

# TRANSITIONAL MINISTRY HANDBOOK

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*A Guide for Congregations and Ministers*  
*(formerly Interim and Consulting Ministries Handbook)*

*Transitions Office*

*Unitarian Universalist Association*

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Publications referred to in this Handbook can be found on the Transitions Office website:

<http://www.uua.org/transitions>



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### **Introduction: Ministry—Called, Interim, or Consulting?**

This Transitional Ministry Handbook is for the use of congregations whose long-term health may best be served by a time-limited ministry in the immediate future. Congregations that are well along in dealing with transitional issues and who are preparing to go into search for a minister to call to a long-term covenantal relationship should see instead the UUA's Settlement Handbook for Ministers and congregations, which provides detailed guidance to an inclusive and equitable search process.

#### **Why might a time-limited ministry better serve? Consider the following situations:**

1. A previous minister is departing . . .
  - After serving the church for five years or more—long enough, if a senior or sole ministry, for a significant number of the congregation to identify the church with the departed minister
  - As the result of dying: the death of a minister while serving is always a traumatic event for a congregation
  - Under pressure, with tension and resentment filling the air
  - In the midst of conflict: a congregation racked with mutual disappointment, mistrust, and anger is in no condition to enter into a new relationship
2. The ministerial position is coming open at a time of year that makes a search for a called minister impracticable. Generally speaking, a settled minister search committee should be formed a year in advance of candidating week, and candidating week, almost always in April or May, is usually three or four months before the minister begins service.
3. A growth-oriented, goal-oriented congregation wants a ministerial “coach” for the purpose of stepping beyond its current size dynamic
4. A large congregation needs a strong “hold the fort” minister in an assistant or associate position while going into search for a minister to be settled in that capacity
5. Factors such as small size, remote location, and limited finances make success in the called minister search process unlikely; such factors lead to disappointment in attempts to secure an interim minister, as well
6. The congregation is at a challenging stage in its development. Whether due to deep differences, chronic conflict, serious financial problems, or an inability to agree on mission and vision, the congregation may need three to five years to get its house in order before it seeks to call a minister.
7. The position is for an assistant minister. Because they work under the direct supervision of a senior minister, assistant ministers are usually hired, often but not always with the proviso that they may be considered for a call after the passage of a stated period of time.

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The first and second of these seven situations make interim ministry advisable almost universally. Interim ministers are recognized for their ability to assist congregations in coming to terms with their past and claiming their new identity as they ready themselves for a stimulating relationship with a new settled minister. In order to guarantee their ability to speak the truth “without fear or favor,” interim ministers agree not to serve beyond two years in any congregation, and not to be a candidate for the called position until they have been absent from the congregation for at least three years. In an average year some ninety North American congregations are served by interim ministers—more than 10% of all congregations continent-wide that are served by full-time ministry!

Fewer congregations face the other five situations. But as the number of consulting arrangements in private industry has grown in the past twenty years, so too the expressed need for similar flexibility in addressing short-term needs among Unitarian Universalist congregations. The UUA is developing training and resources to equip ministers to meet those needs. While consulting contracts may be from year to year or three or even five years in duration, there is no stipulation that the minister may not at some point be called to that or another ministry position in the congregation.

### **When Ministers Are Scarce**

From time to time a minister cannot be found to serve a congregation in need. In a number of recent instances the UUA Transitions Director, the UUA Ministerial Credentialing Director, and the District Executive have collaborated to provide a transfer minister or a student in candidate status to serve such a congregation. The UUA’s Ministerial Fellowship Committee’s Rules and Policies, to which students and other candidates are accountable, seek to prevent a candidate eager to serve from getting ahead of his or her training or transfer process. Those in candidacy status are required “to defer accepting any ministerial position other than internships and student ministries unless approved by the Ministerial Credentialing Director. Violation of this policy shall render the candidate ineligible for an interview with the Ministerial Fellowship Committee or Ministerial Fellowship for four years from the commencement of the position.” Because the District Executive is familiar with the congregation, and thus able to describe the abilities needed for a candidate to serve effectively, and because the Ministerial Credentialing Director is well-positioned to judge a candidate’s possession of those abilities, the congregation’s risk in hiring a candidate is kept to a reasonable minimum. The candidate will be expected to ask a minister in final fellowship to serve as a mentor, and to be in frequent contact with the DE. A minister-to-be serving under this arrangement should be able to expect compensation equal to at least 90 percent of the UUA-recommended minimum, taking into account size and wage rate area.

### Interim Ministry

#### Change: Anxiety-Provoking and Liberating

News of a minister's departure may be received with distress by many, but other feelings are inevitably present: approval of the departure's timeliness, relief at its finally taking place, even unseemly joy. The purpose of interim ministry is to enable a congregation to call a successor minister based not reflexively but on the basis of its own independent identity, strength, and direction—in sum, based on its health.

It is difficult to overstate the opportunities provided to a congregation during an interim period. Rarely in the life of any human institution—congregation, business, nation, or household—is there such a chance to begin anew. The interim period following the end of one relationship and preceding the beginning of another offers such an opportunity, providing the breathing space during which a congregation can review its goals, assess its programs, consider the quality of its life in common, and “tune up” for a new era. The one- to two-year period it usually takes for a congregation to grow into and own its identity, independent of both positive and negative feelings about the ministry that has come to an end, can be exciting, even transformative, when devoted to self-examination and institutional renewal. A palate cleanser, one might say.

Although people's initial instinct will often be to simply hunker down and “hold the fort,” it is inevitable that as the power structure realigns, some will step back and others forward to fill the power vacuum caused by ministerial vacancy. As the lid comes off, anxieties may first express themselves over relatively mundane matters—who will see to filling the pulpit? who to the provision of pastoral care? who to rites of passage, administration, supervising the staff, locking up the church?—but soon more serious concerns unearth themselves. The church staff feels overwhelmed, momentum stalls, new members and even some long-timers back away, the canvass falls short. Anxiety-driven conflict rends the fabric of congregational life. Compounded, these stresses will weigh heavily on the present, yes, but also on prospects for a successor ministry.

For twenty-five years now Unitarian Universalist congregations, many of the mainline Protestant denominations, and synagogues of all traditions have depended on interim ministry to deal with the phenomenon of transition. They have done so largely in response to an important Alban Institute study which established the fact that congregations not hiring an intentional interim minister during a ministerial transition often find themselves having called an “unintentional interim minister” instead. At best the next minister will have heavy going. At worst the minister will not last. And indeed, among Unitarian Universalist congregations the practice of hiring an interim minister following a ministerial departure is almost universal.

To enable congregations to heal and to enrich their sense of religious community during this transitional period, the specially trained interim minister seeks to:

- Bring the reassurance that a seasoned professional is working with the congregation. Momentum will not be lost. The search for a new minister will not be unduly pressured. The disaffected can return freely.

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- Deal with "termination emotions" surrounding the former minister who, whether beloved or disliked, was at the center of a web of relationships now tender, often torn. Unless these emotions are discharged, they will wait to be dumped onto the following settled minister.
- Help the congregation review its operations and clarify its goals. The new called minister will thus find the congregation to be a moving train, instead of a stalled bus waiting for a driver—or a mechanic!
- Model a different but still successful style of ministry, thus showing the congregation (for many of whom the departed minister may have been the only UU minister they've ever known) that more than one ministerial style can be effective.

Additional guidance on the possibilities offered by an interim ministry can be found in two fine Alban Institute books on the subject: Roger Nicholson's *Temporary Shepherds: A Congregational Handbook for Interim Ministry* (1998) and Loren Mead's *A Change of Pastors, and How It Affects Change in the Congregation* (2005).

### **About Accredited Interim Ministry**

There have always been ministers available to fill a vacant pulpit until a new minister is called. However, recognition of the complexities inherent in this period has led the Unitarian Universalist Association's Transitions Office to develop a specialized program for ministers who make interim work their calling. The Accredited Interim Minister (AIM) designation is conferred on ministers who complete the program, attesting to their competence both in parish ministry and as resident consultants, able to assist congregations in reviewing and revitalizing their operations. In addition to carrying out the normal responsibilities of congregational ministry, including worship and pastoral care, they possess specific skills in assisting a congregation in:

- Claiming and honoring its past and engaging and honoring its griefs and conflicts
- Recognizing its unique identity and its strengths, needs, and challenges
- Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
- Making appropriate use of District, UUA, and other outside resources
- Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

Ministers who have been admitted to this program and are currently involved in prescribed training are referred to as Accredited Interim Ministers-in-Training (AIMITs). To learn about the requirements for admission to and completion of this program, see Appendix E.

The number of congregations requesting interim ministers always exceeds the number of AIMS and AIMITs available. The gap is filled by ministers in various circumstances: new seminary graduates, transfers into our ministry from other denominations, returnees to the parish from other work, recent retirees seeking only temporary posts, and ministers growing restive or discontented in their current settlement and believing

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a year's temporary position preferable to continuation in place. The UUA provides a three-day "Fundamentals of Transitional Ministry" course for ministers about to do interim ministry for the first time, conducted by the Interim Ministry Network, an Alban Institute-connected training organization. Ministers commit 1.25 percent of their salary (i.e. of salary plus housing allowance) toward the cost of the Orientation.

### **The Transition Team**

Interim ministers bring a consultant's approach and a consultant's skills—and need the access and assistance that will make their ministry as effective as possible. Thus interim ministers need full access to several years of financial and stewardship information, including pledges made and pledges paid. They need, too, a Transition Team: five to seven members who are widely known and respected and well acquainted with the congregation's history. Their role is to provide the Interim Minister with insight, organizational and facilitative talent, and willing hands as the ministry proceeds. Because the Transition Team is an interim minister's "brain trust," it would be inappropriate for any member of the Team to have served on the Committee on Ministry during the previous ministry or to be in relationship with a current member of the governing board. During the interim period any existing Committee on Ministry should thus be suspended. The Transition Team's first duty is to set up early meetings between the interim minister and important congregational leaders: every member of the governing board, every committee chair, every other person the Transition Team views as a leader, and every paid staff member—as well as the Ministerial Search Committee (if yet formed) and the Transition Team itself.

### **Finding and Hiring an Interim Minister**

Your District Executive is your local guide during the interim search period. Your DE will discuss with you specific options for your immediate future in the light of your current situation. Perhaps you may wish to watch *The Interim Opportunity*, a Transitions Office-produced DVD on the role and purpose of interim ministry, together. The video is also available directly from our homepage for flexible viewing.

If your congregation has already been in touch or even met with your local Ministerial Settlement Representative, please remember that this person is of great use to you during your search for a called minister only. For questions during the interim search you are advised to contact your DE or the Transitions Office; the MSR is not trained to answer interim process questions.

Unlike a called minister, whose "call" comes from the congregation as a whole, interim ministers are hired by the governing board. Because an interim minister's placement is only temporary, because the time between the minister's announcement of departure and the interim's desired arrival is short, and because the demand for AIMs, AIMITs, and other experienced interim ministers exceeds the supply, the interim hiring process is simple, brief, and competitive. For the usual August start, applications received in the Transitions Office by April 15 that meet the conditions described in "Compensation and Other Contractual Matters" (below) will be eligible for the early preference pool for AIMs and AIMITs. Otherwise, applications will receive first come, first served consideration.

The Transitions Director strives to supply to each congregation a list of interim ministers most capable of serving it well, taking into account both the terms of its offer and the needs of all congregations from which an application has been received. A congregation interested in being served by a particular interim minister is

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asked to direct its interest to the Transitions Office, not to the minister. Ministers are specifically discouraged from sub rosa politicking among congregations for an interim position.

### **Step-by-Step Guide**

#### **The governing board . . .**

1. Votes to hire an interim minister
2. Submits an on-line Application for an Interim or Consulting Minister (Appendix A)
3. Appoints an interim task force, often a board subcommittee, to identify and recommend to the board the appropriate interim minister
4. Covenants with the departing minister around the manner and timing of departure

#### **The interim task force . . .**

1. Readies an informational packet

The task force's packet will include: several recent orders of service, several current newsletters, the annual report, budgets for the current and preceding years, the by-laws, a church directory, any current short- or long-range plan, the departing minister's resignation announcement, the proposed interim contract, the names of District or UUA staff members familiar with the congregation as references, and information on the locale

#### **The prospective interim minister . . .**

1. Completes a Ministerial Record on the Settlement System
2. Submits the Application for an Interim or Consulting Ministry Position
3. Readies an informational packet

The minister's packet will include: sermon texts, sample newsletter articles, perhaps a reflection on the role of the interim minister, the names of leaders of current and former congregations as references, and a photo that may be used for publicity purposes if agreement is reached

#### **The Transitions Director . . .**

Lists (usually) five appropriate ministers, making their Ministerial Records available online to the task force beginning in the last week of April. Specific date noted annually in application confirmation sent to task force in early April.

#### **The interim task force . . .**

1. After studying the Ministerial Records, determines its interest in each minister, and delegates one member to call each to discover if interest is reciprocated
2. Exchanges packets by express carrier or electronically with ministers in whom it is interested

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3. Reviews the packets and calls all references, including UUA District Staff of the candidate's current District, whether listed as a reference or not. Questions appropriate for references and potential ministers are a work-in-progress. No list is available currently.
4. Conducts an interview, face-to-face or by conference call, all committee members present, with each minister with whom there is mutual interest, reviewing the proposed contract as part of the phone conversation
5. Decides upon its favored candidate and informs the minister of its decision. To insure adequate deliberation, we ask that no offers be made or accepted before noon Eastern time on Friday May 7, 2009 (date subject to tweaking in following years). Specific date noted annually in application confirmation sent to task force in early April.
6. With the minister's acknowledgement, calls additional references it may have turned up in speaking with the references the minister provided
7. With the minister, executes and exchanges copies of the contract, subject if necessary only to approval by the governing board and a satisfactory criminal records background check (if not completed by the signing date)
8. Conducts criminal records background check of the minister
9. If desired, within the week brings the minister into town at the congregation's expense; this visit can also include a search for rental housing
10. Presents the minister to the board in conjunction with this visit, if any, or otherwise immediately
11. Returns packets promptly (within one business day) to those not selected

### **The governing board . . .**

1. Satisfies itself that the task force has done an adequate job of checking reference and conducting a background check
2. Reviews and acts on the recommendation, up or down
3. If the decision is affirmative, approves the contract, negotiating within hours such points as may remain
4. E-mails a copy of the contract to the Transitions Office
5. If the decision is negative, directs the task force either to seek agreement with its second choice or to ask the Transitions Director for an additional list

### **The incoming interim minister . . .**

1. Once having the board-approved contract in hand, terminates talks with other interim task forces
2. Contacts the departing minister to coordinates the "changing of the guard"
3. Contacts the District Executive to begin a collaborative relationship

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### **Compensation and Other Contractual Matters**

Some years ago interim ministers were compensated at the rate of the departing minister. This is no longer the case. The UUA's comprehensive compensation guidelines apply to all ministers: interim, settled, and consulting. See the "Compensation Calculator" on the Transitions website for details. Also recommended is an additional 1 percent of Salary plus Housing for ministers attending a UUA-sponsored transitional ministry continuing education event. See Appendix B below for the recommended contract itself.

The contract is brief, as befits an engagement arrived at with dispatch. Note that it incorporates by reference the customary relationship between a minister and a congregation, and the obligations of each, as described in Model Agreement B in Joint Recommendations Concerning Ministerial Agreements.

Because AIMs and AIMITs spend half the summer each year in the arduous task of relocating, often seeking to counteract the loneliness of their chosen field by maintaining a permanent residence to which they return for renewal, and because other ministers serving in an interim capacity are generally in search for a permanent settlement, needing time for pre-candidating weekends and, if all goes well, a candidating week during the spring, the Transitions Office recommends that all interim ministers be granted eight weeks of paid vacation. One common arrangement in the case of AIMs is for a congregation to pay its departing minister through July and to pay the interim minister from August through the following July, with the initial and final months designated as vacation. Another is to contract with the interim minister for September through August, with July and August taken as vacation. Similar in result but more flexible still is for a congregation to contract with its interim for ten months of service, paying for it over twelve months.

When a congregation hires a minister who must relocate in order to reside within fifty miles of the church to be served, the church should expect to provide 100 percent of all eligible relocation actually incurred, up to 10 percent of salary plus housing. Eligible expenses include the minister's transportation to the interim site by air, rail, or car, with lodging en route, and moving by a licensed moving company of the minister's professional materials, personal items, household effects, and automobile. It is the minister's responsibility to keep accurate records and accompanying receipts.

Interim ministers who maintain a permanent residence outside of the locale in which they serve may wish to treat many of their expenses as tax-exempt reimbursable business expenses under IRC Secs. 949-954A. Richard Hammar's Church and Clergy Tax Guide or C.C.H.'s U.S. Master Tax Guide should be consulted. The congregation may wish to seek its own tax advice.

### **The Interim Period Begins**

The education of a congregation about the opportunities that lie before them in the interim period, and the role of the interim minister in helping the congregation to seize the day, is not the work of a single newsletter article only. The governing board can make the interim period immeasurably more productive by witnessing, in various ways and in various settings, to the opportunity the interim period offers to become accustomed to the inevitability of change.

At the same time, the arrival of the interim minister should be seen as an opportunity for the person-to-person ministry without which congregational life is an emotional desert. Assistance in getting settled, help in unpacking, a casserole, a street map, the name of a trusted doctor or dentist, the loan of furniture to an

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interim minister travelling light—such warmth and thoughtfulness will set the tone for a relationship of mutual care.

### **The Interim Minister and the Ministerial Search Committee**

The effectiveness and integrity of the interim ministry rest upon the twin facts that the minister wasn't there before and won't be there long. To maintain the integrity of their role, all interim ministers pledge three things, without which no interim ministry contract will be considered valid:

Every interim minister agrees not to become a candidate for that congregation's called ministry. This limitation both assures the interim process the time to complete itself, rather than terminating prematurely in the warmth of candidating, and it also avoids placing the interim minister in a crippling conflict of interest: only because the interim minister is in no way a candidate for a permanent position can the ability to speak in candor, without risk of reprisal be assured.

Every senior or sole interim minister agrees not to serve a congregation for more than two years. These time limitations guarantee the interim minister's objectivity and create a beneficial sense of urgency; both the interim minister and the congregation are more likely to engage in creating healthy change if they know that their time together is short. In rare cases the period of service of interim MREs, associate, and assistant ministers may be extended, but only with the approval of the Transitions Director in consultation with UUA District Staff.

Every interim minister agrees not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee. Again, the primary reason is to avoid giving one candidate (someone the interim minister may know) an unfair advantage—or disadvantage.

Nevertheless, the ministerial search committee is by no means abandoned. Its main source of counsel during its search is the District's Ministerial Settlement Representative. Jointly nominated by the UUA District Board and the Chapter of the UU Ministers Association, the MSR is a volunteer appointed by the Transitions Director to guide congregations in search. A collaborative relationship between the MSR and the interim minister will benefit the search committee in its work.

The interim minister is encouraged to assist the search committee by:

1. Offering pastoral care to the search committee
2. Bringing congregational concerns to the notice of the search committee
3. Coaching the search committee on communications with the congregation
4. Offering response to the committee's Congregational Record and ministerial and congregational profiles
5. Writing a "Letter from the Interim Minister" for the search committee's packet
6. Participating in a mock interview or acting as process observer as the search committee conducts a mock interview with a neighboring minister
7. Preaching on the nature and role of ministry
8. Witnessing for a realistic ministerial agreement and fair compensation

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Any other involvement of the interim minister with the committee must be with the agreement of the MSR and the Transitions Director.

### **Interim Progress Appraisal**

The Transitions Office requests that the governing board and the interim minister independently appraise the congregation's progress toward the goals set for the interim period. The two completed appraisals should be shared with one another and then transmitted electronically to the Transitions Office: for a one-year ministry, by February 15 and June 15; for a two-year ministry, by February 15 of the first year and September 30 and June 15 of the second. Forms for the process are appended (see Appendix G).

Mid-interim Progress Appraisals offer the opportunity of a mid-course correction to both the minister and the board. In addition to reviewing progress toward goals, the appraisal process can function as a valuable model of creative interchange between minister and congregation, giving the leadership essential practice, on a relatively "no-fault" basis, in providing constructive feedback to and receiving it from its minister in an (ideally) constructive way. Conducted in an atmosphere of openness and candor, the appraisals should also address unvoiced expectations and assumptions, miscues, disappointments, and non-productive behaviors, in order to make the most of the interim period. End-of-interim appraisals, to be completed before the conclusion of the ministry, may be cursory unless the results are likely to be sharply different from the previous, mid-term appraisal.

Appraisals not shared with all who serve are without value. The Transitions Office is not interested in receiving after-the-fact complaints about an interim minister. No amount of hindsight can ever disentangle the tight interweave of congregational and ministerial responsibility for things not going perfectly. Whatever challenges or disappointments the interim period provides are best seen as learning opportunities for minister and congregation.

When the Transitions Office may be of further assistance, please e-mail or phone us. We are here to be of service in the "in-between" times.

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### **APPLICATION FOR AN INTERIM OR CONSULTING MINISTER**

Due April 15 for August Placement

This Application for an Interim or Consulting Minister must be completed and submitted online. Congregations in search of a consulting minister should also complete a Congregational Record. Congregations in search of an interim minister should not try to complete a Congregational Record. Below is the information that will be requested on the Application within the Ministerial Settlement System.

Congregation: \_\_\_\_\_ # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Ministry desired (check all that apply):  Interim  Consulting  Other (describe in Notes below)

Beginning date of ministry \_\_\_\_\_

Duration of ministry: One year (second optional) \_\_\_\_\_ Two years \_\_\_\_\_ Other \_\_\_\_\_

(Interim ministry is limited to two years. For a ministry other than one or two years, describe in Notes below)

Date of vote to go into search for a minister: Governing Board \_\_\_\_\_ Congregation (optional) \_\_\_\_\_

Number of adult members: \_\_\_\_\_ Av. Sunday attendance: \_\_\_\_\_

Children & youth enrollment: \_\_\_\_\_ Av. children & youth attendance: \_\_\_\_\_

Total operating expenditures: \$ \_\_\_\_\_

Total operating pledge income: \$ \_\_\_\_\_ Number of pledge units: \_\_\_\_\_

How many Sunday services? \_\_\_\_\_ Others during the week? \_\_\_\_\_

Congregation Size

(Drop-down: Small, Mid-Sized I, Mid-sized II, Mid-sized III, Large I, Large II): \_\_\_\_\_

Congregation Wage Rate Area (1-5): \_\_\_\_\_

Salary plus Housing offered (if no range): \$ \_\_\_\_\_

Salary plus Housing offered (if range): minimum \$ \_\_\_\_\_, midpoint \$ \_\_\_\_\_, maximum \$ \_\_\_\_\_

Do the benefits and professional expenses provided for this position meet (or even exceed) the Transitions Office Compensation Guidelines? Y/N (If No, explain in Notes)

Is the minister expected to occupy a parsonage? Y/N

If so, how much of the S&H is attributable to rental value? \_\_\_\_\_ To utilities? \_\_\_\_\_

Median monthly rent for two-bedroom apartment in congregation's vicinity \$ \_\_\_\_\_

IF AN INTERIM MINISTRY POSITION, THE CONGREGATION SHOULD BE PROVIDED WITH THE FOLLOWING STATEMENT BEFORE THE INTERIM MINISTRY PROGRAM IS VOTED

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It is understood, in accordance with the established policy of the Unitarian Universalist Association, that the interim minister is pledged not to become a candidate for the congregation's called ministry, not to serve the congregation for more than two years (with a limited exception for interim ministers of religious education and interim associate and assistant ministers), and not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee.

It is also understood that interim ministers both carry out the normal responsibilities of congregational ministry, including worship and pastoral care, and also assist the congregation in addressing the following interim tasks:

1. Claiming and honoring its past and engaging and acknowledging its griefs and conflicts
2. Recognizing its unique identity and its strengths, needs, and challenges
3. Understanding the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
4. Making appropriate use of District, UUA, and other outside resources
5. Renewing its vision, strengthening its stewardship, preparing for new growth and new professional leadership, ready to embrace the future with anticipation and zest

Notes: Please note below any additions to or explanation of your entries above, and any issues of special concern or great importance to your congregation. If the application is for a consulting minister, describe the objectives of the ministry.

Contact person and title \_\_\_\_\_

Tel: \_\_\_\_\_ E-mail: \_\_\_\_\_

Date submitted \_\_\_\_\_

## INTERIM MINISTRY CONTRACT

### Recommended by the Transitions Office of the Unitarian Universalist Association

This is an agreement between the Rev. \_\_\_\_\_, hereinafter the "Interim Minister," and the Governing Board of \_\_\_\_\_, hereinafter the "Governing Board."

#### **The Interim Minister agrees:**

1. To serve as interim minister of the Congregation for the period beginning \_\_\_\_\_ and ending \_\_\_\_\_.
2. To carry out the normal responsibilities of congregational ministry, including worship and pastoral care, and also assist the congregation in addressing the following interim tasks:
  - Caiming and honoring its past and engaging and acknowledging its griefs and conflicts
  - Recognizing its unique identity and its strengths, needs, and challenges
  - Understanding the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
  - Making appropriate use of District, UUA, and other outside resources, and
  - Renewing its vision, strengthening its stewardship, preparing for new growth and new professional leadership, ready to embrace the future with anticipation and zest
3. Not to become a candidate for the congregation's called ministry until at least three years after the interim ministry's end, not to serve the congregation for more than two years (with a limited exception for interim ministers of religious education and interim associate and assistant ministers), and not to discuss specific prospective candidates for the called ministry of the congregation with the ministerial search committee.
4. To attend an annual UUA-sponsored continuing education event:
  - Orientation to Transitional Ministry or its equivalent for a first-time interim minister
  - Accredited Interim Ministry Seminar for an Accredited Interim Minister or AIM in Training.

#### **The Governing Board agrees:**

1. To provide the following compensation, benefits, and professional expenses:
  - A. Salary plus Housing Allowance (S&H), payable monthly on or before the fifteenth day of each month, beginning on July 15, 20\_\_).

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- Salary of \$\_\_\_\_\_.
  - the Governing Board will consider the minister's request that a portion of Salary be designated Housing Allowance once the minister has ascertained the likely domiciliary costs to be incurred, or
  - the Interim Minister shall have free use of the parsonage at [insert address], including the utilities and furnishings listed in the appendix. All reasonable and necessary maintenance and repairs will be performed promptly at the Congregation's expense. The fair rental value is estimated at \$\_\_\_\_\_.
- B. Benefits
- In lieu of employer's FICA, at 7.65 percent of S&H, payable monthly.
  - Retirement plan contribution made by due date to the Unitarian Universalist Organizations Retirement Plan and/or other appropriate pension plan, of 10 percent of total Salary and Housing.
  - Insurance premiums:
    - a. Medical insurance: 80 percent of premium for the Interim Minister; 50% of premium for spouse/partner and dependents is strongly encouraged
    - b. Disability income insurance for the minister, 100 percent of premium
- C. Professional and out-of-pocket expenses: The greater of 10 percent of S&H or \$5,000 plus the greater of an additional 1 percent or \$500 plus travel expenses for a UUA-sponsored transitional ministry continuing education event, payable promptly on voucher by the Interim Minister in accordance with an Accountable Reimbursement Plan developed jointly by the Interim Minister, President, and Treasurer. In addition to that event (see "The Interim Minister agrees" #4 above), other expenses for reimbursement include, but are not limited to, travel, automobile mileage, lodging, meals, incidentals, conference registration, entertainment, pulpit gowns, books, periodicals, dues, office equipment such as computers, and other continuing education events. It shall be the practice of the Congregation to reimburse such expenses at the maximum rate allowed by the tax laws.
2. The total cost to the congregation of salary and housing plus the additional benefits and professional expenses is \$\_\_\_\_\_. The Governing Board and the Minister may, upon mutual agreement, and before the beginning of a tax or employment year, allocate funds among various categories to provide the minister with an optimum array of benefits. The congregation is strongly urged to require the minister to participate in pension, health, and long term disability income insurance plans.
3. To reimburse the Interim Minister up to a maximum of \$\_\_\_\_\_ (10 percent of Salary plus Housing Allowance is recommended) for all eligible relocation expenses actually incurred in relocating from \_\_\_\_\_ (Interim Minister's present residence) to

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a location in or near \_\_\_\_\_ (location of Congregation). Eligible expenses include transportation of the Interim Minister by air, rail, or car, with lodging (reasonable local rate) in route, and moving by a licensed moving company of the minister's professional materials, personal items, household effects, and automobile.

4. To relieve the Interim Minister of all responsibilities and to permit her/his absence from the area for a total of eight weeks of paid vacation during the contract year.
5. To regard the Interim Minister's time spent in participating in District, UUMA, and UUA events as part of his/her professional responsibilities.
6. To cooperate fully with the Interim Minister in the performance of his/her duties. The Interim Minister shall have freedom of the pulpit, and shall use his/her time as he/she deems necessary for the best fulfillment of this interim ministry.
7. To give the Interim Minister access to all financial and stewardship information.
8. To appoint a Transition Team consisting of five to seven members of the congregation who are well-known, widely respected, and not members or spouses/partners of members on the previous Committee on Ministry or current Governing Board.

### **IT IS FURTHER UNDERSTOOD THAT:**

1. In the event the Interim Minister is incapacitated during the term of this agreement, the Governing Board will continue the above payments for 30 days only if the disability occurs in the first four months of the agreement, and 60 days only if the incapacitating disability occurs thereafter.

2. In the event that the Interim Minister resigns during the contractual period, the s/he will give at least ninety days notice (less if by mutual agreement) and will return any relocation expenses received.

3. Except for the departures specifically noted herein, the expectations of the Interim Minister and the Congregation are those described in Model Letter of Agreement B, Sec. 2 of Joint Recommendations Concerning Ministerial Agreements.

4. List here any modifications to the Interim Minister's office that have been agreed upon:

5. Include here any additional expectations that have been agreed upon:

A signed copy of this contract shall be sent to the Transitions Office, Unitarian Universalist Association, 25 Beacon St., Boston, MA 02108.

This contract represents an official offer to the Interim Minister when her/his hiring is approved by the Governing Board.

For the Governing Board: \_\_\_\_\_  
(signature)

Name and title: \_\_\_\_\_ Date approved: \_\_\_\_\_

Interim Minister: \_\_\_\_\_ Date Accepted: \_\_\_\_\_

## **UUA ACCREDITED INTERIM MINISTRY PROGRAM**

### **REQUIREMENTS FOR ADMISSION AND ACCREDITATION**

#### ***INTRODUCTION***

The objective of the Accredited Interim Ministry Program is to maintain a pool of seasoned ministers with advanced consulting skills whose competence in ministering to congregations in all the complexities of an interim period is proven and who are willing to relocate annually.

Accredited Interim Ministers (AIMs) are ministers who specialize in interim ministry. Accreditation is awarded by the UUA Transitions Office on the basis of proven competence in interim ministry, advanced training, and continuing education.

In recognition of their special competencies, the Transitions Director seeks to list AIMs, and to a lesser extent AIMs-in-Training (AIMITs), for interim positions of their choosing by means of an early preference pool.

#### ***BECOMING AN ACCREDITED INTERIM MINISTER***

##### Requirements for Admission

To be considered for admission to the status of Accredited Interim Minister in Training (AIMIT), a minister must:

1. Generally be in Final Fellowship with the UUA; however, the Transitions Director may admit ministers in preliminary fellowship on the basis of relevant experience, skills, and training
2. Demonstrate competence in worship, preaching, counseling, working with volunteers, and church administration
3. Have completed the Fundamentals of Transitional Ministry and/or Orientation to Interim Ministry
4. Have served effectively as an interim minister for at least one year
5. Exhibit appropriate personal qualities:
  - self-differentiation: personal security, emotional stability, flexibility
  - resilience and resourcefulness
  - comfort with beginnings and endings
  - the ability to listen attentively and to ask searching questions
  - patience, empathy, understanding
  - hopefulness: a positive approach to life
  - physical vitality

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- entrepreneurial energy on behalf of congregations
  - a domestic situation conducive to frequent relocation
  - make required professional commitments
  - to retain an AIM as a mentor, and to engage in regular conversation about interim ministry with the mentor at least monthly
6. Provide evaluations of and by congregations served
  7. Refrain from serving a congregation as its interim minister for longer than two years
  8. Not to become a candidate for the congregation's called ministry until at least three years after completion of service
  9. Not to discuss specific prospective candidates for the called ministry of the congregation with a congregation's ministerial search committee.
  10. Assure that the UUA receives 1.25% of current Salary plus Housing Allowance for each training event and seminar attended, in return for which the UUA will cover the costs of travel, room and board, and program.
  11. Participate in the early preference pool only if not seeking a called ministry
  12. Provide to the Transitions Office a copy of each year's executed interim ministry contract

### ***Procedures for Admission***

Admission, advancement, accreditation, and continuance in the program are administered by the UUA Transitions Director in consultation with the Interim Ministry Guild Steering Committee elected by the body of AIMs and AIMITs. Applications for admission are always welcome.

Admission to the program as an AIMIT is granted on the basis of evidence of a minister's effective interim service, satisfaction of the requirements for admission, and commitment to professional growth through continuing education and through the retention of an AIM as a mentor. Evaluations by the congregation, UUA Field Staff, and minister usually constitute such evidence. The minister is also expected to see that each member of the Steering Committee as well as the Transitions Director get a copy (or e-copy) of the minister's search packet. (Contact Transitions for names and addresses) The Transitions Director will confer the Interim Ministry Guild Steering Committee and may do so with congregational leadership and Field Staff, as well. A minister disagreeing with the Transitions Director's decision may appeal to the entire body of AIMs assembled.

### ***Requirements for Accreditation***

Rigorous standards of accreditation are required by the fact that AIMs are regularly called upon to enter churches in crisis, and to respond, often immediately, to problems that called ministers confront only infrequently.

To earn accreditation as an AIM, an AIMIT must:

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1. Complete two additional years of effective interim ministry (as demonstrated by evaluations completed by the congregation, UUA District Staff, and minister, with such other evidence as the Transitions Director may request)
2. Participate in at least two annual AIM Seminars
3. Complete the “Fundamentals of Transitional Ministry” program of the Interim Ministry Network (if not completed earlier)
4. Complete “The Intentional Minister” program of the Interim Ministry Network or its equivalent, including fieldwork

AIMITs who wish to lay claim to AIM status are asked to submit the following materials to the Transitions Office for consideration by the Transitions Director, the AIMIT’s mentor, and another AIM chosen by the mentor.

### ***Certificates of course completion from the IMN***

Evaluations from the most recent three years of interim ministry— by the minister, the congregation, and District staff

### ***A recent interim ministry search packet***

A detailed statement on how the AIMIT's recent ministries, while conducting the normal responsibilities of ministry, including worship and pastoral care, have demonstrated success in assisting congregations in the following areas:

- Claiming and honoring its past and engaging and honoring its griefs and conflicts
- Recognizing its unique identity and its strengths, needs, and challenges
- Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition
- Making appropriate use of District, UUA, and other outside resources
- Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

### ***UUA Tuition Reimbursement Plan***

The Transitions Office reimburses AIMITs for the cost of tuition for the Interim Ministry Network’s “Fundamentals of Transitional Ministry” and “The Intentional Interim Minister” programs upon receipt of a copy of the Certificate of Completion. Costs for room, board, and travel, if any, are the responsibility of the AIMIT. To arrange payment, contact Margaret Montore at [mmontore@uua.org](mailto:mmontore@uua.org).

### ***Maintenance of Accreditation***

In order to hone their skills and deepen their professional competencies, AIMS are required to attend the annual AIM Seminar at least every second year, and participate actively in a program of

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fellowship, continuing education, reflection, and evaluation and self-evaluation. The cost of the AIM Seminar is 1.25 percent of the interim minister's S&H. AIM Seminars are eligible for the UUA's continuing education reimbursement program administered by the Director of Professional Development.

**INTERIM PROGRESS APPRAISAL**

The progress appraisal forms are now a part of the on-line edition of the Transitional Ministry Handbook. We strongly encourage you to use our online web-form to submit your responses, to use this go to [www.uua.org/interimministry](http://www.uua.org/interimministry). Below is the information that will be requested.

Name of Congregation: \_\_\_\_\_

City and State/Province: \_\_\_\_\_

Name of Interim Minister: \_\_\_\_\_

Date Interim Ministry Began: \_\_\_\_\_ Date of Appraisal: \_\_\_\_\_

This appraisal is by the governing board or its designee

Convener: \_\_\_\_\_

Daytime telephone: \_\_\_\_\_ E-mail \_\_\_\_\_

Were others involved in the appraisal process in addition to the governing board? (e.g. Transition Team) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Brief description of the process: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Note to convener: Please seek to arrive at a consensus appraisal, in which the assessments of the individual appraisers are blended into statements with which all can agree.

by the interim minister       at mid-term or       at the end-of-ministry

Have you shared this appraisal with your partner in leadership? (i.e. has the leadership shared its appraisal with the interim minister and vice-versa)     yes     no

The purpose of this appraisal is to provide a picture of the congregation's progress to date toward its interim goals. The lay leadership and minister are each asked to complete an appraisal independently, to discuss the completed appraisals with one another, and to submit both to the Transitions Office. The Transitions Office will share the appraisals with the District and with the successor ministerial candidate. For the sake of the greatest possible candor, distribution of these appraisals is restricted to those authorized to receive them.

Instructions: In connection with each of the interim tasks, please appraise the congregation's progress to date. Where progress is less than satisfactory, please note the steps to be taken, and by whom, to get up to speed?

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## **1. THE CONGREGATION HAS . . .**

### **A. CLAIMED AND HONORED ITS PAST**

Progress to date:

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

### **B. ENGAGED AND ACKNOWLEDGED ITS GRIEFS AND CONFLICTS.**

Progress to date:

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

## **2. THE CONGREGATION RECOGNIZES ITS UNIQUE IDENTITY AND ITS STRENGTHS, NEEDS, AND CHALLENGES.**

Progress to date:

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

## **3. THE CONGREGATION**

### **A. HAS A CLEAR UNDERSTANDING OF THE APPROPRIATE LEADERSHIP ROLES OF MINISTER(S), CHURCH STAFF, AND LAY LEADERS**

↑ Excellent: developmental task completed

↑ Well on track

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↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

### **B. HAS SUCCESSFULLY NAVIGATED THE SHIFTS IN LEADERSHIP THAT MAY ACCOMPANY TIMES OF TRANSITION.**

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

### **4. THE CONGREGATION MAKES APPROPRIATE USE OF DISTRICT, UUA, AND OTHER OUTSIDE RESOURCES.**

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

### **5. THE CONGREGATION IS IN PROUD POSSESSION OF A RENEWED VISION AND STRONG STEWARDSHIP, PREPARED FOR NEW GROWTH AND NEW PROFESSIONAL LEADERSHIP, READY TO EMBRACE THE FUTURE WITH ANTICIPATION AND ZEST.**

↑ Excellent: developmental task completed

↑ Well on track

↑ Satisfactory

↑ Lagging

↑ Unsatisfactory: serious concern here

Comments: [plenty of space in the online version]

### **5. IS THE INTERIM MINISTER CAPABLY MINISTERING—AS PREACHER, PASTOR, AND TEACHER—TO THE CONGREGATION? HAVE THERE BEEN DIFFICULTIES WITH OR CONSTRAINTS PUT UPON THE MINISTER’S ABILITY TO DO SO?**

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6. HAS THE INTERIM MINISTER BEEN ATTENTIVE TO SELF-CARE AND TO A SPIRITUAL PRACTICE OF CHOICE?
7. IS THE INTERIM MINISTER COURAGEOUSLY RAISING THE NEEDFUL ISSUES IN THE CONGREGATION?
8. IS THE INTERIM MINISTER GAINING THE COOPERATION OF THE CHURCH LEADERSHIP IN ADDRESSING THOSE ISSUES?
9. ARE THERE OTHER AREAS IN WHICH THE LEADERSHIP HAS SPECIFICALLY REQUESTED ASSISTANCE FROM THE INTERIM MINISTER, EITHER AS THE MINISTRY BEGAN OR LATER ON? IF SO, PLEASE DESCRIBE THE REQUESTS AND APPRAISE THE PROGRESS TO DATE ON EACH.
10. . WHAT PROGRESS HAS THE CONGREGATION MADE IN REACHING BEYOND THE DOMINANT CULTURE TO INCLUDE THE MULTICULTURAL WORLD IN SOCIAL SERVICE AND SOCIAL JUSTICE?
11. IN YOUR PERCEPTION, HOW FULLY DID THE LEADERSHIP INFORM THE CONGREGATION ABOUT THE INTERIM MINISTRY PROGRAM BEFORE THE INTERIM MINISTER ARRIVED?
12. PLEASE COMMENT ON THE INTERIM MINISTRY PROGRAM (AS DISTINCT FROM THE INTERIM MINISTER) AS YOU HAVE EXPERIENCED IT SO FAR.
13. ***IF A MID-TERM EVALUATION:*** WHAT WOULD YOU LIKE TO SEE HAPPEN DURING THE REMAINING MONTHS THAT DIFFERS FROM WHAT IS NOW OCCURRING?
14. RECOGNIZING THAT CONGREGATIONAL LEADERSHIP IS IN ITS TRUEST SENSE A SHARED UNDERTAKING, WHAT OTHER SATISFACTIONS AND DISSATISFACTIONS DO YOU, AS MINISTER OR AS LAY LEADERS, HAVE ABOUT YOUR ROLE IN LEADING THE CONGREGATION DURING THE INTERIM PERIOD?