and your Negotiating Team should finalize the agreement and present it to the Board for approval before announcing the candidate's name to the congregation.

Good luck!

*Guidelines for Nominating Committees
with Regard to
Ministerial Search Committees
For the Board and Search Committee*

The kind of person to seek:

1. One who has an overall perspective and commitment to the nature, purpose and activities of the Church. Contrary to what might be expected, we do not recommend that Search Committees be made up of representatives of special interests with the Church. This tends to create unnecessary conflict and to have people looking for "one issue" candidates. So instead of looking for "representatives," we recommend looking for "senators."
2. One who is committed to UU pluralism in every area: theology, life styles, social concern, etc.
3. One who is patiently able to work for consensus rather than insisting upon majority rule or minority tyranny.
4. One with time to be thoroughly and continually involved.. Members of the Committee may well devote a minimum of 20 hours monthly for ten months or so, to say nothing of the added time involved when the pre-candidating interviews get underway. Searching for a minister must be a top priority for members of the Search Committee.
5. One without rigid requirements regarding ministerial state, sex, marital status, age, etc.
6. One who constantly remembers the wishes of the Congregation, who will not permit the Search Committee to become an autonomous, independent (and finally irresponsible) entity.
7. One with a history of UU involvement. This does not necessarily mean long-term involvement, but it does mean that people new to our religious community ought not to be asked to serve. It takes time for people really to accept and embrace our diversity.
8. One who very evidently has the confidence of the Congregation.
9. One who can respect the confidentiality of the process, but who, nonetheless, is eager to keep the Congregation informed regarding the progress that is being made.
10. One of irenic, cooperative disposition: not disputatious.

The kind of person to avoid:

(This is really the flip side of the suggestions on the other side; still, it may be important to be explicit regarding a few characteristics)

1. One with limited and high-intensity interests; one who defines the Church in narrow, exclusive terms
2. One with rigid, authoritarian ideas coupled with little respect for differences, e.g. the militant Humanist, the intolerant Christian, the rabid Peacenik, the gadfly
3. One who readily accedes to any request, but who is unable, either by temperament or time-limitations, to follow through
4. One who feels that "we know best," thus urging the Search Committee to ignore the expressed wishes of the Congregation
5. One who has a genius for stroking the cat from tail to head just to see the sparks fly
6. One who is actively disliked by many people in the Congregation. Gadflies have their places, but not on Search Committees

Ministerial Settlement Representative Consultations

The Second Consultation

Objective of this consultation: to review the ministerial search process with the Search Committee in such detail that questions are stimulated and new understanding provoked. Now is the best time for any Search Committee members who feels in over their head to withdraw.

Documents to be completed, electronically if possible, in connection with this consultation:

- MSR II form
- Travel & expense form
- Honorarium request

Before you arrive:

- Get “recent settlement statistics” from the Transitions Office (see “The Current Placement Scene” below)
- Ask that a search committee member make a copy of the *Settlement Handbook* for every member

Take with:

- Two or three congregational packets to show the committee. If you don’t have any, your MSR predecessor or the District may. As a last resort, churches in your District that were recently in search certainly will.
- Seven copies of the two handouts that follow this section of the *MSR Guide*
 - “Goals of a Search Committee Retreat”
 - “Getting Started”
- perhaps a few copies of the “Ministerial Search Checklist” in case the *Settlement Handbook* copies prove unavailable

A. Preliminaries: Persons, Purpose, Players, and the Process

Persons: Briefly review “Guidelines for Nominating Committees.” Then ask: “Why do you believe you were elected to this committee?” Make each person respond out of their depths. Help them hear each other.

Planning: Review “Goals of a Search Committee Retreat.” Don’t let them beg off on this crucial step.

Purpose: Verify the following: “To find the minister who will best serve your congregation as you move into the next decade.” In other words, this is not about the best minister in the abstract, but the best for your congregation, given its strengths, weaknesses, history, commitments, budget, capacity to compensate, etc.

Players: This a productive partnership involving at least nine parties who are united by the same purpose. They include:

- Ministerial Transitions Office: the office at the UUA whose purpose it is to provide

a process by which the best minister-congregation matches are arrived at. The Transitions Director seeks to perform the role of honest broker with both congregations and ministers. He has been in the position since 1998. The Transitions Administrator is completing her second year. This office has already provided a number of documents to this congregation and very likely counsel on the interim ministry process as well, and looks forward to providing abundant support. I am part of that support. The Search process for your congregation represents a \$3,000 per congregation commitment by the UUA to support your efforts.

- Ministerial Settlement Representative: I am your consultant, nominated by the District Board and Chapter, appointed by the Transitions Director, and trained by the UUA. My role is to coach and guide you toward success in your efforts. The UUA provides three consultations with me. This is the second. The third, to take place when you receive the Ministerial Records of ministers interested in serving with you, will likely be by protracted phone call. I am also available by phone or e-mail whenever needed.
- District Executive (DE): a good resource throughout the process. The DE can be especially helpful to you as you review your list of potential candidates.
- Congregation: in our Association the ultimate human power in our congregation. The congregation chooses the minister. They will be involved in making themselves, their needs, and their wishes known early in the process by means of the survey and other avenues of expression. They will be involved in the candidating week at the end. Their final, conclusive act is their vote on calling the minister.
- Board of trustees: has a critical role in the appointment of a new minister. It makes key financial decisions on the search committee budget and on ministerial compensation at the start of the process and fleshes out the compensation package and the contract with the minister well before candidating week.
- Negotiating Team: works out the Ministry Agreement and the financial package. Consists of 3 members: a search committee member, a board member₁ and a senior statesperson, with one of these individuals being adept at financial matters.
- Search committee: responsible for accomplishing the task. You will be working with the others players in this drama. Let's deal with how you might get started with your work. (Pass out the "Getting Started" sheet and go through it.)
- The District Compensation Consultant: will or already has provided the board with helpful information on planning the compensation package to be offered to your next minister.
- Interim minister: see "The Role of the Interim Minister in the Search Process" in the *Settlement Handbook*

Process - The process has evolved over the years, improved by the recommendations of the hundreds of search committees, ministers, and MSRs involved, and by Transitions Office initiatives. Historically, for 90 percent of congregations in search in any year it *works--almost like Swiss clock!*

Do you have to follow it? No. Slavish attempts to do so would be foolish. Equally foolish is inventing your own process: it will probably cost you both time and money.

B. Search Time Line (distribute “Ministerial Search Checklist” from the *Settlement Handbook* to those who don’t have the *Handbook* at hand).

C. Congregational Self-Study

Consider using online tools such as Survey Monkey for which the Transitions Office has made a template available for your use. See the *Resource Guide* Chapter 14. Other examples of summaries can be found in the sample packets from other congregational search committees. Adapting the survey to your congregation is important. The advice in the *Handbook* is solid. For any question you ask, think about how it will be tabulated and explained.

1. Set up a process of producing, distributing, and analyzing the survey. Establish a schedule with deadlines.
2. Non-committee help is fine up until the final interpretation, but this must be done by you and is absolutely critical to the process.
3. Our ministry has been expanded because we have opened up the process to every minister without regard to age, race, color, disability, sex, affectional or sexual orientation, age, or national origin. The *UUMA Guidelines* reject the legitimacy of gender identity, too, as a basis for discrimination. In your survey you need to include the bylaw expressing this and the following question:

The UUA General Assembly adopted an equal opportunity policy in 1989 which states "ministerial settlement procedures without discrimination because of race, color, disability, sex, affectional or sexual orientation, age, or national origin." Do you have any reservations regarding the application of this policy in regard to our church?

Even if your congregation has recently done intensive work with a professional facilitator around Welcoming Congregation issues, arrange for a “Beyond Categorical Thinking” team to visit the congregation. This will be provided at minimal cost by the UUA. You can understand the importance of this by considering what might happen if you learned during the candidating week that you had selected a candidate unacceptable to a hitherto quiet group within your congregation.

You and the UUA are the ones that oversee this value and commitment. It is important that you be clear about your own concerns and feelings and put them behind you. You must be what a jury should be—fair and impartial—and thus free to select the best candidate without prejudice, either negative or positive.

4. Congregations with a multicultural leaning have the opportunity to open a conversation that allows the next called minister, whether a minister of color or not, to step more readily into the multicultural realm

Caveat: Don’t plan to leave this topic to a first-year minister, esp. of minister of color! The minister, especially the new minister, cannot do the congregation’s ministry solo: this is shared ministry. The new minister’s first ministry: to come to know and love the congregation.

The search committee should be an engine of congregational conversation, not the engine pulling the multicultural train: risk of separateness from the congregation
Resources available:

- Readiness survey (integrated in search committee survey? Earlier availability for interim minister's use?)
 - Beyond Categorical Thinking (Search Committee as a whole needs to complete application)
 - JUUST Change Consultancy
 - Jubilee 1 and 2
 - “Now Is the Time” DVD/Discussion Guide
5. Cottage meetings are as important in the self-survey process as surveys. Listen your congregation into the kind of clarity you need to reflect them in the search process.
 6. Craft the history of the church—its needs, wants, weaknesses, and its relationships to its ministers—as honestly as you can.
 7. Create the profile of the minister you desire. To do so, interpret the survey results, don't simply summarize them. It is very easy to describe a minister who can leap tall buildings and walk on water. The challenge is to state what may not be of greatest importance. For assistance in accomplishing a “differential diagnosis” of the mode of minister your congregation may best benefit from, visit “Conducting an Effective Ministerial Search Survey” at <http://www.action-research.com/uua/minsurvey.html>
 8. Ministers will indicate interest in you based on everything they can learn about you, from every source, accurate and inaccurate. It is thus most important to be disclosive (but not confessional) in your CR, and to indicate your willingness to discuss absolutely everything about your congregation with ministers in whom you become interested.

D. Church Packet

1. Show samples.
2. Can range from simple to pricey, plain to artsy, black and white to use of color. Audios and videos are sometimes used, and Internet-based packets are common. What best expresses your congregation?
3. *Settlement Handbook* has clear instructions. Think about what a minister would be interested in seeing and knowing? What are your strengths and assets? What are your “growing edges,” things to work on?
4. Make it effective. Sell the church. This is your first impression. But be honest. (Press ministers to be honest too--they're good at first impressions.)
5. You can involve others from the congregation in this effort.
6. Start getting your color photos as early as possible, knowing what you want to show and having someone who knows how to take good pictures involved.
7. Work out the details of producing and sending your packet and the associated costs. Plan on producing a dozen copies at least. The exclusively online or on CD packet meets with mixed results among ministers.

E. General Advice

1. Share all information. It is important in this process for every search committee member to know fully what is going on. Set up procedures to keep the Board and congregation aware of what you are doing.
2. Keep confidential the identities of ministers you are considering at all costs. No one other than search committee members should have any idea of who is being considered as candidates—not even spouses. This is not easy. Many will be curious and there are many ways the names of prospective candidates can leak out: letters passing through the church office written to them, reimbursement checks drawn to them, newsletter announcements of their appearance at churches where they preach pre-candidating sermons, and so on. You also must be very sensitive in your interactions with your candidates and their current societies.
3. Keep the congregation well informed about where you are in your process and present a united front. Resolve your differences privately until you are all comfortable with your selection as the best possible choice for the congregation, and then be unanimous in your support of your candidate. If you cannot be, strongly consider going into a second year of search. It is done about 10% of the time.

F. The Current Placement Scene

- Recent statistics
- Willingness to go “beyond categorical thinking” widens the field
- Be realistic about talent available, what money you have, and what you will get
- Know what the Board has allotted to S&H vis-à-vis UUA recommendations
- Some search committees go back to Board and argue that for the minister wanted more money is necessary
- Rich competence is rare. In its absence, pick someone to work with, grow with
- You will receive the MRs of all ministers indicating interest. You may prospect for and seek to recruit specific ministers, if you wish. But it must all go through the Transitions Office in fairness. Talk with me if such situations come up; I'll help.
- Once your CR is ready to go “live” on the Settlement System, let me know. They like me to see it first.

Goals of a Search Committee Retreat

Every year one or two search committees crash late in the process. The result—a second year in search with a new committee. Lots of vexation and no small expense. Almost invariably, the committees that crashed and the committees on which serious conflict develops short-circuited the retreat. It is not a luxury—it is a necessity!

1. Get better acquainted—deeply acquainted. You will be going on a long, sometimes tortuous journey together.
2. Build trust. There will be issues, principles, processes, and people about which you will disagree, sometimes intensely. You need to develop the trust and mutual understanding now that will hold you together then.
3. Learn about each other's skills and interests so that you can begin blocking out and dividing up the tasks ahead.
4. Develop a timeline for your search process.
5. Develop your bases for making decisions. Consensus is to be hoped for, but a back-up procedure is wise to have in place.
 - When is total agreement necessary; when not
 - When and how to eliminate candidates
 - How to decide on pre-candidates
 - How many reserve slots to leave for late applicants
 - Rules and when to change them
 - Confidentiality details and questions
 - Communications with Board and Congregation
 - Listening to one another and how to argue
 - Roles for process observer
 - Dealing with disagreements
 - Places for unanimity
 - How to keep the church "up"
6. Plan how you will include key leaders in your congregation and continuing staff members. It is reasonable to have certain church staff provide input into the search process. Each search committee needs to decide when and how this can best be done. These are the most common ways of involving such staff as other ministers, RE Directors, and administrators:
 - Search committee interviews the staff members early in the process to gain views on the society, the new minister, their hope for salary parity and their role in the future. One search committee member may serve as liaison with each staff person.
 - Valued staff persons, ordained or not, should probably have time with each pre-candidate

during the weekend. Afterwards the liaison should meet with the staff person and gather his/her impressions to share with the full committee.

- Such staff persons should have time with the minister who is selected during candidating week.

Getting Started

You are beginning an adventure that may be among the richest, most challenging you have experienced in your congregation. Most search committees have found the following suggestions helpful to get launched:

1. Select a chair and certain other positions as described in “Roles to Fill” section of the *Settlement Handbook*.
2. Take time to do team building. Usually, a retreat of one or two days has proven the most effective way to accomplish this.
3. Each of you read the entire *Settlement Handbook for Ministers and Congregations* (including the section for the ministers!) and *Resource Guide*. You can do this on line, but even better, print both of them out and reread them, or sections of them, from time to time.
4. Establish a meeting schedule that everyone can make. Initially, most committees have found meeting once a week to be useful. (Since you will be putting in probably 10-12 hours a month on committee tasks—more in heavy periods—it is best to not be involved in other major church responsibilities.) It is vital that every committee member attend each meeting.
5. Some committees (and boards) find it worthwhile to do “centering” at the beginning of each meeting, often with an appropriate reading.
6. If the committee receives nominations of prospective candidates from within the congregation or from other sources, inquire as to nominator’s reasons. If you then wish to pursue the nominated minister, do so. Feel free, as well, to recruit on your own. Either way, be sure any agreeable minister completes his/her MR through the Settlement System and “clicks” to have it transmitted to you. This is an essential step in quality control.
7. Be in touch with the Negotiating Team and the Board to be informed of their progress on dealing with the agreement and with compensation. Include the draft agreement in the packet.
8. Keep your own fantasy lives in check. Since this is a minister you are searching for, and not a romance, don’t look for the one-and-only. Search instead for three or four terrific pre-candidates, each of whom could serve the congregation very capably, but each of whom, because a unique minister and human being, would over time develop the congregation in a unique direction. After the pre-candidating weekends you need to decide which direction will serve the ministry of the congregation best.

Ministerial Settlement Representative Consultations

The Third Consultation

Overview

This is it, the final stage, what you have been working towards. Now that you've received the Ministerial Records of ministers who have indicated interest so far, it's time to go over: follow-through, confidentiality, sifting and winnowing, pre-candidating weekends, candidating week, and post-candidating wrap-up.

A. The List

- The ministers whose MRs you have received are interested in you.
- Each of the ministers whose MR you have received knows of the fact. They will be expecting a call.
- I am not permitted to make any comments about potential candidates.
- Review appropriate sections of the *Settlement Handbook*.
- Go through the Ministerial Records over the next few days. Use a rating sheet. Reach out and focus on the positives. Remember that each minister has spent a great deal of time and effort to become a professional, so give them a fair hearing.
- The MRs can be photocopied, as long as confidentiality is safeguarded. You can share only the most general information about the list with the congregation, and keep them posted about your progress.

B. Follow-Through: immediate contact, rapid packet exchange

- Each minister has indicated interest in you. Consider each of them fully and exchange packets with each in whom you, too, are interested
- Sometimes a minister is no longer interested—has changed mind about moving, issues have come up regarding a spouse's work or other family considerations, geography, even compensation
- Find out where each minister wants to be contacted—home or office
- Packet exchanges are just that: exchanges. Don't bother sending your packet to a minister who "won't show you hers before you show her yours"
- This first phone call is your initial opportunity to present your society in a positive light *and* to pick up a feeling about how each minister presents her/himself.
- Send your packet without wasting time
- Pass the ministers' packets around, with a 24-hour per member turnaround and a traffic cop in charge. *Make no marks* on the packets.

C. Confidentiality: ask for a discussion of how the committee now understands this issue amongst themselves.

- Confidentiality protects the committee ("Why didn't you select _____ ?!")
- Confidentiality protects the ministers ("We heard you were looking! Don't you love us?!")
- Confidentiality protects the local congregation (embarrassment of being turned down by a pre-candidate, infighting about candidates, full church split)
- Confidentiality protects other churches (panic and confusion based on incomplete

information that they may lose a minister)

D. Sifting and winnowing

- References: Develop and hone your questioning of references. You can get advice from experts in your congregation. Questions such as these can be used in inquiries about previous internships and ministries:
 - What did the minister do especially well?
 - What were the most common criticisms?
 - How did the minister respond to criticism?
 - How did the ministry end?
- If you don't check references carefully, probingly, and if you don't ask for other references to speak with subject to asking a minister to be a pre-candidate, you are irresponsible to your task of finding the best available minister for your situation. This is all your judgment call: on what basis will you make your judgment?
- Be nosy. The congregation depends upon you to find things out, and to make good judgments
- Get beyond the first impression. If a minister has any skill at all, it is in making a good first impression. Get under the cover to other skills and substance!
- Divide responsibilities for questions in particular areas; also have set questions that each will be asked, in addition to spontaneous questions, so all interviews have some uniformity of process to make judgments easier
- A good place to start is with District Executives, including your own, to ask about ministers who are or have been in their district. Listen carefully for their coaching on questions to raise. Again, be nosy, probing, and assertive, and follow leads. However, under no circumstances contact a member of a minister's own congregation without his express permission.
- When convenient and with the minister's permission only, discreetly visit a Sunday service. Be aware that this puts one potential candidate in a different perspective than others you are looking at; for good or bad you now compare flesh and blood with paper people. And if the whole committee is not in attendance the burden is large upon the one or few to observe and judge for the whole committee; it may not be worth it if considered carefully together.
- Phone interviews: these can be done after packet exchange and review. Pre-scheduled conference calls are best, with two or three or even more members on the phone and the minister informed of that arrangement ahead of time. (No committee should depend on the insights of one member alone.) It is helpful to ask the same basic questions—and not too many—to all candidates. Make certain the minister can ask questions of you!
- Additional Ministerial Records: the Transitions Office will make them available as ministers indicate interest. Keep a watch on your list of interested ministers on the Transitions website.
- Eliminated candidates: as you become convinced that some prospects are not a fit, let them know immediately, thank them for their interest, and send their packets back

- immediately, in mint condition. Ask them to do the same.
- Mock interview: do one with your interim or with a neighboring minister. Be sure you have not only your questions and questioning process squared away ahead of time, but that you have anticipated questions that your “candidate” might ask and are prepared to answer them.
- Neutral pulpits: you should already have set these up, along with provisions to ensure confidentiality. Have a contingency plan ready for filling the pulpit if for some reason you are not using it for a pre-candidate.

E. Pre-Candidating Weekends

- Final check: once you have pre-candidates in mind, ask the Transitions Office for interpretive file summaries. Allow two weeks. Be aware that although there is a lot the UUA does not know, the Transitions Director sees himself as bearing a fiduciary obligation to search committees about what it does know
- For your pre-candidates, and only with the minister’s permission, speak with three *named* references (references whose names the minister has given you in confidence) in the minister’s current ministry setting and with both named and *developed* references (persons whom you identify in speaking with named references) in previous settings. Essential to trust-building with each pre-candidate is that you keep the minister apprised of whom you plan to call.
- Weekend planning: have your weekend laid out!
 - Friday evening: informal dinner, get acquainted, early to bed
 - Saturday: interviews both ways, discuss letter of agreement, meet with professional staff members, sneaky tour of church, excursion around the community, free time, and dinner (nothing more in the evening).
 - Sunday: Church service at the “neutral pulpit” (don’t blow your cover!), then lunch with the candidate, candidate’s departure, and perhaps a quick debriefing by the committee.
- Confidentiality: How are you doing? Any near misses? Review your procedures and perhaps refine them.
- Interviews: have set questions, perhaps assigned to individuals, so interviews have some uniformity. There will be spontaneous questions as well, of course. Remember to give your prospects ample opportunity to present themselves fully and to ask questions of you.
- Agreement: go over the draft agreement fully, both compensation and expectations, to see what needs further exploration. Don’t be afraid of tough questions, but do remember that you should be creating a favorable impression of your congregation and, potentially, the basis for a long-term relationship.
- Voting: review your decisions about voting to eliminate candidates and for choosing the minister you will present to your congregation. Allow yourselves sufficient time to make these most important decisions, which will affect your congregation for years. It used to get pretty frantic, with congregations making unwise choices in order to be in first with an offer. The Transitions Office asks that no offers be extended or accepted prior to March 15. Give the minister some time to think it over.

- Letter of agreement: this should be settled and signed before you announce to your congregation that you have found your candidate.
- Communication: Decide how you will inform the Board and congregation about your choice, and do it in conjunction with your candidate and his/her communication with her/his church.
- For your candidate, and only with the minister's permission, speak with developed in the minister's current ministry setting. Once again, trust-building requires that you keep the minister apprised of whom you plan to call.
- For your candidate, and only with the minister's authorization, order a criminal record background check. The details are in *Responsible Staffing*, on line at http://www.uua.org/documents/mpl/transitions_responsiblestaffing.pdf and by link from the Transitions web site.
- Other candidates: let them know you have made a decision and return their packets with a cordial letter.

F. Candidating Week

- Make sure long before that the candidating week is well along in the planning stages, with the general schedule established and the necessary arrangements made. Let them know in no uncertain terms that a comfortable hotel or motel or B&B, suitable for a week's stay, is what must be provided, not home hospitality. Identify the person on your committee who will deal with your candidate on arrangements. At each of the week's events, at least one member of the search committee must be hospitably present.
- Remember that the candidate is *your candidate*, whom you are asking the congregation to endorse.

G. Post-Candidating Wrap-up

- Submit the "Notice of Ministerial Call" to the Transitions ice at once. It's on the web at <http://www.uua.org/leaders/leaderslibrary/transitions/21189.shtml> and by link from the Transitions web site.
- If this is your minister's first settlement, encourage him/her to participate in a Start-Up seminar scheduled for the coming spring by the Office of Professional Development. It is proper for the congregation to subsidize the cost.
- Decide on how you will wrap things up and whether you wish to serve on the Committee on Ministry or not.
- Send one of your packets to your District and leave one or two out and available to members, friends, visitors, and new members.
- Have a party! You worked hard for this.
- Stay involved in your congregation.

Appendices

Search Process Discussion Groups

(This program was designed for the Unitarian Universalist Church of Worcester, Massachusetts by Tamara Payne and Assoc. to assist the search committee in initiating small group discussions about the ministerial search process.)

Agenda:

- "Help wanted..."
- Interview Questions
- Concerns
- Profiles of Ministerial Candidates

(times indicated for each activity do not include debrief or discussion time)

Materials:

- 3x5 index cards f or each person (color A)
- 3x5 index cards for each person (color B)
- pens
- lined paper
- prepared "candidate profiles"

"HELP WANTED..."

(time: 10 minutes)

- Break into groups of two (no spouses or significant others)
- Pass out paper and a pen to each pair
- Each group write a 60-word "Want Ad" f or their -church. Focus on expressing what the church community is like and what the church is 'looking for in a new minister.
- Debrief: Each group read their ad aloud. Discuss common themes or notable points that emerge.

INTERVIEW QUESTIONS

(time: 5 minutes)

- Pass out 3x5 cards (color A) and a pen to each person.
- Each person should imagine that they are a member of the Search Committee.) "Some ministers have shown an interest in the church. You must come up with one interview question to be used as you interview these candidates."
- Debrief: Collect cards and read anonymously to the group. Discuss why each question is important.

CONCERNS

(time: 5 minutes)

- Pass out 3x5 cards (color B) and a pen to each person.
- Each person write an their card their biggest "concern" about the search for a new minister. This concern might be about the search process, the committee, or the new minister.
- Debrief: Collect cards and read anonymously to the group. Discuss people's concerns and the search process.

PROFILES OF MINISTERIAL CANDIDATES (time: 20 minutes)

(Note: It is recommended that the Search Committee compose three different ministerial profiles for distribution, each reflecting a different angle on the particular issues and needs of the church. Well constructed profiles will present well qualified but very different possible ministers such that the group must struggle with style, philosophy, compatibility, acceptance, and other issues that arise for the Search Committee during the process of finding a new minister. Alternatively, the profiles in the Resource Guide for Search Committees may be used.)

- Circulate a set of resumes or profiles of ministerial candidates to groups of four to six.
- Each small group must decide from these profiles whom they will hire as the new minister.
- Debrief: Discussion should focus on why that particular candidate was chosen over the others. Search Committee members should facilitate the discussion by playing "devil's advocate," pointing out pros and cons of each candidate. Discussion should also point out biases and assumptions that may be made (i.e. female candidate will not relocate, a person who hikes as a hobby is a loner, someone who plays golf and went to Harvard is "conservative, etc.).

Hearing from Children and Youth
An example of effective solicitation of information and opinion.

Search Committee Survey

Dear Children and Youth,

Our church is searching for a new minister. It takes a long time to find a new minister and there are many things that must be done before the entire congregation can call or ask someone to be our minister. We have a group of people that is spending a lot of time working on this. They--we--are called the Search Committee. It is on behalf of the Search Committee that I am writing to you.

One of the first steps the committee must take is a survey of the congregation. The answers that we receive from the survey will help us to understand what type of minister would be the best for us.

Each adult has been asked to complete a survey. We also want each child and youth to complete a survey. We know that you are very interested in who will be our new minister. When you complete your survey and return it before the deadline, you are helping us look for a new minister.

After you have completed your survey, be sure to return it to the church by Tuesday, July 31. You can either mail it or bring it to church with you on Sunday. You can leave your copy in the special box which has been placed in the foyer of the church.

Thank you for your help and have a great summer!

Best wishes,

/s/
Search Committee Chair

Survey for Individuals Aged 6-16 Years

1. Is our church the first church to which you have come?

[] Yes [] No

2. How many years have you been coming to our church? _____ years.

3. I am a [] girl [] boy

4. How old are you? _____ years

5. Are you an active member of the youth group?

- [] 1. No, I am not old enough (under 12 years old)
- [] 2. Yes
- [] 3. No

6. About how often do you come on Sunday during the school year?

- [] 1. A couple times a year
- [] 2. Once a month
- [] 3. Twice a month
- [] 4. Nearly every week

7. What three things do you like most about being part of our church on Sundays? (please check off three things)

- | | |
|---------------------------------|--------------------------------|
| [] 1. Church School Classes | [] 7. Youth Choir |
| [] 2. Worship with Ann | [] 8. Friends |
| [] 3. Chalice lighting | [] 9. Fellowship hour |
| [] 4. Worship in the Sanctuary | [] 10. Sunday field trips |
| [] 5. Minister's story | [] 11. Other (please specify) |
| [] 6. Singing | |

8. Do you like to attend other church-related activities (such as youth group, pot luck suppers, UNICEF Halloween Party, Ferry Beach, etc.)?

[] 1. Yes [] 2. No

9. The best thing about our church is (please write whatever you would like):

Neutral Pulpit Arrangements

(One MSR's tactic for encouraging cooperative arrangements)

Memo to: Ministers and Search Committees

With several Search Committees at work in our District, I'd like to review the process for neutral pulpit arrangements between Search Committees and host ministers, so everyone involved can feel all bases are covered, making for a satisfying and supportive relationship.

To Search Committees

Please consult the *Settlement Handbook*. In working with a host minister, provide that minister with the name, phone numbers and addresses of one Search Committee member who can easily be reached.

- A. If early contacts are made with a minister about tentative dates for a neutral pulpit in a given church, please establish an understanding with the minister about the deadline for cancellation or confirmation of the date.
- B. Once your Committee is firm on a candidate and date, please notify the host minister and the candidate, providing each with each other's phone numbers and addresses. This should be done in writing, even if you have used the phone initially. The arrangements for order of service, deadlines for church newsletter, etc. can be worked out between the host minister and the candidate.
- C. By Wednesday before the pre-candidating weekend, check with the host minister about final arrangements, i.e., who will greet you and introduce your pre-candidate.
- D. Send a thank-you note to the host minister following the weekend.

To Host Ministers

- A. If you give tentative dates to a Search Committee, make clear what date they must reply to you for cancellation or confirmation of said dates.
- B. Once a neutral pulpit date has been established and you have been furnished with the candidate's name, phone numbers, and addresses, write your colleague regarding the Sunday service arrangements, newsletter deadlines, etc.
- C. If you will not be in your church the Sunday of the neutral pulpit service, make sure a layperson is appointed to welcome and introduce your colleague. Further, inform the search committee and your colleague who that layperson will be.
- D. Make certain that you have one name and phone number from the Search Committee with whom you are making arrangements.

I am certain it is everyone's wish that the needs of local ministers and Search Committees can equally be served in the settlement process. Our process seems involved, at times cumbersome and plodding, but with cooperation from everyone I believe we can make it work. If you have comments, please be in touch with me.

***Equal Opportunity in Ministerial Settlement
UUA General Resolution***

WHEREAS the Principles and Purposes adopted in the By-Laws of the UUA specify that:

"We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote:

The inherent worth and dignity of every person;
justice, equity, and compassion in human relations";

WHEREAS equal opportunity calls for ministerial settlement procedures without discrimination because of race, color, disability, sex, affectional or sexual orientation, age, or national origin;

WHEREAS we are concerned that some member congregations have not practiced equal opportunity in the calling of ministers;

WHEREAS we are aware that some ministers have been discriminated against by some member congregations because of race, color, disability, sex, affectional or sexual orientation, age, or national origin; and

WHEREAS such discrimination is inconsistent with the Principles and Purposes of our covenant together;

THEREFORE BE IT RESOLVED that the 1989 General Assembly of the Unitarian Universalist Association:

- A. Requests that the Department of Ministry provide assistance to our member congregations in achieving equal opportunity in the ministerial selection process;
- B. Urges our member congregations to accept such assistance when it is offered; and
- C. Supports the Department of Ministry in its longstanding policy of sending to congregations candidate lists meeting equal opportunity criteria; and

BE IT FURTHER RESOLVED that the 1989 General Assembly urges the Unitarian Universalist Association Administration to further develop and to implement programs to combat such discrimination at the local society and district levels.

Tips on the Ministerial Psyche and How to Court It

by the Rev. Dr. Peter J. Luton

Good ministers are scooped up quickly! It is important that a Search Committee work as quickly as possible. It is important to do your homework and to gather your information; I urge you to be deliberate but not slow. Be efficient, fast and intentional. Push forward. Meet often. Delays will cost you come springtime when you try to precandidate people. Get your packet together. Start today gathering material. Have several copies on hand. Be ready to send it to a minister when you receive her or his name from the Transitions Office. I suggest you send your packet to everyone on your list. There is no reason to disqualify potential ministers before you know something about them. If at all possible, in December begin scheduling precandidating visits. Even if it is for a late March date. Good ministers will be offered several precandidating opportunities and you do not want someone in whom you are truly interested to be booked up when you call. Remember, most settled ministers only have one Sunday a month out of the pulpit—that translates into only three or four opportunities to precandidate between January and April.

~~~ Communication ~~~

Stay in constant contact. Quick and helpful communication is essential. I liked knowing that my packet had been received. I appreciated when phone calls were returned promptly and answers to my questions were provided. I also appreciated when the person calling was willing to chat and wasn't only business. I focused most of my pre-visit anxiety on the Sunday service. It was helpful to talk with the minister of the neutral pulpit well in advance of the visit. Newsletter blurbs, orders of service, questions about music—all of these take time and communication. Best not to rush on Thursday to get the order of service to the neutral pulpit for Sunday. Now maybe it's just the Luddite in me, but I much prefer the telephone to e-mail for most of the communication between Search Committees and precandidates. Talk to me, don't talk at me. E-mail is one-sided and impersonal. E-mail can be good when transferring specific pieces of information, though I found I usually had another question that arose from the e-mailed answer to my original question. E-mail is not effective, as far as I am concerned, with deepening understanding and developing relationships—and that is at the core of the dance of ministers and congregations.

~~~ The Packet ~~~

The packet prepared by the congregation is a significant piece of information that a potential precandidate receives about the congregation. He or she will read it very carefully. It should give the minister a great deal of information about how the congregation operates, its finances, its expectations, its history, its environment, issues, warts and skeletons, strengths, plans, dreams and purposes. In order to get a minister to read it, the packet must be attractive and easily used. I recommend a three-ring notebook. Plastic covers on each piece of paper help keep the packet neat and readable. Everything in the packet should be three-hole punched or placed

in its own well-labeled plastic pouch or folder. It is frustrating—as you will find reading ministers’ packets—if stuff continually falls out of the notebook. Put the name, address, telephone numbers, and e-mail address of the Search Committee contact person prominently in the front of the packet. The packet should give the minister a feel for the area the congregation serves. Include maps, brochures from the Chamber of Commerce, information about the cost of living, the schools, local government, cultural and entertainment opportunities and, of course, housing. Color pictures of the church building/s (inside and out) and of the community make the packet more attractive and informative. Include pictures of congregational activities, groups, classes, suppers, etc. Label each picture. Take advantage of color copiers and digital photography. Include letters from the Search Committee, the Church President, the Minister or Interim Minister, and the Director of Religious Education. These letters should describe the congregation from the perspective of the writer—what are the strengths, challenges and future of the congregation. Why should the minister consider coming to that congregation? The letter from the UUMA Chapter President can discuss the quality of collegiality and strengths of the District. Include in the packet orders of service from typical Sundays. I suggest including orders of service from both the past minister and the interim minister. If there is not a typical Sunday liturgy, indicate the variety of services that have been held. Include brief biographies of the staff and their job responsibilities. (Pictures of the staff are nice.) Include descriptions of the various groups within the congregation and all pamphlets, flyers and brochures you use. Include the Constitution and Bylaws. Send along some newsletters. Do you have an up-to-date vision and/or strategic plan? Include them. A minister will want to see the last three years’ budgets and actuals, as well as the current year-to-date financial report. These should be annotated sufficiently for someone who is unfamiliar with your accounting system and the names you give to everything. What is the Smith Fund, or the Capital Reserve II, or the Emerson Club? The packet should include information about pledging, rate of collection, number of pledging units and canvass history. Include minutes from the last three or four Annual Meetings and any pertinent reports from the Minister, Religious Education Director, Board of Trustees, Committee Chairs, etc. Include membership numbers and attendance records for children and adults—be honest. Include the budgeted cost of ministry broken down into salary and housing, benefits, and professional expenses. The packet is not confidential. You can use the talents and creativity of the members of the congregation. Make it good. Use it not to brag, but to show you are proud of your congregation and yourselves. It tells the minister how you feel about yourselves and how well you know yourselves. Be honest in your packet, especially about the challenges and issues you think are alive in the congregation.

~~~ The Survey ~~~

Often ministers and congregations focus on the survey. I personally did not find the survey particularly helpful. This does not mean that it should be ignored or brushed off, but rather that it should be taken for what it is—a numerical tabulation of a lot of questions. The fact that 85% of the congregation wants sermons that are

intellectually stimulating and only 27% likes responsive readings does not tell a minister much. I enjoyed when a packet reported numbers clearly and in different forms, i.e., pie charts, bar graphs, and percentage totals. Computers are wonderful for this kind of stuff. When I read surveys, I read them as the congregation's self-perception and not a factual account of the state of people's spirits and minds. The survey is suggestive—nothing more. I looked for glaring omissions or absences. I looked for contradictions and confirmations. (It says that religious education is important to the congregation, but the budget for R.E. is \$250. The survey says people like adult education and, what'dya know, the packet lists fifteen different adult classes last year!) One congregation listed all the comments people attached to the end of the survey. I found this list of raw one-liners to be very informative. The challenge for the Search Committee is to distill the tone and tenor of the congregation for the minister. This process of capturing what is going on for people and where the church is headed—or wants to head—is, in my experience, pretty subjective. Trust your intuitions.

~~~ Precandidating ~~~

Precandidating is nerve wracking. The whole process feels like one is being judged—not just on his or her performance and skills, but on one's very person and being. It felt as if a Search Committee was evaluating my very soul. From the minister's perspective, the church holds all the cards. This is not true, but that is how it often feels. I wanted to know what risks and benefits would come to me if I were to accept an invitation to be their minister. When I precandidated, I wanted to find out if I could love these people. Are these people who respect and value the ministry? Are they selfconscious or caught up in a false self-image? I wanted to know if stylistically and temperamentally we fit. Do I like these people? Do they seem to like me, to welcome me, to be open to me and what I might bring to them, or are they looking for someone or something else? I wanted to know about past ministries. And I had to ask myself, "How willing and able am I to change and adapt in order to meet and honor this congregation's personality?" The thing that impressed me most during precandidating weekends was how sensitive the Search Committee was to me and my desires, concerns, feelings. Did the Search Committee court me or quiz me? It is a very stressful exercise and everything the committee can do to help the precandidate feel welcome, safe and cared for speaks well for the congregation. Do not cut corners in order to save a few dollars. A minister will not be impressed by unrelenting frugality. An advance itinerary of the weekend is important both for the Search Committee and the precandidate. The temptation is to cram everything possible into a very short time. The minister expects the precandidating visit to be tiring and, like the Search Committee, she or he will want to accomplish a lot. This speaks to using the time well rather than filling every possible moment. Something that made a big difference for me—an introvert by nature—was to be greeted at the airport by one or two people who were knowledgeable about the congregation and the wider community and who were good conversationalists. My hosts were excited about their community and eager to share their thoughts and experiences with me. (I did not feel the necessity of keeping the conversation going.)

Relaxed meals with the Search Committee or individuals from the committee, breaks during the interviews, some time to myself, some time with a realtor, and a comfortable quiet place to sleep helped me enjoy my precandidating visits. I was pleased with the little, gracious things the Search Committee members did. One placed a basket of local goods and goodies and a vase of flowers in my room. Another arranged breakfast with a friend and colleague in the area. I was heartened when committee members asked me what I wanted to see, do, know; and when they checked in with me during the course of the weekend, asked as to whether or not I was comfortable with the process or the content of the visit to date. It may have been petty of me, but it left a bad taste in my mouth when one afternoon I was toured around in a car that was beat up, noisy and rough. The difficulty was that the car created an atmosphere in which it was harder for me to both enjoy the ride and to pay full attention to the conversation with the driver and other passenger. I was not impressed with Search Committees in which some members seemed not to have read my packet thoroughly. Nor was I impressed with Search Committees that seemed to make up the logistics as we went. (Where should we eat dinner? Who is going to take Peter to the church tomorrow?) I noted when a committee was unable to produce promised materials (e.g., past budgets, Mission Statements) or to explain various elements of congregational governance and finances. I trusted a Search Committee that was able to express differences of opinion, interpretation or emphasis in the course of the interview. I appreciated that the committee members were willing to disagree and be honest with one another and with me, that they were not putting forward an agreed-upon “party line” to create the appearance of unanimity. I was not looking to create fights, but to see how the congregation might deal with diversity and controversy. When a new minister arrives, there will be some disagreement, some rough edges, some tensions and frustrations, and I felt better going to a congregation in which those feelings and thoughts could be expressed openly and with love. Some precandidates may wish to include their partner in the precandidating weekend. A Search Committee needs to be aware of the difficult position in which ministers’ partners find themselves. They are going to be asked to move their lives, families, careers to a new place that they may have never visited, and to become members of a community they know not from atom. Attentiveness to the needs, concerns and interests of the partner goes a long way in presenting the congregation in the best possible light. Ministers want to know that the congregation values ministers and ministers’ families. At the same time, it is important to remember that you are searching for a minister, not a minister’s partner or children. I appreciated the Search Committee’s recognition that accepting a new call is an act of faith.

~~~ Conclusions ~~~

I spent a great deal of time studying packets, looking for clues about what it might be like to serve a particular congregation. I read everything and pored over the financial sheets. I ran up a large phone bill talking to former ministers, interim ministers, district executives, and colleagues and friends in the area. I wanted to know as much as possible about the congregation and the place. But for me, when you get right down to it, I

relied upon intuitive knowing and my feel for the place and the people. The places that did not appeal to me were just right for someone else, and the congregations that did not care for me were enamored of someone else. The search process works if congregations and ministers use it properly, being open and honest, staying true to themselves, remaining as non-defensive as possible and as clear as possible about what they need, want, and have to offer one another. I have offered some of my experience of the search process from the minister's point of view. I have not gotten into questions of what Search Committees can properly expect from ministers or the dynamics of a church that is looking for a minister. A discussion of such things would be most enlightening for ministers, but needs to come from the laity. I am convinced, however, that the better Search Committees and ministers understand what each other is experiencing, the more successful and enjoyable the process of finding one another will be.

Good luck, and enjoy the journey!