

PREPARING FOR THE MINISTERIAL SEARCH

HANDOUT 1: THE SEARCH COMMITTEE BUDGET

[As of: February 16, 2015]

The general rule of thumb on the amount needed to carry out a successful search is \$9,000 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 congregation to congregation.

Preparing for a Ministerial Search workshop:	\$175 (MTT facilitator)
Search Committee Retreat:	\$300 (MTT facilitator)
	\$500 (food & lodging for participants)
	\$250 (MTT sermon honorarium)
Search web site:	\$700
Committee members' expenses	\$1000 (or more, depending on location)
(mileage to pre-candidating sites, meals and lodging as required)	
Pre-candidating visits	\$3500
(travel, housing, meals for pre-candidates and committee)	
Candidating week	\$2000
(Travel for candidate and family and nine days of accommodations etc.; again, depending on location)	
Startup workshop	\$300 (MTT facilitator)
Total	\$8,725

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

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HANDOUT 2: 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.

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HANDOUT 3: 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 Regional Transitions Consultant 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 UUA 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:

- “Application for Minister” (available at the Search Committee’s web page in the Ministerial Settlement System at <http://www2.uua.org/ministerapp.asp>)
- Your congregation’s current agreement or contract
- 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>)
- 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

- Church and Clergy Tax Guide by Richard Hammar. Call 1-800-222-1840 or go on line to purchase.

What Should the Agreement Include?

Review the 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.

1. 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:

- 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?
- 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?
- 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?
- Pension contribution: at least 10% of S&H unless you want your minister to work forever.
- 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.
- 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?

2. 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:

- a. 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?
- b. Office hours: what expectations and how rigid?
- c. Day off: what expectations are most reasonable?
- d. 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.
- e. 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?
- f. Evaluations: how often, and conducted by whom? (See the helpful publication, *Assessing Our Leadership*, <http://www.uua.org/documents/mpl/assessingleadership.pdf>)
- g. Vacation, study leave, and continuing education: how much of each? Who pays when minister is called back from any of these?
- h. Sabbatical leave: what are the conditions?
- i. Sick leave: what is a reasonable understanding on this?
- j. Starting date: reach a decision about this. If the church is on a "church year," the UUA recommends August 15.
- k. Moving expenses: what will be covered and what is the amount available?
- l. 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?
- m. 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.

Finally, 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!

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HANDOUT 4: GUIDELINES FOR NOMINATING COMMITTEES WITH REGARD TO MINISTERIAL SEARCH COMMITTEES

For the Board and Search Committee

The kind of person to seek:

- 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."
- One who is committed to UU pluralism in every area: theology, life styles, social concern, etc.
- One who is patiently able to work for consensus rather than insisting upon majority rule or minority tyranny.
- 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.
- One without rigid requirements regarding ministerial state, sex, marital status, age, etc.
- 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.
- 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.
- One who very evidently has the confidence of the Congregation.
- 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.
- One of irenic, cooperative disposition: not disputatious.

The kind of person to avoid:

- One with limited and high-intensity interests; one who defines the Church in narrow, exclusive terms

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

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HANDOUT 5: APPLICATION FOR MEMBERSHIP ON THE MINISTERIAL SEARCH COMMITTEE

Name _____

Address _____

Phone work _____ home _____ Cell _____

E-Mail _____

Years in this Church _____ Years a Unitarian Universalist _____

Committees Served _____

I believe the purpose of our church is (attach statement):

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

___ Age

___ Sexual orientation

___ Marital status

___ Gender

___ Attitude toward diversity in church membership

___ Sexual identity

___ Previous experience

___ Leadership style

___ Denominational involvement

___ Theology

___ Ethnicity

___ Other _____

___ Race

___ Other _____

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

___ Administration

___ Pastoral care

___ Community outreach

___ Preaching and worship

___ Counseling

___ Religious education

___ Finance

___ Social justice

___ Knowledge of Unitarian Universalism

___ Fund-raising

___ Other _____

___ Other

___ Other _____

___ 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 _____

Attach photo

Deadline for applications -

All applications will be posted for the congregation.

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HANDOUT 6: ONE EXCELLENT WAY TO CHOOSE A SEARCH COMMITTEE

The process is a bit time intensive. It does seem to produce good results and a high degree of respect and trust for both the new search committee and the board.

1. The board and perhaps the Nominating Committee divide up all the households in the congregation and place a call to every single household. Set a date for completing calls.
2. Each household should be told that it is critical to have input from everyone in the congregation in order to put together an effective Ministerial Search Committee. Questions to consider when selecting Search Committee members are:
 - Who can represent the whole congregation well (which would include looking out for the needs of children) and not just a piece or “faction” of the church? Who would have “no axe to grind” and who can serve the entire congregation?
 - Who in the congregation works well with others?
 - Who knows the history and culture of the church, whether old or newer to the congregation, and is grounded in our faith tradition?
 - Who can speak to a potential minister about our congregation on its best and worst days, about its strengths and weaknesses?

After thinking about these questions, who in the congregation would have your trust in working on our common behalf on our Search Committee?

The board/nominating committee member should take down the names of the persons listed for the last question.

[Note: If the caller reaches voice-mail or an answering device, a message with those questions will be left and the member will be invited to call back with their response. No follow-up phone calls need be made; if you want to weigh in, you have the opportunity to do so by phoning back.]

3. Someone else on the board, a good data manager, collects all the suggested names from the callers and makes a spread sheet, noting how many times very person suggested has been named. (The whole board need not see all this data).
4. The data manager reports to the Board the top 12-14 names. *(It's best to do the list where there is a natural break in the numbers. For example, the top 13 people got mentioned more than 20 times. Person number 14 on the list was mentioned 16 times. The next three were mentioned 14 times. The natural break is after person number 13.)*

5. Board members call this short list to see if these people are interested in running and agree to give up any other leadership position they hold if chosen for the Search Committee.
6. A written ballot is prepared. The names are listed alphabetically. The voting happens at a congregational meeting.
7. Written statements from all candidates stating why they want to be on the committee should be posted along with pictures, if possible.
8. The vote happens. At the end of the meeting the board meets in executive session and counts ballots. The top 4 are elected. The board then appoints 3 others from the names on the ballot. *(The appointments are important. This improves the odds of diversity on the search committee and not just the seven elders dearly loved by the congregation. The broader the demographic the better, especially in regards to age, gender, race/ethnicity, sexual orientation, areas of participation in the congregation).*
9. The Board announces the search committee, never telling anyone who was elected and who was appointed (including to the search committee.)
10. The next Sunday the search committee should be introduced with some fanfare. There might even be a small commissioning moment in the service and/or a taking of some vows to serve the congregation.

Follow all steps carefully and thoroughly. Such measures will produce the best results. To date, congregations that have followed this process with deliberateness and integrity have reported having a search committee that is respected, trusted, and representative by and to the congregation.

This process comes from UU interim minister, Rev. David Keyes.

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HANDOUT 7: 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.

1. Things that need to be completed soon:
 - Receive visit from Compensation Consultant
 - Fill out questions 1-3 and 5-8 on “Preparing for the Ministerial Search” and return to Arc of Care Team consultant.
2. Choose a Search Committee of seven members. There are many ways you may do this.
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 congregation’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 congregation from the nightmare of different factions advocating different candidates.