



Pacific Northwest District
Unitarian Universalist Association of Congregations

The Consulting and Part-time Ministry Handbook *for Congregations*

Note:

This handbook is applicable only to Consulting Ministry in the Pacific Northwest District of the UUA. Though others may find this guide helpful, it is important to understand that "Consulting Ministry" definitions and processes vary greatly around the UUA. Congregational representatives and UU clergy outside the PNWD must remember that the information presented here may make recommendations and offer resources that are not supported in other districts – and that PNWD may not support processes in use elsewhere.

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With grateful acknowledgement to the Rev. Anne Odin Heller, who created the first *Consulting Ministry Handbook* during her service as PNWD District Executive, 1994-2004. This handbook owes its existence to her exceptional dedication and inspiration.

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What is Consulting Ministry?

The term "Consulting Ministry" is evolving.

Over the past decade or more, the Pacific Northwest District (PNWD) of the Unitarian Universalist Association (UUA) has used this term to describe any contracted, part-time (two-thirds time or less) ministerial services provided to congregations by UU Ministers. These Consulting Ministers were always contracted, never "Called" and "Settled," as is the common terminology for a full-time, open-ended, exclusive-to-one-congregation professional ministry.

Congregations were advised to conduct a condensed form of search to select a Consulting Minister, including a Candidating Weekend and a vote by the congregation to approve the Ministry. The Consulting Minister's contract was for a one year term of service, usually renewable annually if mutually agreeable to Minister and Board.

Other districts have used the term differently, and recommended various processes to identify and select a Consulting Minister. The UUA had no particular interest in defining the term, since these arrangements intentionally did not involve the UUA Transitions Office (formerly known as the Settlement Office).

The UUA Transitions Office began using the term "Consulting Ministry" in 2006 or so for any type of contracted, transitional ministry that was not an official Interim Ministry. A three year "Consulting to Call" model was employed in some cases, and in others, a Consulting Minister could serve for a much longer period. These arrangements usually included the option to call the Consulting Minister to settlement after no less than two years of service – not an option with an Interim Minister.

As of 2011, the UUA Transitions Director has ceased using the term "Consulting Ministry," finding that it is impossible to define, given the number of local definitions and models that are used throughout the UUA. While the Transitions Office will now recognize Settled, Interim and Contract ministry, PNWD will continue to use Consulting Ministry to denote any professional congregational ministry that is

- formally contracted rather than called,
- not an Interim Ministry (as recognized by the UUA Transitions Office),
- more than regular supply preaching,
- defined to serve at least 1/4-time.

Almost always, a congregation choosing part-time Consulting Ministry does so because it does not have sufficient numbers – in membership or money – to

sustain a full-time, called (settled) Minister. Often, the Consulting Minister is the first professional clergy person to serve a congregation. Sometimes, a Consulting Minister will be sought when a congregation has had a negative experience with professional ministry, and is ready to try again. A Consulting Ministry offers the opportunity to explore professional ministry before considering a long-time settlement.

Some congregations move happily into an ongoing relationship with their Consulting Ministers, which may continue at the same level of part-time service, at an increased but still less-than-full-time level, or occasionally moving to full-time ministry together. Regardless of the percentage of service, if the congregation and Consulting Minister decide that their ministry together will be open-ended rather than for a specific term, and if they mutually agree that the Minister will serve that congregation exclusively, the relationship may be celebrated with a formal Call process.

Appendix A in this handbook explains various types of ministry. Please keep in mind that definitions may vary throughout the UUA, and search and support processes may vary from district to district. The search process outlined here for Consulting Ministry is patterned after, but does not strictly follow, the search process and resources offered by the UUA Transitions Office.

Will anyone help us with the search process?

The Pacific Northwest District maintains a Ministerial Transition Team that assists congregations throughout the search process for a professional minister, for either full-time or part-time positions. Other districts use a Ministerial Settlement Representative (MSR) to support full-time settlement coordinated through the UUA Transitions Office. Support for part-time position searches varies from district to district. **This handbook provides a guide to the process that is related to part-time positions in the PNWD only.**

If you are in search for a UU Minister who will serve your congregation in a part-time position, the District Executive will work with you initially and will assign a Transitions Consultant to continue to support your search process. The assigned Consultant will get acquainted with you, explain the search process, orient and serve as a resource to your Search Committee, see that you receive names of applicants, and respond to procedural questions. The Consultant will also make sure your information packet is in order so that you represent yourselves well to prospective applicants.

The Consultant may encourage you to post your position on the UUA Settlement System, if there is potential and desire to attract Ministers from out-of-the-area

who might be willing to relocate. Regardless, you'll benefit from educating yourself about the UUA search process. See <http://www.uua.org/careers/ministers/transitions/index.shtml> for a summary of resources. You may also want to read through the UUA's handbook on Consulting and Interim Ministries, at http://www.uua.org/documents/mpl/transitions/parttime_guidelines.pdf.

The first thing the Transitions Consultant will want you to do is to plan and budget for the search process, and select a Search Committee. More on that later.

Can we choose anyone to be our Consulting Minister?

There are many types of ministers, and lots of names to describe them. See Appendix A to review a summary of various types of professional ministry.

While UU congregations are free to choose any person to serve as Minister, the PNWD will only assist with the Consulting Minister search process when you are considering a UU Minister. Similarly, the UUA Transitions Office assists congregations with full-time search only for UU Ministers. This helps ensure that the UUA's specific standards of education, training and experience are met, which we believe is essential to the health and well being of our member congregations.

A UU Minister is a professional clergy person in Final or Preliminary Fellowship with the UUA. A Candidate for UU Ministry who is working towards preliminary fellowship may be eligible to apply as a Consulting Minister under certain circumstances. The Fellowship status of a potential Consulting Minister must be disclosed to the interviewing congregation, and should be considered seriously.

The Transitions Consultant or District Executive can provide additional information on UUA Fellowship standards.

Minister or building – which comes first?

Almost always ministry leads – and can help with – facility building. It is a simple fact that good ministry grows congregations, and a professional Minister's role is to help grow good ministry. Space and facilities can certainly help, especially if rented space is limited, but experience has certainly shown that the planning and capital investment necessary for a building can be achieved and sustained more effectively if strong ministry is there to lead it!

Is a Consulting Minister an Employee?

While your Consulting Minister will indeed be an employee of the congregation, UU Ministers have a special relationship with their congregations which is covenantal in nature. The board or personnel committee does not supervise the Minister on behalf of the congregation – rather, Minister and Board work together in covenant as peers and equal partners. It is very important for all congregational members to understand the interplay between *employment* and *covenant*, as this will support the success of your ministerial relationship.

Ordained ministers have special IRS status which recognizes the independent nature of the relationship between Minister and congregation. Ministers are considered employees for the purposes of income tax, but self-employed for the purposes of Social Security. Ministers may also receive a portion of their compensation as a “housing allowance,” which is not taxable.

Although congregations are exempt from the requirement of withholding income tax on ordained personnel, many Ministers elect withholding, and your congregation should honor this request. Likewise, it is standard practice in UU congregations to provide additional compensation to the Minister to cover the equivalent of the employer’s contribution to FICA (Social Security); this is considered taxable income. Your congregation will need to plan to report taxable earnings of your Minister on a W-2 form to the IRS.

In past decades, the PNWD advised congregations to consider their Consulting Ministers to be independent contractors rather than ministerial employees. We now believe it is more consistent with IRS guidelines and better practice for your congregation to treat Consulting Ministers as employees in the same sense as settled, full-time Ministers.

A good place to start in building your congregation’s understanding of managing employment of your Consulting Minister and other church staff is with the UUA’s website related to the office of Church Staff Finance. In particular, see “Clergy Tax Status” at http://www.uua.org/documents/mpl/finances/clergy_tax_rules.pdf and review the many resources for Fair Compensation for Congregations at <http://www.uua.org/careers/compensation/fair/index.shtml>.

If you have questions about the special handling of ministerial employment, the District’s Compensation Consultant can help. Contact your Transitions Consultant, the District Executive or see Appendix H for contact information.

What does a Consulting Minister Do?

Consulting Ministers, like all Ministers, serve their own calls to ministry as they serve your congregation. They will strive to be with you fully and faithfully as they perform the spiritual and ministerial functions you mutually determine. They are pastoral counselors. They seek to preach thoughtful and inspiring sermons. They provide prudent listening and wise counseling to the board and the committees and members of the congregation. They are cheerleaders, supporters, caring advisors, and non-anxious leaders in times of crisis or difficulty. They have received education and practical training as part of the requirements for being in UUA Ministerial Fellowship. Almost every congregation notices a real difference between “before” and “after” during Consulting Ministry.

Because your Consulting Minister is not serving you full-time, however, it is critical that both Minister and congregation agree that the Minister will have specific and particular work priorities during the limited time they spend with the congregation. Among those priorities that Minister and congregation may consider are:

- Preaching for an agreed upon number of Sundays each month
- Pastoral care and counseling
- Officiating at wedding ceremonies, memorial services, child dedications and other life celebrations and rites-of-passage
- Teaching adult religious education classes.
- Teaching the “New UU” class or leading newcomer orientations
- Writing a newsletter column
- Meeting with the board
- Meeting with specifically designated committees, such as the Membership Committee, or the Sunday Services Committee or Adult Education Committee
- Becoming acquainted with the community
- Helping to support social justice efforts
- Fundraising and budgeting advice; working with the Stewardship Committee and Finance Committee

Mutually agreed duties vary from congregation to congregation. But it is important to realize that the Consulting Minister has a proscribed number of days to spend with the congregation. Both Minister and members will need to pick and choose how the Minister will spend time with the congregation, and support one another in honoring the agreed upon time commitment.

Appendix C, "Tasks of Ministry in Part-Time Service Agreements," will help you consider usual tasks and time commitments of Consulting Ministry.

A memorandum that further defines anticipated duties is typically attached to the service agreement for Consulting Ministry. A sample is provided as Appendix D.

What stays the same with a Consulting Minister?

Most likely, the congregation will continue to plan and facilitate its own worship services, as it has before, with members, guests, pulpit supply Ministers, etc., filling the pulpit on "off" Sundays. Similarly, the congregation continues to conduct its committee meetings, programs and social events just as it has before. As before, the lay leadership bears the responsibility for the organizational infrastructure, for fundraising, for religious education programming, for social action/ justice work and for adult programs. Because the Minister will not be available to you full time, you will continue to need to plan for emergency and regular pastoral services.

If membership growth is an objective, the Sunday service should be the same or similar in format and ritual whether the Minister is there or not. You will want to work with the Consulting Minister to help achieve balance between professional and lay-led services, and to craft a liturgy (order of service) that is used every Sunday. This helps bring a feeling of continuity and a sense of the familiar to Sunday mornings.

What changes with a Consulting Minister?

Planning for future leadership.

As your congregation grows and prospers, you will want to plan for future leadership. Congregations that have grown used to one another can be reluctant to share power with newcomers, thinking that they won't know how or that they won't do it right or "if I really want it done I'd better do it myself." So there can be an inclination not to invite others in – including the Consulting Minister!

In order for members not to experience "burnout," it is a healthy practice to think about how the torch of leadership will be passed along, about how a natural succession will take place. Your Consulting Minister can be truly helpful with this, suggesting good practices for leadership development.

Making staff hiring decisions.

Sometimes congregations desiring growth are also considering hiring a Religious Educator, or a Music Director, or an Office Administrator. It is important to discuss this with the prospective Consulting Minister, and best to involve him or her in the decisions.

More often than not, the board will ask these new staff members to report to the Minister. Even if that won't be the case, you will want to be sure that they all look forward to working together. If you already have people in these positions in place, it is good practice to have your Consulting Ministry Candidate interview them before he or she makes the decision to accept your position.

Financial resources: growing a larger budget.

One of the necessities in adding ministry to your congregation is that you will need to grow a larger budget. It is very common for the addition of a Consulting Minister to attract new attendance and members. Often, there is a lag in income as new attendees undertake the discernment process that comes before membership (and pledge) commitment. Wise congregations will be prepared for this gap, through strategic planning, budgeting and an increase in the stewardship awareness that leads to greater income.

There are more and less effective ways to increase your income. You don't have to reinvent the wheel, and sometimes there are outside resources that can help. The PNWD Chalice Lighter grant program could be a possibility, for example. Contact the District Office to discuss your funding challenges and arrange for consultants or trainers who can help you develop effective growth plans, cultivate a stewardship consciousness and implement successful giving practices.

The need to be realistic about time and money.

Ministers in full-time positions tend to work more hours than a "regular" 40-50 hour week. So it is very important to have real agreement about the number of hours the Consulting Minister will be working part-time on your behalf. Through your congregational survey, by requesting a "Getting Ready for Ministry" workshop, and following up with a Leadership Covenant after your Consulting Minister arrives, your board, congregation and Consulting Minister can come to specific agreements about the number of hours the Minister will spend with the congregation, and about the work priorities that all will honor. (Appendix C explains more about time commitments of Consulting Ministry.)

Further, your congregation must be realistic about your funding capacity, even with the strong enthusiasm that may accompany your planning for a Consulting Minister. Your congregation should have completed its canvass / stewardship campaign and have next year's operating budget confidently in hand before any

contract for ministerial services is signed. It's simply not fair to the Minister to hold out the expectation of a year's work for an agreed upon amount of money, and then to renege on it. Make sure you will have the money available before you contract for consulting ministry.

What happens when the contract term ends?

You have choices, which of course must be discussed with your Minister:

- If your relationship with your current Consulting Minister is good, you can discuss with him/her the possibility of renewing or extending the service agreement. Your congregation should affirm this decision and budget additional funding to give your Minister an increase in compensation, recognizing the experience and insight s/he has gained and now offers you. OR,
- If your Consulting Minister has decided to move on, or if you feel it's time for your congregation to experience a different Consulting Ministry, contact the District Executive. Have a discussion at least four months prior to the stated ending date of your current service agreement so that the board and minister may reach a mutual decision to separate at the end of the contract term. When you have reached this agreement, notify the District Executive that your current Consulting Minister will not be continuing with you, and that you would like to begin a new search process for whatever percentage of time you wish.
- If you are ready to increase your part-time commitment or move to full-time ministry, your congregation is free to consider your Consulting Minister for the position. Your congregation may revise the contract, or you may consider calling the Consulting Minister to settlement. Contact the District Executive about revising your service agreement or considering the "Consulting to Call" process.

How much does Consulting Ministry cost?

The cost of Consulting Ministry, of course, varies according to the percentage of full-time and length of contract agreed upon by Minister and congregation. As independent entities, congregations are free to offer and Ministers are free to negotiate compensation as they wish. In order to participate in the PNWD Consulting Minister search process, however, member congregations are expected to meet standards which uphold our shared UU values. Generally speaking:

- Congregations with Consulting Ministers commit to contributing their Fair Share to the UUA Annual Program Fund (APF) and full PNWD annual dues.
- Consulting Ministers are paid based on the number of days per month they work with you. Full-time service is considered 6 days per week. See Appendix C for more information on how to figure the minister's time commitment for your position.
- Consulting Ministers can work quarter, third, half, two-thirds, or any other fraction of full-time that is mutually agreed. (See Appendix C.) Compensation is set accordingly.
- Congregations observe IRS regulations which allow ordained clergy to designate a portion of their compensation as a Housing Allowance, which is not subject to income tax. The housing allowance may not exceed actual cost of housing.
- Congregations honor the UUA compensation guidelines for UU Ministers and other church staff. These are updated annually and broken down by "geo-index" (based on salary and wage rates in your location) congregational size, and experience of the Minister or employee.
- Based on the portion of full-time the Consulting Minister will serve, congregations are expected to pay that percentage of Salary & Housing as well as benefits, according to the current UUA Compensation Guidelines. These guidelines reflect full-time service for a 12-month year, which includes paid time off. If service is limited to a partial year, compensation should be pro-rated accordingly.
- You may wish to take advantage the UUA's Compensation Calculator at http://www.uua.org/documents/mpl/transitions/compensation_calculator.pdf, adjusting for your percentage of full-time. In addition to salary & housing, congregations are expected to budget for a variety of service and employment-related expenses, contribute to various benefits and otherwise support a Minister's professional service to your congregation. So, plan to include 30-35% (more or less) above salary & housing, to cover or assist with:
 - 7.65% of wages in lieu of Employer's portion of FICA (Social Security tax, which you would be required to pay for non-ordained staff)
 - Assistance with premiums for medical and dental insurance, disability and life insurance, contributions to retirement plan, and Workers Compensation if required by state law (as it is in Oregon for ordained personnel).
 - Related telephone calls, FAXes, copies (in-house and off-site)

- Professional conferences, dues, etc., for continuing education and denominational service – which helps your Minister better serve your congregation, too
- Mileage accrued on behalf of the congregation, for continuing education and denominational service, at the current IRS business rate
- Consulting Ministers use the congregation’s office as their workplace when on-site, and will typically require a private study, computer with Internet access, telephone service, use of office equipment (copier, fax, etc.)
- It is wise for congregations to obtain evidence of health insurance coverage, and to urge Consulting Ministers to enroll in benefit programs available through the UUA. Congregations may arrange to pay premiums and contributions directly to UUA for these programs, on behalf of the Consulting Minister. UUA Guidelines adhere to the General Assembly resolution calling UU Congregations to provide health insurance to employees working half-time or more.

More information on the UUA Compensation Guidelines and a variety of other helpful material – including a handout explaining professional expense allowances – is available from the UUA Office of Church Staff Finance, at <http://www.uua.org/programs/ministry/finances/>.

Additional information on clergy tax status, very helpful if you are just learning about clergy pay, is available at http://www.uua.org/programs/ministry/finances/taxrules_clergy.html.

The UUA also provides a trained volunteer in each district to help congregations understand the sometimes complex world of staff compensation and how to structure your compensation package most advantageously for your Consulting Minister and for your congregation. See the Appendix H at the end of this handbook for contact information. Our Compensation Consultant is available at no charge to you by phone or email, and sometimes is able to visit your congregation, board or finance committee in person.

What about housing?

Consulting Ministers often do not live in the communities they serve. While congregations are not required to provide housing, your Minister will be well supported (and your position will be more attractive) if you are able to offer either suitable (private) accommodations in an apartment or “mother-in-law” unit with private entry, or a motel room.

Consulting Ministers occasionally are willing to stay in the home of members if they have a private room and bath. However, it should not be expected that they will socialize if they are staying with a member's family. Remember, they need time to work – and time off.

The fair-market rental value of provided housing, if any, should be considered in figuring the housing allowance offered by the congregation.

What is the search process for a Consulting Minister?

One option is to delegate the selection to the Board, which appoints a selection team to work with the District Executive to identify and interview candidates and make a recommendation to the Board. The board contracts the best matched candidate, rather than going through the process of a congregational review and vote. This can be a more expedient process where candidates are limited, and is particularly effective with a ¼-time position.

Another option is to conduct a search process for a Consulting Minister, which is like a shorter, simpler version of the UUA search process for a full-time, called, Settled Minister. This can be the right process to use where congregational trust is low, and is particularly recommended with positions of at least ½-time. The basic steps are outlined below:

1. The congregation decides to seek a Consulting Minister, by a vote at a congregational meeting. They understand their financial obligation to the position, and have committed to an operating budget which includes all costs of ministry: direct compensation and professional allowances as described above.
2. A member of the board of the congregation contacts the District Executive to open the search process for a Consulting Minister.
3. The District Executive will assign a Transitions Consultant, and may recommend a "Getting Ready for Ministry" or "Revisiting Ministry" workshop to help the congregation prepare for the new ministerial relationship.
4. The board meets or has a phone conference with the Transitions Consultant to review the search process and the process for creating a Search or Selection Committee.
5. The congregation elects a Search Committee (or the board appoints one) that is appropriately skilled and representative of the diversity of the

congregation. In the search for a full-time, called ministerial settlement, the search committee is always elected by the congregation; we recommend but do not require that you do likewise for your Consulting Minister search.

6. The Search Committee coordinates the remainder of the search process.

What does the Search Committee do?

Once formed, the Search Committee selects a chair and arranges a meeting schedule. They meet often and work hard during the search. Their work usually includes:

1. Meeting with the Transitions Consultant, for education related to the PNWD Consulting Ministry search process.
2. Dividing up the duties of the search, with two of the most important being (a) conducting a congregational survey to determine priorities for Consulting Ministry (see Appendix B – note this survey may be done on-line using the PNWD’s “Survey Monkey” account), and (b) developing and producing a packet to present the congregation to the applicants. Committee members decide who will take on which of the responsibilities of the search.
3. Exchanging packets with the accepted applicants on their list. The Search Committee maintains **absolute confidentiality** about all applicants, their qualifications, and/or any information pertaining to them. Applicant names and details are **not** shared with the Board or others in the congregation, and are not revealed to applicants.
4. Conducting in-person or telephone interviews with the accepted applicants. Arrange to hear the applicants preach in a worship service at another church (also called a “neutral pulpit”) or in a private meeting. Interview guidelines are provided as Appendix F.
5. Select a “short list” of prospects.
6. Review the short list and select a single “Candidate” to present to the congregation for consideration.
7. Plan and implement a “Candidating Weekend,” usually Friday evening through Sunday afternoon. The main tasks of the weekend are to allow the Candidate to meet as many congregants as possible and to conduct a

Sunday service. A sample schedule for a Candidating Weekend is provided as Appendix G.

8. In conjunction with the Candidate, develop a Consulting Ministry service agreement for board and congregational approval. The agreement outlines the Consulting Minister's duties, defines terms of employment, compensation, etc. A sample is provided as Appendix D.
9. Conducts a congregational vote to affirm the Candidate, and announce the result to the congregation and to the Candidate.
10. Inform all applicants and finalists, as well as the Transitions Consultant and the District Office, of the results of your search. When your service agreement has been accepted, send an announcement and photo to post as "News from Around the District" on the PNWD website, and ask the Minister or District Executive to advise the UUMA chapter president. The District Executive will work with local clergy to ensure that your new Consulting Minister is warmly welcomed, introduced to colleagues, and oriented to the UUMA chapter and the PNWD.
11. After the Consulting Minister is confirmed, members of the Search Committee often serve in the capacity of the first year's Committee on Ministry, until the Consulting Minister is ready to work with the board in appointing a committee for ensuing years. This will be a mutual discussion and decision between members of the Search Committee, the board and the Consulting Minister.

What is the Committee on Ministry?

Committees on Ministry (COM) are designed to understand, support and track the ministry of the congregation in general, working closely with the professional Minister. These committees go by various names, and duties vary according to congregational preference or tradition. Sometimes they are concerned primarily with ministerial relations, but a more current structure calls for the COM to take the lead in identifying and addressing congregational conflict, conducting whole-church ministry assessment, and serving in an ombudsperson role for church members who need assistance resolving their concerns about the ministry of the church.

You will want to discuss the appointment and structure of this important committee with your Consulting Minister.

Why is confidentiality important to the search process?

Confidentiality is of primary importance during the search process. This means that the Search Committee cannot even share information with their beloved spouses and partners! The clergy being considered by the Search Committee make a presumption of absolute confidentiality, which should be strictly observed.

It is important not to assume that anyone will keep confidential information to themselves, once that information is shared. Knowing who is being considered can rapidly lead to congregation members promoting or resisting a particular Candidate. Disclosing confidential information can also do harm to the Ministers you are interviewing – they may not have advised their current congregations that they are in search, preferring to wait until a new position is imminent.

What about references and background checks?

It may seem easier to disregard reference checking: “Oh, we know this person, so we won’t bother!” “This person is a UU Minister – the UUA must have done sufficient background checking!” But it is very much worth your while to have your Search Committee prepare a list of questions that ALL references will be asked. See Appendix F for guidelines and sample questions.

It is effective and useful to ask questions about the areas that your congregation is especially interested in having the Consulting Minister lead. For instance, if you need help with stewardship or finances, ask the folks you call how your applicant has done in that area. If they don’t know, ask them for the name of someone to talk to who would know.

Always thank references for their candor and assure them of your confidentiality.

The UUA has developed and strongly recommends a Responsible Staffing process, including formal background checks for all church staff, including Ministers, Directors of Religious Education, and volunteers. For more information, see Appendix F, and also check the UUA website for specific issues and recommendations:

<http://www.uua.org/programs/ministry/responsiblestaffing.html>

What is the Candidating Weekend all about?

When a single Candidate is selected by the Search Committee, it organizes a Candidating Weekend which provides multiple opportunities for congregation and Candidate to get acquainted. Typically, this is Thursday evening through the Sunday service. A sample schedule is provided in Appendix G.

Activities planned during the weekend might include an all-congregation potluck, a meeting with the Board and lay leadership, a meeting with long-term members, meetings with key committees that will work with the Consulting Minister, and a meeting with the Religious Educator (if there is one). The Search Committee also schedules the Sunday morning service at which the Candidate will preach. The Candidate (with a lay leader from the congregation) arranges the order of service, music, etc. for the Sunday service. Following the service, the Candidate leaves – to his/her hotel or a nearby restaurant, usually – while a quorum of the congregation, in a special meeting, votes yea or nay. It is a rule of thumb that a Candidate will not accept an invitation to a congregation unless s/he receives a vote of 85% or more in the affirmative. A successful ministry depends upon broad support and involvement, not a simple majority.

What happens when the Consulting Minister starts?

Almost all Consulting Ministries begin in the fall, with the start of the usual church year, though some begin mid-year. It is useful for the Consulting Minister and Board to plan a retreat for at least one solid day together early on, to get to know one another, discuss expectations of each other and begin planning the year. Sometimes, congregations prefer for this retreat to include the Committee on Ministry, key committee chairs and key staff as well. The District can provide a consultant to facilitate this retreat, if you desire. This process allows all participants to review work priorities of the Consulting Minister, and to build a leadership covenant together to focus the new shared ministry of the congregation.

Congregational leaders and the Consulting Minister are encouraged to stay in touch with the District Office and take advantage of resources and denominational help as needed and available.

What resources do Consulting Ministers have?

The Unitarian Universalist Minister's Association (UUMA) has developed guidelines for its membership, which describe both practical and ethical considerations.

Ministers in Fellowship with the UUA are generally held to these guidelines (unless they are not members of the UUMA, unusual for UU Ministers in good standing).

A UUMA Chapter Ethics Committee serves all member Ministers in the District, and always orients new members to UUMA and District practices. Consulting Ministers will be well supported by their colleagues, and should be encouraged to participate in chapter and national meetings and activities. They also have access to UUMA Good Offices volunteers who can provide specific support when confidential concerns arise.

The District Office and District Executive are excellent resources for your Consulting Minister, and a good place to start whenever questions come up. See Appendix H for other resources the District and UUA can offer.

How do we know we're ready for Consulting Ministry?

Here's a checklist for you. If you can check off at least 80% of the list, you're probably ready!

- You have at least 35 members in your congregation
- Your Sunday service attendance is regularly over 20 people
- Your congregation wants to grow and add programs
- The demographics of your area indicate growth is possible, and your congregation is willing to grow
- You have some kind of religious education program for children
- You have a regular meeting space
- You meet every Sunday, or at least three Sundays a month
- You have, as a congregation, discussed consulting ministry
- At least 85% of your congregation voted FOR consulting ministry
- You have a written annual operating budget
- You have an annual stewardship drive (canvass) and pledge follow-up through the year
- You have the resources, through your pledges or savings, to pay for costs of ministry
- You have a multi-year strategic plan which includes professional ministry at some level
- Your Board, Finance Committee and/or Stewardship Committee understand the UUA Compensation Guidelines or you have contacted the PNWD Compensation Consultant to help you with this
- You have requested a PNWD "Getting Ready for Ministry" or "Revisiting Ministry" workshop
- You have invited the District Executive or Transitions Consultant to discuss consulting ministry with your congregation
- You have some idea of how a Consulting Minister can help you
- You find the idea of consulting ministry exciting!

Please call the District Office to put you in touch with the District Executive, who can answer your questions or arrange to discuss Consulting Ministry further with your board and/or congregation.

Appendices

A: Types of Ministry

B: Sample Congregational Questionnaire

C: Tasks of Ministry in Part-Time Service Agreements

D: Sample Letter of Agreement for Consulting Ministry

E: Sample Memorandum Regarding Anticipated Duties

F: Guidelines for Interviews and Reference Checks

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Appendix A

Types of Ministry

(Adapted From *Churchworks: A Well-Body Book for Congregations*, by Anne Odin Heller – Skinner House, 1999, p.121-22)

Most UU congregations have one Minister for whom they search, invite into Candidacy, and call by a vote (usually 90% or more) of the congregation. Mid-size congregations may have more than one Minister; large congregations almost always do. Some congregations are served by contracted ministers, either full-time or part-time. Still other congregations have the benefit of visiting or mentoring ministers. There are a number of different names or titles for professional UU ministers and ministry; these are some in use in the PNWD.

Assistant Minister: Serves a congregation in either a general or specialized capacity and is usually hired by the Senior Minister and/or a Hiring Committee.

Associate Minister: Serves a congregation in a general or special capacity, and is called to do so by vote of the congregation.

Called Minister: Any Minister in fellowship that has been called into settlement by vote of the congregation.

Co-Minister: One of two or more Ministers in a peer relationship, called as a team to serve the same congregation.

Community Minister: A Minister who does not serve a congregation as its parish Minister, but who may be called or empowered to serve the congregation in other work in the larger community. Community Ministers are typically engaged in special projects or engaged by non-congregational organizations. A hospital, hospice or military chaplain, a community worker, or Ministers serving an academic community or employed by the UUA are all examples of Community Ministers.

Consulting Minister: A Minister who is contracted to serve a congregation for a limited time period, often renewable, typically according a year-to-year service agreement. Consulting ministers are occasionally full-time, but are more usually part-time (two-thirds or less). A Consulting Minister may serve more than one congregation, may also work as a Community Minister, or may be bi-vocational (work outside of UU ministry). A Consulting Minister is considered a Transitional Minister, helping a congregation develop in specific ways after a professional ministry has ended, as a first minister, or to focus on special growth or learning opportunities. Consulting Ministers may be called to settlement with the congregation.

Developmental Minister: A Consulting Minister specifically contracted to provide a first experience with professional ministry, or to work with a congregation wishing to re-examine the experience of professional ministry.

Intern Minister: A seminarian in a field-learning experience, supervised by the Parish Minister and an Intern Committee.

Interim Minister: A UU minister with special training in transitional ministry. Serves a congregation for short time – usually one or two years – while the congregation reviews its past and patterns, practices change, and undertakes the search for a Called Minister. Interim Ministers may not accept a call to the congregation. A UU minister who specializes in Interim Ministry may become an Accredited Interim Minister (AIM), or an Accredited Interim Minister in Training.

Mentoring Minister: A Minister who is sent by her/his congregation to support the development of another congregation, usually as part of a mentoring covenant between the two congregations. May also be a specially trained consultant commissioned by the District or UUA to support a congregation's development in a specific way.

Minister: Any ordained Minister; sometimes used for covenanted lay ministers as well. Not every ordained minister is a *UU Minister* – see the particular definition below. Some UUs are ordained only to the ministry of their specific congregation, not to the larger Association of Congregations.

Minister of Religious Education: An ordained Minister whose training and special gifts call him or her to work in religious education, usually primarily with children and youth.

Parish Minister: An ordained Minister who is called to work in and with a congregation, rather than in a specialized ministry such as community ministry.

Senior Minister: Lead minister of a multiple ministry staff.

Supply Preacher: A minister or Candidate for Ministry who provides a one-time or occasional sermon (pulpit supply), usually with minimal involvement in planning the Sunday service otherwise. A supply preacher is not expected to offer any other services to the congregation unless contracted to do so on a one-time or occasional basis.

Transitional Minister: A minister who serves a congregation in a time of transition, typically to support a congregation after a professional ministry has ended and as they prepare to search for a successor minister. Interim and Consulting Ministers are examples of Transitional Ministers.

UU Minister or Fellowshiped Minister: Any Minister who is in fellowship with the Unitarian Universalist Association – she or he has achieved credentials per UUA standards. A UU Minister is accepted into Preliminary Fellowship after meeting certain requirements, and must gain additional experience and recommendations before being granted Final Fellowship.

Visiting Minister: A “supply preacher” who may provide a sermon on a one-time or regular basis (e.g., monthly or quarterly), and/or may be contracted on a one-time or occasional basis to officiate rites of passage (weddings, memorial services, child dedications). Typically, a Visiting Minister does not provide additional ministerial or consulting services.

Appendix B

Sample Congregational Questionnaire

Note: You may take advantage of the PNWD "Survey Monkey" subscription to conduct your survey on-line. The sample survey below is already created; you can make a copy of this for your own use, and revise it however you see fit. Contact the District Office for details.

[Name of Congregation] Ministerial Search Committee Questionnaire

This is a survey of the members and friends of the [Name of Congregation]. We hope to receive the input of all members to aid us in our search for a Consulting Minister to serve us [insert percentage of part-time commitment expected].

Please return this survey at a Sunday service in [MONTH] or mail it to the Consulting Minister Search committee by [DEADLINE DATE], at this address: [insert mailing address]

The Minister

1. There are a variety of ministerial priorities, some of which are listed here. No Minister will have one priority exclusively, but you will help us determine the priorities that are essential in our church by indicating your own preferences.

Please rank the following priorities from 1 (highest) to 8 (lowest)

_____ An emphasis on congregational growth. This Minister will promote growth and encourage the liberal religious tradition in our congregation as a priority.

_____ An emphasis on "pastoral" tradition. This Minister devotes a great deal of energy to those people perceived to be in need: the ill, the troubled, the elderly. This Minister spends a great deal of time with counseling. Interpersonal relationships are extremely important.

_____ An emphasis on social activism. This Minister believes in the causes of peace and social justice. There is emphasis upon these themes both in the life of the church and in the personal life of the Minister.

_____ The work of a facilitator. This Minister performs the functions of the job with a low profile, regarding as a main asset the ability to involve other people in the life of the church community.

_____ The spiritual leader. This Minister will have a desire to promote spiritual growth both by example and by precept. There will be a great deal of spiritual growth foremost in the life of the church.

_____ The efficient administrator. This Minister will be keenly involved in the fiscal health of the church and in smooth organizational function. Coordination of the board, committees, etc. is regarded as a primary obligation.

_____ The emphasis on intellectual development. This Minister is a scholar, challenging the members of the congregation to develop their minds, to deal with the complexities of modern corporate, societal and individual life, and to develop defensible intellectual attitudes about these complexities.

_____ Write your own description (and rank with the others, too):

2. Of the following ministerial functions, rate each according to its importance to you:

	<u>Very</u> <u>important</u>	<u>Somewhat</u> <u>important</u>	<u>Not</u> <u>important</u>
Preaching	()	()	()
Personal counseling	()	()	()
Social action	()	()	()
Religious education, adult	()	()	()
Religious education, children	()	()	()
Administration	()	()	()
Expansion of membership	()	()	()
Making pastoral calls	()	()	()
Fundraising	()	()	()
Active in denominational activities	()	()	()
Building community	()	()	()
Facilities development	()	()	()

Please make any other comments you feel will help the Consulting Minister Search Committee better understand the priority qualities you desire in a Minister:

3. The objectives of Sunday services for you are

	<u>Very important</u>	<u>Somewhat important</u>	<u>Not important</u>
To inspire reverence and awe	()	()	()
To help us better understand ourselves	()	()	()
To encourage respite and reflection	()	()	()
To provide intellectual challenge	()	()	()
To share individual feelings and beliefs	()	()	()
To spur action on convictions	()	()	()
To learn religious tradition and history	()	()	()
To encourage compassion and generosity	()	()	()
To encourage spiritual growth and change	()	()	()

4. How much do you value or enjoy each of the following specific parts of our Sunday services?

	<u>Very important</u>	<u>Somewhat important</u>	<u>Not important</u>
Opening words/greetings	()	()	()
Singing by the congregation	()	()	()
Singing by the choir	()	()	()
Special instrumental or vocal music	()	()	()
Special dance or drama presentations	()	()	()
Readings by the Minister or members	()	()	()
Responsive readings	()	()	()
Silent meditation/prayer	()	()	()
Sermon	()	()	()
Announcements	()	()	()
Guest speakers	()	()	()
Sharing of joys and concerns	()	()	()
Chalice/community candle lighting	()	()	()
Children's attendance at service	()	()	()
Introduction of new members	()	()	()
Coffee hour	()	()	()
Intergenerational services	()	()	()
Children's story	()	()	()
Discussion of sermons	()	()	()

What other aspects would you like to see in the Sunday service?

5. What are the main things that you would like to see the congregation accomplish or get involved with in the next 3 – 5 years?

You and the church

6. Please indicate how you perceive the importance of the following in your church experience:

	<u>Very important</u>	<u>Somewhat important</u>	<u>Not important</u>
Music	()	()	()
Pastoral care	()	()	()
Children’s Religious Education	()	()	()
Social action	()	()	()
Social life/ sense of community	()	()	()
Sunday services	()	()	()
Meeting place/ appropriate facilities	()	()	()
Intellectual stimulation	()	()	()
Minister	()	()	()
Adult Religious Education	()	()	()
Building community	()	()	()
UU regional/national involvement	()	()	()

Other: _____

7. Which of the following statements most closely reflect your religious orientation? (Check as many as apply. If none seems adequate, add your own statement)

- ___ Theological Christianity. Jesus is a unique revelation of the divine.
- ___ Ethical Christianity. Jesus is a great moral teacher.
- ___ Judaism of some form.
- ___ Humanism. Human nature is the basis of all religion and ethics.
- ___ Atheism or non-theism. The concept of deity is not defensible or helpful.
- ___ Skepticism. There is no way of knowing the truth with regard to theological matters.
- ___ Agnosticism. I simply do not know “the truth” about theological matters.

- Ethical religion. The function of religion is to encourage the development of ethical matters.
- Naturalistic theism. The powers we have traditionally attributed to a supernatural God are inherent in the natural world, which elicits our respect and devotion.
- Mysticism. It is possible for humans to have a vital identification with the cosmos.
- Theism. God (Christian or other concepts) is the center of faith.
- Buddhism (any form).
- Earth centered spirituality which celebrates the sacred circle of life.
- Eclectic: Includes values from many different sources, including world religions.
- Other: _____

8. In which of the following activities do you consider yourself involved?

- Discussion Groups (book group, Big Questions, UU World, etc.)
- Social activities (camping, potlucks, circle suppers, singles, etc.)
- Adult Religious Education/ Exploration
- Children's Religious Education/ Exploration
- Sunday hospitality (greeter, usher, flowers, setup, refreshments, etc.)
- Music
- Social action (peace work, justice, anti-racism, food bank, etc.)
- Finance (budget, endowment or finance committee)
- Church administration (board member, membership committee, newsletter, building committee, nominating committee)
- Sunday services (lay leader, presenter, program committee)
- Joys and concerns, lay pastoral care
- Covenant groups (small group ministry)
- Fundraising (rummage sale, auctions, events, stewardship campaigns)
- Other: _____

9. What is your attitude toward growth of our congregation? (check one)

- Enthusiastic. We are responsible for making liberal religion more accessible. Growth should be a major goal of our congregation.
- Positive. I accept that growth is good, but want to assure that we maintain our feeling of community.
- Cautious. I recognize that we probably will grow, but I am hesitant to fully endorse an expansion program.
- Reluctant. I prefer to remain at our present size.

10. What role should church leadership take towards growth of our congregation? (check any that apply)

- Leadership should adopt growth as a major goal.

- ___ Our Minister should devote a major part of his/her time and effort to growth.
- ___ A Minister's administrative abilities and experience should be a major prerequisite for selection.
- ___ Our membership should be pressed for financial commitment to growth (operating and capital funds).
- ___ Leadership will support and foster demographic diversity, e.g. ethnic, racial; sexual orientation.

11. How many times do you typically attend Sunday services each month?

Demographics

This section is optional. It may be useful to give a new Minister some knowledge of who we are.

Are you a: member_____ friend_____ (Please check one)

Have you been associated with other UU societies? YES NO

How long have you been associated with this congregation?

0 - 2 years 3 - 5 years 6 - 10 Years 10+ years

How long have you been a UU?

0 - 2 years 3 - 5 years 6 - 10 Years 10+ years

Gender: Male Female Transgender

Your age

14 - 19 20 - 29 30 - 39 40 - 49
 50 - 59 60 - 69 70 - 79 80+

Marital status: Single Married Partnered

Divorced Widowed Separated

Children: (Note number of children in each category)

<u>Age</u>	<u>Number</u>	<u>Number in RE Program</u>
0-3		
4-6		
7-11		
12-18		

Appendix C

Tasks of Ministry in Part-Time Service Agreements

Developed by the Rev. Susan Maginn for the UUA Pacific Northwest

This document is intended to help congregations and ministers in considering the scope of ministry and crafting service agreements for part-time positions. These suggestions are influenced by the document "Joint Recommendations Concerning Ministerial Agreements," available as a download at the following link:

http://www.uua.org/documents/mpl/transitions/ministerial_agreements.pdf

In addition to preaching on Sunday, ministerial duties typically include:

- working with a worship committee to plan all aspects of Sunday services
- training lay leaders to support Sunday services, particularly those in which the minister is not preaching
- teaching the New UU/ Path to Membership classes
- teaching other adult education classes
- facilitating post-worship small group conversations
- keeping regular office hours
- meeting with members and friends privately on a variety of issues
- providing pastoral care for members at the church, in the home, in hospitals or care facilities, and in other ways
- attending board or committee meetings
- consulting with the board or committees by phone or e-mail
- supporting the annual pledge drive and a variety of ways, and advancing stewardship consciousness in general
- consulting on budget development and strategic planning
- advising on and supporting administrative tasks
- supporting community presence and public witness, including participating in local ecumenical and interfaith groups
- writing a monthly newsletter column
- supervising or meeting with staff (including the DRE)
- working with a Committee on Ministry (COM)

For a ministry position that is less than full-time, only a portion of the above can be addressed. The board and minister should mutually agree on which tasks are to be prioritized.

Time On-Site

Ministers serving in part-time positions often do not live in the local community. In that case, the congregation is encouraged to assist with travel costs and local housing in addition to providing the usual compensation. This can be considered in lieu of moving expenses.

NOTES ON "THE NUMBER OF SUNDAYS":

It is a generally followed and well-regarded practice that a full-time solo parish minister has one Sunday a month off, every month. Annually, the Joint Recommendations document also advises the following: "Leave typically includes a personal vacation at the rate of at least one month per year... Leave also includes one month [annually provided for study and research, which is] free of routine parish duties. During this time, the minister remains on-call for emergencies."

Summer services aside (since that's when ministers often, though not always, take vacation and study leave), that leaves 44 Sundays in the standard church year, September 1 through June 30. With the addition of Christmas Eve, that's 45 services. A full-time solo parish minister is typically given 1 Sunday a month off, leaving us with 35 services over 10 months. Full-time = leading worship ["pulpit duty," or "preaching"] at 35 services.

Using this number as our guide, part-time ministry would equal the following coverage of Sunday services:

Description	% of time	# of Sundays	(true math)
1/4 time	25%	8-9	8.75
1/3	33.3%	12	12.25
	40%	14	14
	45%	16	15.75
1/2 time	50%	17-18	17.5
	55%	19	19.25
	60%	21	21
2/3 time	65%	23	22.75
	70%	24-25	24.5
3/4 time	75%	26	26.25
	80%	28	28
	85%	30	29.75
	90%	31-32	31.5
	95%	33	33.25
Full time	100%	35	35

Appendix D

Sample Letter of Agreement for Consulting Ministry

This is an agreement between the Reverend *[NAME]*, hereinafter referred to as the "Minister," and the *[NAME OF CONGREGATION]*, hereinafter referred to as the "Congregation." The purpose of this agreement is to fulfill the desire of the Congregation to grow in membership and services to members.

The Minister agrees:

1. To serve as Minister of the Congregation between *[START DATE]* and *[END DATE]*, unless modified in writing by mutual agreement. This is considered a *[TIME COMMITMENT, E.G., ONE-HALF, ONE-QUARTER]* time position. The period from *[START OF VACATION TIME]* to *[END OF VACATION TIME]* is considered paid vacation time included within the period of this agreement.
2. To perform the usual and customary duties of a Minister to the extent allowed by part-time service. The Minister will observe the service priorities agreed on with the Board of Trustees in consultation with the Minister as set forth in a written memorandum. The Minister will adhere to The Code of Professional Practice and The Guidelines of the Unitarian Universalist Ministers Association.
3. To observe a ministerial schedule which places the Minister in *[LOCATION OF CONGREGATION]* for periods of approximately *[NUMBER]* days around the *[WHICH, E.G., SECOND AND FOURTH]* Sunday[s] of each month unless a different schedule is chosen by mutual agreement, e.g. to accommodate a holiday service or special observance. A typical schedule might be Saturday through Tuesday or Friday through Monday. The Minister further agrees to be reasonably available for consultation or pastoral care by telephone or e-mail at other times while away from *[LOCATION OF CONGREGATION]*.
4. The Minister expects to perform most sermon research and writing at her/his home.
5. To be available for extraordinary service with the understanding that either the Congregation through the Board of Trustees or members will provide appropriate compensation for such service.

The Congregation agrees:

1. To provide to the Minister direct compensation of *[AMOUNT]*, payable on the first of each month, to be allocated in the following categories by the Minister in consultation with the Board of Trustees.

- a. Salary of \$[AMOUNT] per month.
 - b. Housing allowance of \$[AMOUNT] per month; **and/or**
 - c. To provide suitable housing during Minister's scheduled time in [LOCATION OF CONGREGATION]. The housing shall include reasonable privacy and the capacity to arrive or depart at early or late hours without major intrusions on the hosts if the housing is in a private home, and shall be suitable for the Minister's spouse/ partner to stay, should s/he wish. Fair market rental value of such housing will be an in-kind housing allowance in the amount of \$[AMOUNT] per month.
2. To budget and provide for the benefit of the Minister up to \$[AMOUNT] to be allocated as an Accountable Reimbursement Plan in the following categories developed jointly by the Minister and the Board of Trustees, payable upon presentation of receipts or invoices for payment according to the financial policies of the Congregation. Minister may request that certain benefits such as insurance, pension and professional expenses be paid directly by the Congregation to the provider.
 - a. Pension, disability insurance and life insurance through the Unitarian Universalist Association or the Unitarian Universalist Ministers Association.
 - b. Health insurance through the Unitarian Universalist Association or a comparable plan provider.
 - c. Professional expenses such as travel and enrollment fees for continuing education, meetings of the UUA, UU Ministers Association, District, interfaith gatherings, library materials and other activities related to the position and calling of Ministry.
 3. To agree that, with the approval of the governing board, the Minister may reallocate funds among the various categories that are related to ministerial support. Funds not expended within one category may be allocated to others upon mutual agreement of the Minister and the Board. The Minister must, however, elect pension, health, and disability insurance coverage or provide the Board with adequate rationale for not doing so.
 4. To provide suitable office space for meetings, work and counseling and appropriate office equipment (including telephone service, a computer and printer and modem, copier access and similar materials) to serve and communicate with members and friends of the Congregation and on behalf of the Congregation.
 5. To form a Committee on Ministry to assist the Congregation and the Minister in assessing and affirming vibrant ministry. The committee shall consist of three members of the Congregation serving terms of two years. One member shall be appointed by the Board, one member shall be appointed by the Minister and one shall be appointed by the two appointees. The Committee on Ministry shall

regularly meet with the Minister and regularly announce their availability to meet with members of the Congregation. The Committee may report to the Board or the Congregation at its own initiative or by request of either body.

6. To re-examine this contract with the Minister in January, [YEAR] with specific consideration given the renewal of the contract for an additional year.
7. To cooperate fully with the Minister in the performance of his/her duties to the extent agreed on for a minister working part-time. The Minister shall have freedom of the pulpit and shall use his/her time as s/he deems necessary for the best fulfillment of the ministry consistent with the service priorities mentioned above.

In the event the Minister shall be incapacitated during the term of this contract, the congregation will continue the above payments for 30 days only if the disability occurs in the first two months of the contract and for 60 days only if the incapacitating disability occurs thereafter.

In the event either party wishes to terminate this Ministry, is agreed that a minimum of two months notice shall be given.

This Contract, when approved by the Board of Trustees, represents an official offer by the Congregation to call the Minister to its service.

Date Approved: _____ For the Congregation:

[PRINT NAME & TITLE]

Date Accepted: _____ By:

Consulting Minister

Appendix E

Sample Memorandum Regarding Anticipated Duties of the Consulting Minister

[NOTE: Your congregation and Minister may choose some of the duties listed below, or create others not listed. By no means is the following list meant to be indicative of a reasonable workload for a Consulting Minister!]

This memorandum is attached to the Letter of Agreement for Consulting Ministry between [Minister] and [Congregation], effective for the term of [beginning date] to [ending date].

Congregation and Minister agree that Minister will:

- Have primary responsibility for two Sunday services per month including sermon research and writing, preparation of service materials, cooperation with the music committee and Sunday service committee and the involvement of lay members in the services.
- Hold scheduled office hours for congregant calls or visits.
- Provide newsletter copy for Sunday services, adult education, a Minister's column and special notices.
- Attend Board meetings and/or present a Ministerial report at the Board meeting.
- Provide special consultation on growth issues. Meet and coordinate with officers of the congregation regarding planning, programs and opportunities.
- Attend and/or coordinate with the Sunday service committee, the Religious Education committee, Adult Religious Education committee, Music committee, Membership committee, Pastoral Care committee, Finance committee and other committees as needed and available, or as recommended by the President or Board.
- Work with the Religious Education coordinator and choir director to coordinate events and services.
- Conduct Adult Religious Education classes and workshops as available.
- Work with the Membership committee to welcome and orient newcomers and new members. Cooperate in follow-up of visitors and new members.
- Provide pastoral care, including hospital and home visits as needed in coordination with the Pastoral Care committee.
- Be available by telephone throughout the month at reasonable hours for consultation on congregational business or with members seeking support or counsel. Be available by e-mail for the same purposes.
- Attend church dinner or social events as available.
- Attend community social action/ social justice events as available.

- Attend district, UUA, interfaith or other meetings as available.
- Perform rites of passage for members including child dedications, marriage, memorial services, services of union and similar events consistent with contract limitations.
- Supervise church staff and work with Personnel Committee to ensure good human resource practices.

Appendix F

Guidelines for Interviews and Reference Checks

Interviews:

Typically a Search Committee begins by carefully reviewing the packet of materials sent by a Candidate. Those Ministers the Search Committee wishes to pursue are contacted right away (as often more than one congregation is looking for a Consulting Minister).

Arrangements are made to either attend a Sunday service conducted by the Candidate or to meet alone with the Candidate in a private location. If a Sunday service is possible, then the Committee will normally dine with the Candidate and arrange a place and time for a private interview after the service. If the Search Committee will need to hear the Candidate in private, then usually the Minister conducts a brief worship service, including sermon, for the committee first and then has a meeting time.

Allow generous time for these meetings! It is very important that neither the Minister nor the Search Committee members feel rushed. Usually each committee member has "their" questions plus general questions from the whole group.

Reference Checks:

(Adapt, as appropriate, if talking with a *personal* reference versus an *employment* reference.)

Hello. My name is _____. I'm a member of (name of congregation). (Name of Candidate) has applied for the position of Consulting Minister within our congregation. I have the responsibility to contact individuals who know (him/her) to better understand if (he/she) is a good match for the job.

May I ask you some questions?

1. What is your relationship with (name of Candidate)?
2. How long have you known him/her?
3. Describe the work for which he/she was responsible.
4. On a scale of 10 with 10 being the highest, how well did he/she perform in the job? (*note response*) Please elaborate, sharing his/her strongest attributes and areas in which he/she could have performed better.
5. What was/is his/her reason for leaving your employment?
6. Would you consider rehiring (name of Candidate), if the occasion arose? (*note response*) If no, please explain why.

7. To your knowledge, has he/she ever been accused of any behaviors that would be considered unethical, inappropriate or illegal? (*note response*) If yes, please explain.
8. (Name of Candidate) will be working with children and vulnerable individuals on occasion. Is there any reason to believe that children or vulnerable adults would not be safe with him/her? (*note response*) If yes, please explain.
9. As far as you know does (name of Candidate) have clear personal and professional boundaries? That is, can he/she say no when too many demands are put upon her/his personal time?

Here are some additional questions you might consider – be sure everyone uses the same questions, though!

10. Does (name of Candidate) tend to have a strong support system?
11. Does (name of Candidate) have strong family ties?
12. Is (name of Candidate) warm and available to her/his congregants?
13. Is (name of Candidate) a strong leader?
14. Does (name of Candidate) implement the vision of the congregation with clarity?
15. Is (name of Candidate) strong on pastoral care? Can you give some examples?
16. Have you known of a personal life crisis that (name of Candidate) has had and how he/she handled it?
17. Have you experienced or do you have a perception of how (name of Candidate) would handle a difference of opinion on issues with a congregant?
18. Have you experienced or do you have a perception of how (name of Candidate) would handle a difficult pastoral care issue?
19. What is the most significant contribution that (name of Candidate) has made to the UU ministry?
20. What has been the greatest challenge presented to (name of Candidate)?
21. Is there anything in his/her personal and professional life that we should know?
22. Would you want (name of Candidate) as your Minister?

At this point ask the Reference to add whatever they wish to the reference.

Appendix G

Sample Candidating Weekend Schedule

Thursday:

- Lunch with Search Committee members
- Dinner with Board Members
- Evening brief meeting with Worship/Program committee and Music committee

Friday:

- Morning to look around the area and congregation's meeting space and office
- Lunch with long-term members and available leaders
- Afternoon visit house-bound or other members
- Dinner with Finance Committee and Stewardship Committee members
- Evening open

Saturday:

- Morning gathering with Religious Education and Adult Education Staff
- Lunch with parents plus RE staff and volunteers
- Afternoon: meet with social action and related programs. Meet with Board members and Search Committee about contract language. Meet with youth groups and advisors.
- Potluck dinner for the whole congregation
- End by 8:30 p.m.

Sunday:

- Worship service
- Congregational meeting and vote
- Notify the Candidate of congregational decision
- Candidate and Search Committee members meet before concluding the weekend; review any observations from the weekend and congratulate each other on making it through the process!

Appendix H

District and UUA Resources

- ☞ **Make these your first stops on the Web:** www.pnwd.org and www.uua.org – explore menus & search functions at both sites. Details on all PNWD resources referenced below are available at the District website. At the UUA site, make a point of reviewing the “Resources for Healthy, Vital Congregations” at <http://www.uua.org/management/index.shtml>.
- ☞ **Congregational Handbook:** A comprehensive resource of organizational knowledge for congregations, available at the UUA website at <http://www.uua.org/cde/handbook/>.
- ☞ **District Calendar:** Check this web listing frequently for training and other events for lay leaders. Post your own, too, so your UU neighbors can join you for fellowship or education.
- ☞ **District Assembly:** A weekend of great workshops, presentations and networking, with locations moving around the District each year. Includes PNWD’s Annual General Meeting (AGM), to elect the district board and manage other business of the district. Attendance is usually in the range of 200-500. Watch the PNWD website for details. Your congregation should plan and budget to send voting delegates and your Consulting Minister.
- ☞ **General Assembly (GA):** Five days of nationally recognized speakers, workshops, vendors, inspiration and fellowship with several thousand UUs from around the country and beyond. Sites move around the U.S. each year. Watch the UUA website and congregational packets for details. Your congregation should plan and budget to send voting delegates and your Consulting Minister.
- ☞ **Shared Resources:** Borrow a “Standing on the Side of Love,” use “Survey Monkey” and take advantage other items the district maintains for the use of all congregations.
- ☞ **District Consultants and Mentors:** Services offered include financial and stewardship consulting, conflict assessment and healthy communications training, leadership development, growth and strategic planning, transitions assistance, all-ages Religious Education and Youth Program development. Tailored workshops and consultations are available. Full Fair Share congregations (UUA Annual Program Fund and PNWD dues) receive a 50% discount on consulting fees!

- ☞ **Chalice Lighter grants:** The Chalice Lighter program encourages growth of new and existing congregations in the Pacific Northwest District. It is funded exclusively through contributions from UUs who participate as Chalice Lighters, contributing at least \$15 three times per year. Nifty member pin, too.
- ☞ **Talk to your UU neighbors:** PNWD encourages networking via email lists for Congregation Presidents and program coordinators. See <http://www.pnwd.org/emaillists.aspx>. The UUA offers a wide range of lists also! See <http://lists.uua.org/mailman/listinfo>. Be sure to post your news and read the news of other congregations at the PNWD website as well – <http://news.pnwd.org/>.
- ☞ **Certification and Congregational Information:** Your administrator or other authorized person must certify your membership to the UUA each February. See more information at <http://www.uua.org/directory/data/18482.shtml>. Use this same link to keep your member and leadership lists updated with the UUA so your members will receive the *UU World* magazine and various leadership communications. From time to time, the PNWD will also request updates to our online directory of congregational information, kept by state at <http://www.pnwd.org/congregations.aspx>. Please let us know anytime you make a change in leadership personnel.
- ☞ **Congregational Bulletins:** Subscribe to the PNWD News at <http://news.pnwd.org/>, and we'll send you an email alert with each new posting. The UUA sends an electronic bulletin monthly, except in summer, with action items and a variety of information on new programs and resources. These will come to your congregation office email address. Or, find them anytime on the web at <http://www.uua.org/communications/bulletin/index.shtml>.
- ☞ **Interconnections:** This UUA newsletter for lay leaders is sent electronically to each of your board members and committee chairs – assuming you've added them to the mailing list by updating your UUA information form once each year! The newsletter is also available on-line, with searchable archives. See <http://www.uua.org/interconnections/>.
- ☞ **UU World:** Every member of your congregation will receive this monthly print magazine – IF you've subscribed them to the mailing list! An on-line version is also available at <http://www.uua.org/world>.
- ☞ **Supply Preaching Directory and List of Officiants:** A listing of UU Ministers willing to speak from your pulpit on occasion, or to perform ceremonies such as weddings, memorials and child dedications. A chart of standard fees is included in both directories. Available anytime at

http://library.pnwd.org/documents/DIR_SupplyPreaching.pdf
http://library.pnwd.org/documents/DIR_Officiants_SpServices.pdf

☞ ***Churchworks: A Well-Body Book for Congregations***, by the Rev. Anne Odin Heller (Skinner House, 1999). Available from the UUA bookstore.

PNWD and UUA Resource Persons and Offices

(Current as of the revision date on the cover page of this document)

YOUR TRANSITIONS CONSULTANT: (Will be assigned by District Executive – add information here)

Name:

Phone:

Email Address:

UUA Compensation Consultant

Peter Henrickson - Vancouver, WA

Mobile: (360) 608-8571

peter.henrickson@alumni.reed.edu

UUA Church Staff Finances

<http://www.uua.org/careers/compensation/index.shtml>

UUA Transitions Office (formerly, Settlement Office)

<http://www.uua.org/careers/ministers/transitions/index.shtml>

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Tandi Rogers, Program Specialist

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