

THE UUMA GUIDELINES FOR THE CONDUCT OF MINISTRY

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A HISTORY OF GUIDELINES AND ITS REVISIONS

The UUMA Guidelines was first adopted in 1965, and represents one of the most thorough codes for the practice of ministry within the congregational church tradition.

Guidelines contains several documents:

- A Preface and Introductory Essay on Ministry.
- A Code of Professional Practice. This is the ethical code of the Unitarian Universalist Ministers Association. According to the bylaws of the UUMA, the Board of Trustees is charged with upholding and enforcing this Code.
- The Guidelines themselves. As implied by the name, the Board of Trustees is not bound by the UUMA bylaws to the same standard of enforcement as with the Code. Frequently Guidelines suggested are for congregations as well as ministers. However, the UUMA takes these Guidelines seriously. Flagrant disregard of the Guidelines by ministers can be cause for censure or other disciplinary action by the Board of Trustees.

The UUMA wants *Guidelines* to be a living document. To that end we have made revisions from time to time. Some revisions have been editorial in nature, correcting errors or making changes for clarity and simplicity. Some changed the tone of *Guidelines* to reflect more strongly concern for the interests of the congregations we serve or to reinforce our individual freedom and responsibility as ministers. And some attempt to alter or reform our understanding and practice of ministry. All but editorial changes have been made at annual meetings of the UUMA.

In June 1985, a broadly ranging set of revisions affected many parts of *Guidelines*. These included more specific affirmation of congregational polity as the foundation of our ministry; use of covenantal language rather than that of labor/management relations to speak of our responsibilities to congregations and vice versa; specific counsel to retired ministers and part-time ministers not to refer to themselves, nor to behave or think of themselves, as ministers of a congregation unless duly called; new acknowledgments of maternity and paternity needs; and the careful choice of gender inclusive language throughout to reflect that ours is a ministry in which women and men serve our congregations truly and fully on an equal basis.

Recent revisions have been narrowly focused. In 1985-87 we responded to the concern of many members that *Guidelines* should speak specifically to the ethics of our behavior as sexual beings in the ministry. Amendments were proposed to the first three sections of our Code of Professional Practice - Self, Colleagues and Congregation. All but one amendment were approved at the Annual Meeting of 1987. The final amendment pertained specifically to the responsibilities of single ministers. It was reconsidered, recast and then approved in June 1988. The Guidelines Revision Committee hoped by offering these amendments that in the process of considering them as well as in their application, we would speak more often and openly with each other about what it means for us to be sexual beings and ministers, the energies involved and the decisions and ethics required.

In the 1988 revision a Canadian Supplement was added, addressing the particular needs of those serving Canadian societies.

In 1990, a Professional Rights Procedure was added to amplify and clarify the procedures involved when UUMA members bring grievances against each other for violating the Code of Professional Practice.

In 1992, amendments and additions to the Code of Professional Practice clarified the responsibilities that ministers who live and practice in the same geographic area have to each other, and the prerogatives due a settled parish-based minister called by the congregation serving that geographic area.

In 1996, additions to the Code of Professional Practice and the Guidelines delineated areas of non-discrimination to include: race, color, sex, sexual orientation, age, disability, or ethnicity. It was amended again in 1998 to include gender expression.

In 2007, following the suggestion of the most recent chapter to review the Guidelines, the Board of Trustees appointed an ad hoc committee to review, redesign and rewrite the entire "Guidelines" document.

In 2008 changes to the Professional Rights Procedure were passed. A timetable and process for a major Guidelines Revision was approved. The document (known as *Guidelines*) was divided into three primary sections: Covenant, Code of Conduct and Standards of Professional Practice.

At the 2009 UUMA Annual Meeting a new Covenant was adopted and a new Code of Conduct was approved for a first year of study.

At the 2010 Annual Meeting the new Code of Conduct was adopted and a new set of Standards of Professional Practice was approved for a first year of study.

At the 2011 Annual Meeting in Charlotte, the new Standards of Professional Practice were approved by the membership. The Guidelines Committee was also asked by members to continue a process that was started at least twenty years ago: Shaping and guiding the UUMA's reflection and conversation regarding ministerial relationships in the ministerial setting. The excellent work done by previous Guidelines Committees bequeathed the Committee a challenging and clear agenda. At the 2012 UUMA meeting in Phoenix, members voted on Guidelines Committee recommendations and committed to a second year of study. The Committee reviewed and discussed chapter and individual feedback and presented recommendations to the 2013 Annual Meeting in Louisville that added to the Code of Conduct these words: "I will not engage in sexual contact, sexualized behavior, or a sexual relationship with any person I serve as a minister." Changes to the "Standards, II, G" were also accepted.

In 2015 a new section of the Standards of Professional Practice, regarding social media and other forums of online ministry, was presented to the membership and put out for a year of study. Feedback led to substantive revisions to the draft language in 2016 and a second year of study. Final wording was adopted by the membership in 2017, creating section V. Social Media and Online Ministry.

In 2018 the membership voted to change the UUMA Bylaws such that the Board of Trustees could propose amendments for immediate adoption to these Guidelines. Upon approval of this bylaw, the Ethical Standards of the Code of Conduct and Section II.G 2 Personal or Romantic

Relationship were amended to bring alignment to the two sections regarding expectations around sexual boundaries.

In 2019 Section I.C.5 of the Standards of Professional Practice was added to reflect the learning nature of the ministry and coincided a UUA bylaw revision changing the language from Final Fellowship to Full Fellowship. The following articles of section I.C were renumbered to reflect this addition.

In 2020, the Annual Meeting voted to adopt revisions to the Code of Conduct and Standards of Professional Practice presented by the Ethics and Accountability Guidelines Committees. The Ethics committee was charged with eliminating gaps and inconsistencies in our ethical standards and clarifying and strengthening our standards against behaviors that perpetuate white supremacy, hetero-patriarchy, and other systems and structures of oppression. The Accountability Committee was charged with developing a clear, transparent, and accessible process of accountability and restoration for colleagues who have a covenantal breach with another colleague or colleagues.

In all of this the UUMA has tried carefully to respond to the needs and concerns of its members in order to reflect in Guidelines the best insights and wisdom for an effective and successful ministry.

07/20

COVENANT

United in our call to serve the spirit of love and justice through the vocation of ministry in the liberal religious tradition, we, the members of the Unitarian Universalist Ministers Association, covenant with one another:

- To conduct ourselves with integrity, honoring the trust placed in us;
- To embody in our lives the values that we proclaim on behalf of our faith;
- To support one another in collegial respect and care, understanding and honoring the diversity within our association;
- To hold ourselves accountable to each other for the competent exercise of our vocation;
- To use our power constructively and with intention, mindful of our potential unconsciously to perpetuate systems of oppression;
- To seek justice and right relations according to our evolving collective wisdom, and to refrain from all abuse or exploitation;
- To cultivate practices of deepening awareness, understanding, humility, and commitment to our ideals;
- To labor earnestly together for the well being of our communities and the progress of Unitarian Universalism.

We recognize that none of us is perfect and all are works in progress. We hold one another in love as, through fidelity to this covenant and our Code of Professional Conduct, we aspire to grow in wholeness, and bring hope and healing to the world.

07/20

CODE OF CONDUCT

Ethical Standards

1. I will be honest and diligent in my work to fulfill the offices of ministry according to the stipulations of my call or employment and my best professional judgment.
2. I will not misappropriate the money or property of the congregations, agencies or enterprises I serve, or of their members, staff or clients.
3. Within the limitations of the law and the policies of the setting in which I serve, I will respect confidential communications.
4. I will honor the intellectual property of others, assuring that appropriate attribution is given to avoid intentionally creating the impression that the work of others is my own.
5. I will not engage in racist or oppressive actions or speech. I will demonstrate respect, compassion and equitable treatment to everyone both within and outside of my ministerial context, including clergy colleagues, staff, those I serve and anyone who may disagree with me.
6. I will work to understand, identify, and eliminate unjust discrimination—including tokenism—based on racialized identity, ethnicity, size, gender expression, gender identity, sex, disability, affectional or sexual orientation, family and relationship structures, age, language, citizenship status, economic status, national origin, or religion. This includes challenging injustice in myself, in ministerial and other professional colleagues, those I serve in ministry, institutions, and in the wider world. Refer to the Addendum for a description of tokenism.
7. I will publicly and privately act with respect toward staff colleagues. Such behavior includes sharing of pertinent information and insights, providing programmatic support, honoring their professional abilities, respecting confidences, and giving public support although not necessarily agreement.
8. I will refrain from relating to colleagues, staff, and members of the congregation or constituents of the setting in which I serve in a manner that creates an intimidating, hostile or oppressive environment. I will not engage in bullying behavior or emotional abuse, further defined in the Addendum of these Guidelines. I will not intentionally deceive colleagues, staff, congregants or constituents in any setting.
9. I will not take advantage of those I serve, or damage the integrity of any congregation, agency, or enterprise in which I serve. I will not use those I serve to meet my own romantic or sexual needs or personal emotional needs that should be met through family, friends, therapy, self-care or in other ways.
10. I will not engage in sexual contact, sexual harassment, sexualized behavior or a sexual relationship with any person I serve as a minister.
11. I will not engage in sexual contact, sexual harassment, sexualized behavior or sexual relationships with colleagues who are interns, associates, students, counselees, mentees,

or others – whether ministers or other religious professionals – under my direct or indirect supervision, or with any other colleagues serving in or affiliated with the same congregation. Colleagues serving in the same setting who were already partnered at the start of the ministry may continue those relationships.

12. I will make myself a candidate for a pulpit or other position of ministry only with serious intent, and I will observe the established candidating procedures of the Unitarian Universalist Association.
13. I will not engage in words or actions that degrade the vocation of ministry, or diminish among us the esteem of our calling.
14. I will stay informed of the latest rules and policies of the UUA's Ministerial Fellowship Committee.

Expectations of Conduct

1. I will share and support the concerns of the Unitarian Universalist Ministers Association, especially as reflected in the UUMA Covenant, Code and Standards.
2. Within the limitations of law, I will respect confidences given me by colleagues and expect them to respect mine.
3. When speaking to or about a colleague in any venue or media, public or private, I will do so respectfully. There are times when it is necessary in the service of the greater good to name a colleague's problematic behavior, whether related to misconduct, malpractice or incompetence. In naming such behavior, I will speak honestly but not unkindly, and I will use descriptive rather than judgmental language. This means I will describe the behavior and its impact, and not engage in name-calling.

I accept a proactive obligation to address behavior in violation of this code of conduct, especially when not addressing it might allow additional harm to occur. If I was harmed directly by the colleague, I know that I can prioritize my own self-care. If I feel able to speak directly to the colleague with whom I have concerns, I will do so. If I do not feel able to address the colleague directly, I will contact a Good Offices Person (GOP) to create a process for addressing the concern.

The importance of identifying and addressing ministerial misconduct (as defined in this Code) and the resulting harm to individuals, colleagues, congregations, and agencies or enterprises, takes priority over expectations of collegial confidentiality.

4. These Expectations of Conduct apply to all forms of public or private media including electronic and internet communications.
5. I will seek consultation among my colleagues practicing the diverse forms of parish-based and community-based ministry within the same geographical area, so that we may develop a mutually agreed Letter of Understanding regarding our several roles and the ways in which these may and may not intersect.

6. If I am not a settled, interim or consulting minister of a congregation served by a colleague, I will not offer, and will not accept requests for, ministerial services or public leadership from members of that congregation, or in that congregational context, unless I have a covenant with or until I have consulted with the minister serving there.
7. If my colleague asks me to refrain from performing such service or appearing in a leadership capacity, I will comply.
8. Should emergency circumstances make advance consultation impossible, I will render only limited service, and consult with my colleague at the earliest possible opportunity.
9. If I have occasion to perform ministerial or leadership functions, apart from routine contact with members or clients of my current ministry, in contexts where colleagues are serving, I will make an effort to communicate with those colleagues, and to respect their professional prerogatives and be responsive to their concerns.
10. Ministers of a congregation hosting District/Regional or UUA events will be assumed to have invited colleagues to appear in leadership capacities at such events.
11. If I am to share the ministry of a congregation with other ministers, I will seek clear delineation of responsibility, authority, accountability and channels of communication before responsibilities are assumed. I will thereafter work in cooperation and consultation with my colleagues, taking care that changing roles and relations are re-negotiated with clarity, respect and honesty.
12. I will acknowledge the reality of power differences based on defined responsibilities and authority within congregations, agencies or enterprises. I will acknowledge the reality of privilege arising from differences of social location and historical marginalization. I will exercise the power of my authority and the privileges of my social location in such a way that I do not disadvantage my colleagues on the basis of my or their racialized identity, ethnicity, size, gender expression, gender identity, sex, disability, affectional or sexual orientation, family and relationship structures, age, language, citizenship status, economic status, or national origin.
13. As a supervisor, I will recognize the special responsibility I have to colleagues and staff who I supervise, and I will work justly and compassionately with the authority given to me.
14. As a minister working with other clergy colleagues in the same setting, I will work to support my colleagues' leadership and the success of our shared ministry.
15. When my ministry to a congregation has ended, I will refrain from offering or performing ministerial services for members of that congregation, except at the invitation of my incumbent successor colleague(s).
16. If I belong to or attend a congregation served by a colleague, I will honor the prerogatives of that colleague's responsibility for leadership in that congregation, and in all ways seek to support that colleague's ministry. I will initiate an open and direct conversation with my colleague(s) in order to create a mutually agreed covenant, expressed in a Letter of Understanding, about the role I am to play in the church. If I have

a partner, I will seek to have my partner participate in the conversation and be one of the mutually agreeing parties to the covenant and a signer of the Letter of Understanding about the roles each of us will play in the church. If I am a member of a congregation that I once served, this may include the possibility of absenting myself from any presence at all. I will articulate clearly my own hopes and expectations regarding my relationships in the congregation, and my intention to avoid wielding any undue influence among the members. I will only participate in leadership roles that support and benefit the ministry, and at the request and with the permission of the minister(s). I will neither listen to nor volunteer criticisms of my colleague(s). As necessary I will describe appropriate channels of communications to members seeking to express concerns.

17. If I am a settled minister in a congregation having retired or other ministers as members, I will seek to foster cordial and candid relations with my colleagues in recognition of the value of their presence in the congregation. I will initiate an open and direct conversation with my colleague(s) to enter a mutually agreed covenant, expressed in a Letter of Understanding, about their participation in the life of the congregation. I will bring any concerns arising from the relationship my colleague(s) have with the congregation directly and promptly to the attention of my colleague(s).
18. If I am elected Minister Emerita/us/x, I will recognize that this honor sustains a continuing but changed relationship with the congregation I once served as one of its ministers. I will initiate an open and direct conversation with my successor colleague(s) to enter a mutually agreed covenant, expressed in a Letter of Understanding, about the role I am to play in the church. My successor colleague may choose to include the congregation's board of trustees in this covenant process. I will honor the prerogatives of my colleague's responsibility for leadership, and in all ways seek to support that colleague's ministry.
19. If I am a settled minister in a congregation that has elected a Minister Emerita/us/x, I will recognize the meaning of the honor that the congregation has bestowed, and the significance of the continuing relationship of ministry it implies. I will initiate an open and direct conversation with my Emeritus/a colleague(s) to enter a mutually agreed covenant, expressed in a Letter of Understanding, about their participation in the life of the congregation. I will bring any concerns arising from the relationship the Minister Emerita/us/x has with the congregation directly and promptly to that colleague's attention.
20. In calling attention to any deviation by my colleague(s) from this Code, I will adhere to the processes described in Accountability Procedures, below. So doing will not be regarded as a failure of collegial loyalty.

Accountability Procedures

1. All members of the UUMA are in covenant together. Our systems of accountability strive to restore this covenant when it is broken, to protect the integrity of this covenant, promote public safety, and work toward healing the person(s) who is harmed. Our core values in this system of accountability are justice, integrity, and healing.
2. In all efforts at remedy, differences in power and privilege should be faithfully considered and accounted for. Some ways to consider and account for these differences include: counter-oppressive best practices; systemic and not overly individualistic analysis; concern for public safety; knowing how differences in role, authority, and social location inform our ethical responsibilities; culturally competent understandings of identity, history, harm, and healing; centering the experiences of marginalized people; and genuine openness to learning and growth.
3. A violation of our code of conduct damages the covenant among us and the health of our vocations. If a member notices that our code of conduct is violated, an attempt to restore the covenantal relationship is usually appropriate. It is possible for colleagues to resolve concerns amongst us without these specific procedures, and they are welcome to do so.
4. If, however, a party who is identified as breaching the covenant is unwilling to participate in the restoration of covenant, they cannot be considered a member. In such cases, the Good Officer with the appropriate specialty will consult with the designated member of the Executive Team and the Board Member with the portfolio for Ethics and Collegiality. If the three of them agree, they may recommend to the UUMA Board that their membership be suspended. If the board concurs, they will suspend their membership unless and until participation in remedies happens, notify the members of the UUMA of the suspension, and report the suspended member to the UUA Office of Ethics and Safety for review of their fellowship as a minister. A member of the UUMA who resigns their membership rather than participate in accountability and restoration must be reported to the UUA Office of Ethics and Safety, and the membership at large must be informed that they have resigned in order to avoid responsibility for their actions.¹
5. When the violation of the covenant is egregious misconduct² which makes returning to our covenant untenable, the person directly impacted by this misconduct should report the matter to the UUA Office of Ethics and Safety and to the UUMA Accountability Coordinator(s).³ Though, under their current rules, only the person directly impacted can make a referral to the MFC, any

¹ See, [click here for example](#), on how this can be done. This Rabbinical body is clear that “resigned during the pendency of suspension, is itself a violation of the Ethics Code.”

² Egregious Misconduct, which is a more narrow subset of violations of our code, means violations of the UUMA Code related to the misappropriation of money or property (paragraph 2), sexual harassment (paragraph 10) sexual behavior with those we serve (paragraph 11), and sexual behavior with colleagues under our direct or indirect supervision (paragraph 12). Other violations of the code, including plagiarism (paragraph 4), racist or oppressive behavior (paragraph 5b), and relating to colleagues and staff in a manner that creates a hostile environment (paragraph 5e), can become egregious misconduct if they are willful, repeated, and continue after interventions.

³ The UUMA Accountability Coordinator(s) is/are the UUMA Staff Members, Executive Team Member, and/or Board Member that is designated by the UUMA Board to oversee, manage, and support accountability processes. The Board shall communicate clearly who these persons, or person, are/is to the membership.

member of the UUMA (a survivor, a witness, a Good Officer, etc) can refer the matter to the UUMA Board (through the UUMA Accountability Coordinator(s)). The UUMA Board may suspend the membership of a referred member while the Ministerial Fellowship Committee investigates the misconduct. If the Committee recommends, after an investigation, that covenant can and should be restored, the below processes may be used to do so.

6. When an attempt at repairing and restoring the covenant is advisable, the person(s) who was harmed by a violation of the code of conduct will have the primary but not exclusive right to shape the process.⁴

7. Here is how covenant may be restored, renewed, or repaired:

- A. When a member of the UUMA is harmed by a violation of our code of conduct by another member of the UUMA, they should contact a Good Officer with the appropriate specialty.⁵ They can contact any of these officers listed by the UUMA. The Good Officer will discuss the issue with the member, be a support/coach to the member, and help the member decide how to proceed. The Good Officer with the appropriate specialty will be trained in trauma-informed care, ARAOMC⁶, and be prepared to guide the member through how and where to report, seek redress, and find healing. The Good Officer with appropriate specialty will file a simple report of the contact with the UUMA Executive Team.⁷ If the member declines to proceed the report must so note and acknowledge that in the future the member may reverse this decision and choose to proceed.
- B. A minister who has been identified as breaking covenant (including if they themselves realize they have erred) may contact a Good Officer with Right Relations specialty to assist them in restoring covenant. A minister who so requests will be provided coaching to repair a breach, especially but not only involving power and/or identity, and thus reduce the risk of re-traumatizing another member.⁸
- C. Sometimes, the Good Officer with appropriate specialty will find that no real violation of our code has happened and can help the member understand the code more fully and/or provide a more pastoral response. A member can ask the UUMA Accountability

⁴ Sometimes the question of “who was harmed by the violation” is unclear, or more than one person has acted contrary to our code. The Good Officer with right relations specialty will need to be responsive to these situations and aware that more than one party may need to both make repair and find healing.

⁵ A publicly available handbook for Good Officers with this specialty should be created by the UUMA Executive Team and approved, after a period of public comment, by the UUMA Board, before these changes to our process are fully implemented.

⁶ Anti-Racist, Anti-Oppressive, and MultiCultural analysis and policies acknowledge and address the intersection and imbalance of power given our social location and social identities. A commitment to ARAOMC work will address these imbalances and work for equity and justice for all.

⁷ A simple report is distinct from a referral for action. The simple reports can be reviewed for patterns, but do not require a full inquiry in all cases. The UUMA Executive Team will create procedures for this, including if and how a member can consult with a GO without a notation being recorded.

⁸ The member who experienced the violation of our code may require that the other member seek counsel from a GO before a healing conversation is attempted, in order to reduce the potential for continued harm through a clumsy apology.

Coordinator(s) to review the decision that the code has not be violated, and that person may in turn may ask the Good Officer, or another, to proceed with remedies, or may affirm the decision. The Coordinator(s) and Good Officer should lean toward remedy. If a minister who has been identified as violating the code believes that, in fact, no violation of the covenant has occurred, they are nonetheless well served by participating in the process to clear up misunderstandings and move toward healing. Rights for a member to appeal a finding are included in the remedies themselves, listed below.

8. In collaboration, the affected minister(s) and the Good Officer with the appropriate specialty may do one or more of the following things. In most cases, either the minister(s) or the Good Officer with the appropriate specialty may make contact as appropriate. If any approach fails to restore covenant, other approaches should be used. This list begins with urgent solutions – to stop the violation (A), and report misconduct (B) – but then proceeds, from paragraph C to H, from more gentle remedies towards more formal and structured interventions.⁹ Choosing which remedies to use depends on the type of violation of our code, the particular relationship between the parties, questions of identity and more. There is no one-size-fits-all solution.

A. Stop the Violation. The Good Officer with the appropriate specialty may instruct another minister to stop the violation of the code of conduct, including to cease a behavior and/or to refrain from any communication with another member immediately, pending steps at repair outlined below. This instruction must be followed. A failure to follow this instruction constitutes egregious misconduct and necessitates a report to the UUA Office of Ethics and Safety. In some cases, if an instruction to stop the harm is not followed, the Good Officer with the appropriate specialty may request the UUMA Accountability Coordinator(s) to contact, directly, and/or through UUA or CUC Congregational Life staff, the chair of the governing board of the ministry setting and request immediate action to intervene. The minister who is thus instructed may appeal, in writing, this instruction to the UUMA Accountability Coordinator(s), who may affirm, amend, or overturn the instruction, or remand the matter back to the Good Officer with the appropriate specialty.

B. Contact the staff of the UUA Office of Ethics and Safety. Under their current rules, only the person directly impacted by the violation can do this, but the Good Officer with the appropriate specialty or minister(s) can coach the person on how to do so. This should always be done if any concern of misconduct, abuse, or legal violation has occurred or may have occurred — whether that misconduct or abuse is against a minister or not.¹⁰

⁹ Eventually, these possible remedies may be moved from this document and placed in the Good Officer manual.

¹⁰ Misconduct, abuse, or legal violations means violations of the UUMA Code related to the misappropriation of money or property (paragraph 2), sexual harassment (paragraph 10) sexual behavior with those we serve (paragraph 11), and sexual behavior with colleagues under our direct or indirect supervision (paragraph 12). Other violations of the code, including plagiarism (paragraph 4), racist or oppressive behavior (paragraph 5b), and relating to colleagues and staff in a manner that creates a hostile environment (paragraph 5e), can become misconduct if they are willful, repeated, and continue after interventions.

C. The minister who has experienced the break may speak directly with the minister(s) involved in the breach of covenant. This is optional, but never required. The Good Officer with the appropriate specialty might coach or support the member to plan this conversation in advance.

D. Engage in a restorative justice circle. A circle should be led by someone trained in restorative justice work¹¹, and all parties¹² must voluntarily participate for this option to be used. If any party declines to be part of a circle, this option is not available, and others should be used. The outcome of the circle must be reviewed by the Good Officer with the appropriate specialty. If mutually agreed to by all parties, the outcome may be affirmed by the Good Officer with the appropriate specialty as binding.

E. Engage in a mediation session. The affected minister(s), their Good Officer with the appropriate specialty, and the minister(s) identified as breaking the covenant (and their Good Officer or Accountability Colleague¹³, if they have one) may gather to mediate the concern(s). They should select an independent credentialed mediator.¹⁴ The outcome of the mediation must be reviewed by the Good Officer with right relations specialty. If mutually agreed to by all parties, the outcome may be affirmed by the Good Officer as binding.

F. Contact the UUA or CUC Congregational Life staff if the harm affects congregations or covenanted communities or is from the congregation, community, or its members against the minister.¹⁵ Congregational Life staff are charged and equipped to companion a congregation or covenanted community in healing and repair. It is highly likely that a breach of our covenant will affect congregations and covenanted communities, and this step should almost always be done.¹⁶

G. Contact the minister's supervisor, governing board chair, or other body if appropriate, as necessary for healing, the integrity of our ministry, or for the safety of others. The

¹¹ The UUMA should publish a list of members trained in Restorative Justice Circles.

¹² "All parties" may include other staff members, lay leaders in a congregation or covenanted community, and others. Violations and their remedies are often systemic.

¹³ Accountability-buddy. These persons, often informal, are a key part of shifting our culture. They are usually someone in a similar social location, but who has done more work on cultural competency, power, and healing justice.

¹⁴ Costs for Mediation may be paid by the restoration practices fund.

¹⁵ In future revisions, we expect to clarify what additional guidance may be offered in the guidelines when processes ultimately reveal that ministers have been wrongly accused of misconduct by members of congregations.

¹⁶ UUA or CUC staff who are also members of the UUMA are expected to abide by the UUMA code of conduct. However, the unique nature of their role, especially for Congregational Life staff, will sometimes require differences in approach. UUA and CUC staff are subject to the accountability policies of the UUA and CUC, respectively, and concerns about their actions with respect to the UUMA code should be raised in accordance with the associations' personnel policies before employing these UUMA procedures.

Good Officer with the appropriate specialty, and, in some cases, Congregational Life Staff, must assist in determining how and if to make this contact.¹⁷

H. If the affected minister(s), in consultation with their Good Officer(s) with the appropriate specialty, believes that the restoration or integrity of the covenant demands a letter of reprimand, suspension, or termination of membership in the UUMA and/or removal or suspension of fellowship as a minister, they may refer the matter to the UUMA Board and the UUA Office of Ethics and Safety. The Board's recommendations, remedies, and decisions are binding on the UUMA and its members.

9. The outcome of these interventions may include a requirement for continuing education, counseling, a behavioral covenant, a mental and/or cognitive health assessment, addiction treatment, caucusing with or connecting with similarly situated members, or other forms of remedy. In all cases, the Good Officer with the appropriate specialty must provide a report of the remedy to UUMA Accountability Coordinator(s).

10. The Good Officer with the appropriate specialty may recommend and refer to healing processes (including mediation costs, therapy, restorative practices, paid leave, cash compensation, health care, or more) for any harmed by the broken covenant. Existing UUMA and UUA programs, and other sources, can be aligned to facilitate and support these practices.

11. Procedures must be established to notify chapter and cluster leaders, the membership of the UUMA, and others, as appropriate, of breaches and repair of covenant, guided by instructions from the person(s) harmed by the violation of our code. The value of healing and public safety must take precedence over secrecy in the creation and implementation of these policies. In all cases, a minister, before accepting a contract or letter of agreement to serve an institution, should request from UUMA Accountability Coordinator(s) a summary of any known violations by ministers who have served that institution. Names of those harmed may be redacted, if so requested by those harmed, from these reports.

12. The Good Officers with the appropriate specialty may, as necessary, propose amendments to the documents that address our covenant of the UUMA to add clarity or correct items related to the covenant. The Good Officers with appropriate specialty must provide reports and feedback that help us learn, as a body, to grow in our anti-oppressive, collegial, and professional work. Sometimes the remedy is systemic not only individual -- and we must be a learning body and a learning people. As part of a learning, iterative process, the Good Officers with appropriate specialty, the Executive Team, and the UUMA Board must, annually at minimum, review reports, patterns, learnings, healing practices offered, and remedies.

13. The restoration of our covenant is a collegial process not a legal one. Using legal counsel, insurance agents, or similar outside bodies to prevent repair or frustrate accountability is itself a

¹⁷ When the breach of covenant has occurred among ministers who serve in the same setting, particular thoughtfulness is required. There are appropriate exercises of authority, and inappropriate ones. Our code of conduct should be supplemented by a clear covenant among colleagues serving in the same setting.

violation of this code.¹⁸ If a member employs these tactics to avoid accountability and healing the Good Officer with the appropriate specialty may refer the matter to the UUA Office of Ethics and Safety and the UUMA Board for review and appropriate action, which may include removal or suspension from membership and/or fellowship.

14. The Good Officer with appropriate specialty and the UUMA Board have a responsibility, and reserve the right, to make known the outcome or remedy of any and all covenantal or collegial matters when they deem doing so serves the UUMA covenant, secures public safety and supports the healing of harm done to individuals, congregations, covenanted communities, and institutions by members' breaches of the covenant. The UUMA Board and Executive Team¹⁹, and may not agree, under any circumstances, to not report the remedy of violation to those violated or to successor colleagues in that setting.

07/2020

STANDARDS OF PROFESSIONAL PRACTICE

I. Ministers' Expectations of Ministers

A. Ordination

To seek and to accept ordination to the Unitarian Universalist ministry is to dedicate oneself to the redemptive power of religious community in the world as expressed in the unique heritage of the liberal faith. A minister makes a vocational commitment to this work in a variety of institutional and relational forms.

B. Congregational Polity

Members of a Unitarian Universalist congregation have freely gathered to become a body of people walking together in religious community. Congregational polity is central to the life of these communities. From honored principle, in practice each local congregation is ultimately and finally self-governing in its institutional authority, as well as pledged to cooperation and consultation with other member congregations of the Unitarian Universalist Association.

C. Call

By the corporate act of call, the members of the local congregation acknowledge their need for the service of one prepared by education and personal commitment for the work of ministerial leadership. They pledge to labor with the minister in bringing to fruition the promise of the free church, and to provide for their sustenance. In the context of both congregational and community-based ministry, the ministerial call signifies creation of a distinctive partnership in which minister and congregation alike affirm their intention to share in a religious pilgrimage of mutual care, joy, forbearance, self-discipline, and a desire to serve the common good.

¹⁸ If outside assistance is necessary, mediation (8E) is the proper pathway.

¹⁹ We cannot set rules for the MFC, but we urge them to follow this principle as well.

1. The minister's life and vocation is to reflect honesty, forthright love, leadership, and service.
2. Ministers are responsible to lead public worship, nurture spiritual growth, and cultivate strong communities.
3. Ministers are to offer counsel and comfort, and help people connect in order to encourage and support one another. Ministers must be clear on the limits of their counseling skills and make referrals when there is need for more than pastoral counseling unless they have specialized training.
4. In keeping with the tradition of intellectual freedom in the pulpit and the pew, ministers are to preach and teach the truth as they see it without fear, and with openness to new understanding.
5. Ministers are to show respect and compassion for all people, and to summon communities to display to the world actions of justice, peace, goodwill, and the ethical life.
6. The minister is to bear witness to the realities of the world, the ideals of the common good, and the power of people for love and change, endurance and delight.
7. In a parish setting, ministers are responsible for assessing the needs and resources of congregations in the many dimensions of community life, such as:
 - a. worship;
 - b. preaching;
 - c. administration;
 - d. pastoral care and counseling;
 - e. rites of passage;
 - f. religious education (adults and children);
 - g. arts and aesthetics;
 - h. small group ministry;
 - i. theological reflection;
 - j. social witness, concern, and action;
 - k. connections in the local community;
 - l. outreach and growth;
 - m. right relationships and community building;
 - n. District and UUA affairs.
8. The relationship of a congregation with its minister(s) can only be understood with reference to both the autonomy and the mutual accountability of congregational polity. Therefore there can be no rigid standardization of parish-minister relations. The conduct of a particular ministry must be determined by the minister, the congregation, and/or other employing agencies or enterprises, in accordance with particular talents and needs.
9. The UUMA Code of Professional Practice and these Standards describe some disciplines important to congregational polity, and to a professional ministry dedicated to serving congregations, agencies or enterprises and larger communities well. They are designed to facilitate understanding and discussion between congregation or agency and

minister, as well as among ministerial colleagues. They represent the best thinking of the UUMA with regard to optimal agreements and conditions, to be adapted by and for each setting of ministry.

10. Effective ministry and collegiality are grounded in mutual trust and respect, rather than in even the best and most scrupulously observed procedures. Adequate and actively used means of communication must be a matter of shared and continuing concern for ministers, congregations and agencies, and among ministerial colleagues.

11. The health and future of the ministry requires the capacity of all ministers to recognize and confront exploitive or destructive patterns of behavior in self and others. Collegiality includes a requirement to raise, and to receive in good faith, concerns about actions and patterns of interactions that damage ministerial integrity or effectiveness. Pursuit of such concerns is not a violation of collegiality, but a duty that is part of its very essence. Appropriate methods for this kind of collegial confrontation and support are outlined in the Code of Conduct section titled "Accountability Procedures" and include the work of the Committee on Ethics and Collegiality.

12. This document will be revised from time to time. Ministers should be attentive to these revisions as published by the UUMA. The entire document should be reviewed periodically by a minister and the appropriate congregation, agency or enterprise.

II. Ministers' Expectations of Institutions They Serve

A. Structure

While the work of ministry is often challenging, it should be structured in such a way as to be sustainable over time, and model health, integrity and wholeness. It is in the interest of the ministry as a whole and the future of the Association that ministers be provided with ample compensation and benefits, and good working conditions, as specified below. The UUMA urges its members not to accept substandard compensation, benefits or working conditions.

B. Right Relations

The Board of Trustees of the UUMA may find a congregation or other agency to be in patent violation of right relations with a minister as described in these Guidelines, and make that finding public.

C. Freedom of the Pulpit and the Ministry

1. The history and expectation of the Unitarian Universalist movement is that ministers are free to speak the truth as they understand it. The long standing tradition of freedom of the pulpit extends to ministers in all professional settings. This freedom applies to both spoken and written public statements.

2. The minister does not, however, necessarily speak for either the institution or its members. It is the minister's responsibility to do everything possible to make clear when the minister is speaking as an individual.

3. The pulpit carries institutional power and credibility that should not be lightly dismissed. Ministers should maintain a clear understanding with congregational leadership concerning the locus of authority over the conduct of worship and pulpit

presentations. Where the minister is solely charged with that responsibility they should hold authority over how all services are structured and how the pulpit is filled. A minister with shared responsibility for pulpit and worship should maintain an advisory relationship with those responsible for that work in the minister's absence.

D. Privacy

1. Like any other person, the minister has a need for a personal and private life. Privacy needs are not identical for any two ministers, nor for one minister at different life stages.
2. The ways in which ministers and their families conduct their private lives, choose their friends, spend their money, rear their children and express their sexuality are private concerns. However, there is a public facet to the minister's life. Perceptions of the public will have a bearing on the effectiveness of the ministry and therefore implications for private choices.
3. The minister's days off and vacation should be regarded as time for personal use, except when an emergency requires the minister's immediate attention. Meetings in which the minister is expected to participate should not be scheduled for the minister's time off.
4. The nature of congregational ministry makes the assurance of privacy particularly difficult. Since the health and happiness of the minister and the minister's family should be of concern to the congregation, the congregation has an obligation to help protect their privacy. Congregations can do this only when ministers make their specific needs and desires known. Expression in these matters is especially important upon arrival a new ministry. Otherwise the congregation may automatically adopt the patterns of the last minister/congregation relationship.
5. Whether a minister lives in a parsonage, or not, their home must be considered a private residence. It is not an extension of the parish for use by congregational groups for institutional functions, except at the specific invitation of the minister and their family.

E. Family Life

1. Ministers should expect their spouse or partner and children to be regarded and treated as individuals separate from the work of ministry. At the same time family members may be well advised to refrain from positions of visible leadership or systemic influence.
2. Members of the minister's family should be allowed to participate in congregational activities free from expectation or coercion, according to talent or interest. This might mean, in some cases, not at all.
3. If the minister's spouse or partner participates in the congregation in such a way as to use professional or employable skills (e.g., as RE Administrator), the spouse or partner should have a separate contract and be compensated accordingly.

F. Support for Family Life

1. Parental Leave:
 - a. A provision of parental leave should be considered when the minister's Letter of Agreement is composed. At least six weeks of paid leave should be provided

for either parent at the birth or adoption of a child, with salary and all other benefits continuing during this time.

b. Ministers and congregations should be prepared to negotiate with flexibility the details of this leave, including reduced duties, part time work, or longer absence depending on the particular circumstances. Ministers may negotiate to use sabbatical, vacation, or sick leave to extend their parental leave. Ministers may arrange for congregations to avail themselves of extended internships, temporary or consulting ministries, or assistance from the UUMA Chapter or other local ministers during the minister's absence. Ministers may help to establish a special committee to facilitate the minister's absence or reduced duties before or after the arrival of a child.

c. A minister should advise the Board of Trustees, the Committee on Ministry, and others in leadership as soon as it is known that a child is to be added to the family and the minister intends to take parental leave.

d. Ministers must take primary responsibility for educating the congregation about plans for changes in their routines resulting from increased parental responsibilities.

2. Adoption should be handled on the same basis as childbirth for the purposes of parental leave.

3. Medical complications during pregnancy or following birth should be handled according to the policy which applies to other medical disabilities.

4. To the extent that a congregation expects the minister who is a parent of a young child/ren to attend events such as the UUA General Assembly that require travel away from home, the cost of child care during these events should be considered part of reimbursable professional expenses.

5. Ministers should be able to arrange for up to 12 weeks of unpaid leave in order to respond to illness or other disability of their spouse or partner, parent, child, sibling, or member of their immediate household. The minister should communicate with congregational leadership, and to the extent possible take an active role in arranging for the needs of the congregation to be met during this time.

6. At least 7 days of paid bereavement leave should be provided to a minister upon the death of their spouse or partner, parent, child, sibling, or member of their immediate household. If additional time is required before actively resuming ministerial duties, the minister should communicate with their employer or congregational leadership to seek flexibility in arranging that the needs of the institution be met.

G. Personal or Romantic Relationships

Recognizing that ministers are called to nourish the health and wholeness of the communities they serve, and recognizing the fiduciary nature of our profession, and as stated in our actionable Code of Conduct, ministers will not engage in sexual contact, sexualized behavior, or a sexual relationship with any person they serve as a minister. The following are non-actionable best practices drawn from the wisdom of much research across many

religious organizations about what behaviors uphold healthy religious communities and ministries. In the spirit not of legalism but of deepening our understanding of loving, just, healthy relationships, these guidelines point towards truths about the profession of ministry and healthy ministerial conduct, understanding that no truth names the whole truth or covers every situation. To that end, ministers should engage in discerning dialogue with themselves and with their colleagues—to better understand what these best practices mean in the context of each ministers’ own ministerial setting and in the context of the collective ministry we all share.

1. Ministers will conduct their behavior concerning romantic relationships in accordance with laws on ministerial misconduct.
2. Ministers will not engage in sexual contact, sexualized behavior or a sexual relationship with any person they serve as a minister.

In addition, ministers will not engage in sexual contact, sexualized behavior or a sexual relationship with any person they have previously served* as a minister, because of the potential for harm to the ministry setting and the person previously served. If a minister engages in conduct contrary to this expectation or claims that an exception is warranted because of extraordinary circumstances, it is the minister—not the person previously served—who assumes the full burden of demonstrating that the person previously served has not been exploited, coerced, or manipulated, intentionally or unintentionally.

Relevant questions include:

- What was the nature/intensity of the relationship with the person previously served?
- How much time has passed?
- Did the minister and the person previously served discuss the appropriateness of the relationship with a Good Offices Person or other trained professional before initiating the relationship?
- What steps were taken to prevent or mitigate potential damage to the relevant ministry site and the person previously served?

*Refer to the Addendum for a definition of who is “served” by a minister.

3. Ministers will refrain from asking communities they serve to accept a succession of exploratory romantic relationships on the part of the minister.
4. All ministers are guided additionally by the expectations of the agencies or enterprises where they work, and by the standards of other professional organizations to which they may belong, regarding sexual contact, sexualized behavior, or a sexual relationship with any person served professionally or any colleagues serving in the same setting.
5. Ministers who would like to initiate a romantic or sexual relationship with a ministerial colleague must be mindful of power differentials in the relationship and always act in ways that protect the well-being and dignity of the colleague who is more vulnerable. Ministers shall not be in sexual relationships with colleagues who are interns, associates, students, counselees, mentees, or others under their direct or indirect supervision.

H. Pledging

1. It is essential that if expectations for congregational pledging or agency fundraising exist, they be stated and clarified during the candidating process, since these expectations will necessarily be part of the minister's financial consideration.
 - a. Some ministers pledge to give as much as do people in similar circumstances.
 - b. Other ministers, perceiving their role to be that of a "lead giver," choose to make pace-setting gifts.
 - c. Some choose to pledge to the UUA or its affiliates instead.
 - d. Others see themselves as contributing in other ways, such as working for a substantially lower salary than could be earned in secular work.
 - e. Some ministers choose not to pledge at all.
2. Unless it is otherwise agreed, the minister's contribution is to be handled with the same confidentiality as that of other people.

I. Committees on Ministry and Ministerial Relations Committees

1. A Ministerial Relations Committee serves as support and counsel to a minister, and as a communication channel between the minister and the congregation or agency.
2. A Committee on Ministry pays attention to the ministry of the congregation in the broad sense -- how well the congregation is ministering to its members, the surrounding community, and the world -- its professional ministers(s) being only part of the effort.
3. In either case, committee members should have the confidence of the minister(s) and the congregation or agency.

J. Review and Evaluation

1. It is the minister's responsibility to assess their own abilities, utilizing the various tools and methods available through the UUA or other resources, and to continue their professional development. The minister should also be prepared to assist congregations, agencies and enterprises they serve in developing strengths and competencies within the institution and in its leaders.
2. Congregations, agencies and enterprises use varying mechanisms for review. Each minister and institution must seek the means best suited to their situation, potentially including:
 - a. Ministerial Fellowship Committee renewal process;
 - b. Mission/Vision assessment;
 - c. Peer review;
 - d. Systems theory analysis;
 - e. Policy Governance means and ends assessment;
 - f. The UUA "Assessing our Leadership" process;
 - g. 360 Degree performance evaluation;

- h. Appreciative Inquiry
- i. Other professional organizations' assessment tools.

3. Mutual accountability between laity and ministers for the health and well-being of the institution's ministry is an essential purpose of review and evaluation. Ministers achieve greater accountability when there are regular reviews of their performance as measured by established goals, and reviews of their Letters of Agreement or contracts, including compensation. Congregations achieve greater accountability when ministers are included in the regular review of institutional performance, goals, and action plans. Such shared review can benefit the personal and professional growth of the minister, give strength and a sense of direction to the congregation or agency, and broaden areas of communication and cooperation between them.

K. Time

1. The tasks of ministry are too numerous for one individual to fulfill. Successful ministry requires the effective use of time by a minister. Ministers will determine the emphases of their ministries, and the weekly and annual structure of their time, on the basis of their interests and skills, as well as the needs of the people and institutions they serve and the demands of love and justice in the world.

2. Ministers are responsible for monitoring the boundaries of their work and energy, and for educating those they serve as to the structures of time that best protect their well-being and the quality of their ministry. In general a minister should be free to decide the organization and priorities of their own time, and consult with the governing body of congregations and agencies and/or their supervisors around these matters.

3. Provisions regarding professional service, continuing education, General Assembly, vacation, planning and study leave, and sabbatical should be set forth in the minister's Letter of Agreement or contract.

4. Various practices of deepening awareness, understanding, humility, and commitment to one's ideals are essential to the religious life. Time devoted to these practices is a necessary part of ministerial work.

5. Ministers must establish clear guidance about the best ways for staff, congregational leaders and those they serve to reach them in ordinary circumstances or in case of emergencies.

6. The Work Week in a Congregation

a. Full-time ministry consists of no more than an average of 48 hours or 12 working units (morning, afternoon or evening) per week. Part-time ministries take a variety of forms (as described Section 3d). Care should be taken to specify the expectations of time for all ministries. Included in this figure should be time for study and personal reflection, as well as opportunities for access to the minister. Attendance at meetings relevant to the congregation's programs is part of the minister's working week. A minister should be expected to spend no more than three nights per week involved in parish-related activities.

- b. Each minister should have at least one regular, scheduled day off (including evening).
- c. Each minister should be offered the opportunity to be free of congregational responsibilities at least one Sunday a month.
- d. Congregations and ministers must seriously examine and come to a shared understanding of their respective expectations concerning the ministers' participation in parish calling, committee work and meetings.

7. Professional Service, Continuing Education & General Assembly

- a. Professional Service: Ministers are often called upon to offer professional service in settings outside their congregation, agency, or enterprise. These invitations may include:
 - 1. Other congregations
 - 2. The UUA or District
 - 3. The UUMA
 - 4. Other professional organizations
 - 5. Local or national service organizations
 - 6. Interfaith work
- b. Continuing Education: Ministers are responsible for the ongoing development of their skills and competencies through a continuing education plan.
- c. Ministers and congregational leadership must jointly determine whether attendance at District Meetings and UUA General Assembly constitutes either:
 - 1. A meeting relevant to the congregation's program, and is considered normal working time, or
 - 2. Professional service, or
 - 3. Continuing Education.

In no case should attendance at these events be considered vacation time.

- d. Ministers should accept invitations for Professional Service and plan Continuing Education in consultation with their institutional leadership. Up to four weeks per year should be allowed for these activities.

8. Vacation

- a. The minister shall be allowed no less than four weeks of vacation each year.
- b. Vacation periods shall be agreed upon between the minister and institutional leadership and need not be limited to summer months. Vacation should be taken on a regular basis and not be allowed to accumulate.
- c. The minister will be expected to return from vacation only for the most serious matters constituting an institutional crisis. In the event the minister is asked to return from vacation, travel expenses will be reimbursed.

d. In the event of resignation or dismissal, earned vacation leave shall be paid by the congregation, agency or enterprise.

9. Planning and Study Leave

a. The minister shall be allowed no less than four weeks each year for planning, study, and preparation for upcoming ministerial activities.

b. If an institutional crisis occurs while a minister is traveling during planning and study leave, additional costs of travel will be the minister's responsibility.

10. Sabbatical leave is an investment that the congregation, agency or enterprise makes in the future of a ministry. Sabbatical leave is to be used for the minister's professional development, and is expected to benefit the institution and/or the movement.

a. The minister accrues one month of sabbatical leave each year, subject to the other conditions set forth in this section.

b. Unless otherwise negotiated, no sabbatical leave is to be expected prior to completion of four years of service.

c. Sabbatical leave may accrue up to a maximum of six months.

d. The length of any given sabbatical is a matter for agreement of the institutional leadership and the minister.

e. The congregation, agency or enterprise and minister will jointly plan for ministerial services during the sabbatical period.

f. If a sabbatical fund is set up, it should be clearly stipulated whether it is for the use of the minister.

g. It is recommended that the sabbatical agreement refer to general conditions for sabbatical leave. This should be supplemented by a letter composed by the minister and institutional leadership that sets forth the detailed conditions for each sabbatical.

h. A sabbatical may be taken separately from or together with vacation periods.

i. The minister shall not use sabbatical leave to search for another position, nor accept one during this time.

j. No action on ministerial evaluation, tenure or duties shall be pursued during a sabbatical period.

k. The minister shall receive full salary and housing allowance, as well as insurance and pension benefits, during the sabbatical. The sabbatical agreement shall specify how other normal ministerial allowances are to be handled.

l. The minister will be expected to return from sabbatical only for the most serious matters constituting an institutional crisis. In the event the minister is asked to return from sabbatical, travel expenses will be reimbursed.

m. The minister may be required to continue service to the congregation, agency or enterprise for some specified period following a sabbatical. This period will not be longer than one year.

n. In the event of a resignation or dismissal, accrued sabbatical time shall not be paid in financial equivalent.

L. Office

1. Each minister should have a suitable, furnished, sound-proofed, private office at the church, agency or enterprise or such other building as may be appropriate.
2. The minister may choose to conduct certain elements of their ministry from home.
3. It is wise for the minister to ensure that someone else is present in the building while meeting with individuals.
4. Secretarial support is an essential need for a minister; the ministry will be less effective to the extent that a minister is expected to perform secretarial duties routinely.
5. The minister should not be expected to perform custodial duties on a routine basis.

M. Staff Relationships

1. A harmonious and coordinated relationship among staff members is important to the wellbeing of any congregation, agency or enterprise.
2. Ministers will publicly and privately act with respect toward staff colleagues. Such behavior includes sharing of pertinent information and insights, providing programmatic support, honoring their professional abilities, respecting confidences, and giving public support although not necessarily agreement.
3. Arrangements for accountability vary. In some institutions the minister is head of staff. In others each member of the professional staff works with an appropriate committee, or is supervised by another member of the staff.
4. Ministers will encourage the staff to meet regularly to discuss and coordinate planning and administration.
5. Ministers need to recognize that inexperienced staff members will require additional time from them or other staff for training and development.
6. It is the responsibility of the minister to advocate for suitable compensation and benefits, fair working conditions and policies, clear job descriptions, and periodic review and evaluation for all staff.
7. Ministers will encourage congregations, agencies and enterprises, when hiring staff, not to discriminate on account of racialized identity, ethnicity, size, gender expression, gender identity, sex, disability, affectional or sexual orientation, family and relationship structures, age, language, citizenship status, economic status, national origin, or religion (if religious affiliation is not relevant to the position). However, the promotion of diversity should be taken into account when choosing among well-qualified candidates.

8. The authority of the office of the minister is grounded in trust, compassion and accountability to the mission of the institution they serve. Neither staff nor ministers should be required to work where harassment by anyone creates an intimidating, hostile, or oppressive environment. Ministers will educate institutions and their leadership to be particularly aware of their responsibility to provide an environment free from harassment based on racialized identity, ethnicity, size, gender expression, gender identity, sex, disability, affectional or sexual orientation, family and relationship structures, age, language, citizenship status, economic status, national origin, or religion.
9. Ministers must not engage in bullying or emotional abuse of staff in any venue or media. See the Addendum for a more detailed description of bullying and emotionally abusive behaviors.

N. Ministerial Compensation

1. Members of the UUMA support one another in expecting just compensation for professional services. The UUMA endorses the Fair Compensation Guidelines of the UUA, including recommended benefits as minimum standards.
2. The minister in a multiple staff congregation, agency or enterprise who has primary responsibility for the general direction and ministry of the institution should receive compensation commensurate with this larger and particularly sensitive responsibility.
3. A scale of fees for ministerial services, such as weddings, memorial services and supply preaching, will be maintained by the UUMA Board of Trustees. Revisions to this scale will be periodically presented by the Board of Trustees for review and adoption by the membership.
4. The annual process of determining ministerial compensation should be conducted with discretion and dignity. Budgetary deficits should not, except as a last resort, be covered by decreasing the minister's agreed-upon compensation.
5. Any overt linkage of ministerial compensation to new or increased pledges and contributions should be avoided, as it may distort the minister's relationship with the congregation and their commitment to serve people regardless of economic status.

O. Housing

1. Wherever possible and feasible, the minister should be allowed to select their own housing, and the privacy of that residence should be respected.
2. In the U.S., part of a minister's total compensation is a tax-exempt housing allowance, as defined by the I.R.S. It is best for the amount to be established by an annual vote of the board or congregation.
3. If a parsonage exists and the minister chooses to live there, certain understandings should be clearly established:
 - a. how and by whom routine maintenance is to be performed;
 - b. how and by whom repairs and improvements are to be decided, and paid for;

and,

c. respect for the privacy of the minister and family.

4. If the ministry ends by reason of the minister's death or disability, the parsonage should be available for the family's continued use for at least six months.

P. Other Benefits

1. Each congregation, agency or enterprise should provide the minister with benefits commensurate with the recommendations of the UUA Compensation Guidelines. These should include health insurance, life insurance, disability insurance, pension and contribution in lieu of employer's FICA. The UUA Contributory Pension Plan is currently available through the Association. However, ministers may be enrolled in other pension plans.

2. Because personal situations vary, benefit packages should be structured to reflect the needs of individual ministers.

3. In the event of disability, payments for salary and housing, contribution in lieu of FICA, insurance premiums, and pension contributions ought to be continued for six months or until disability insurance begins, if sooner.

4. Benefits for the minister and for all employees should appear in a budgetary category separate from salaries. Unless otherwise required, these should be paid directly by the congregation, agency or enterprise.

5. Beyond traditional honoraria, ministers should be cautious about the propriety of accepting personal gifts. Care should be taken to avoid the appearance or reality of exploitation or undue influence.

Q. Professional Expenses

1. It is the responsibility of the congregation or agency to provide for the expenses incurred in performance of its ministry. Ministers should be fully reimbursed for such expenses incurred in the course of their work. Funds sufficient for these expenses should be budgeted in a category separate from both salary and benefits.

2. Funds designated as professional allowances should be spent within broad categories. Such categories may include, but are not limited to: Books, periodicals, meetings, conferences, continuing education, hospitality, equipment, computers, software, communications technology, travel, transportation and child care related to professional travel.

3. For all such expenditures, the minister should present an itemized account for reimbursement.

4. The minimum conferences a minister may wish to attend include General Assembly, district annual meetings, ministerial gatherings and institutes at local, district and continental levels. All expenses should be paid out of professional expenses provided by the congregation, agency or enterprise for attendance at these events.

III. Responsibilities and Expectations Among Colleagues

A. Introduction

1. The goals of ministry are rarely achieved through isolated endeavor. Ministers may find themselves:
 - a. serving as colleagues in the same congregation, agency or enterprise;
 - b. serving as colleagues in different congregations, agencies or enterprises in the same community;
 - c. attending, belonging to or working with congregations, agencies or enterprises served by other ministers.
2. Congregations, agencies or enterprises benefit when ministers relate to each other in ways that model:
 - a. self and systems awareness;
 - b. healthy boundaries;
 - c. clear communication;
 - d. mutual respect, care and accountability;
 - e. a shared commitment to the well-being of congregations, agencies, enterprises and the UU movement.
3. Congregations, agencies or enterprises suffer when ministers relate to each other in ways that foster:
 - a. ambiguity of roles;
 - b. the division of loyalties;
 - c. a sense of suspicion, secrecy, self-pity or unhealthy competition.
4. Collegial relationships are expected to be professionally sensitive, respectful, and supportive. It is beneficial to collegial relationships for all members of the UUMA to attend chapter and cluster meetings and to welcome each other warmly at these gatherings.
 - a. Life Members and other retired ministers are appreciated at chapter and cluster events as they choose to participate.
 - b. In encouraging the participation of Community and Part-Time Ministers at chapter and cluster events, colleagues should recognize the challenges that such attendance represents and should facilitate the presence of these colleagues with the goal of maximizing inclusiveness.
 - c. Ministers in nearby congregations should recognize the challenges that interim ministers may confront in making collegial connections and help facilitate those connections when possible. Interim ministers and their colleagues all benefit from

when interim ministers attend UUMA chapter and cluster meetings and cultivate collegial connections.

5. Any minister who joins or participates in a congregation, agency or enterprise other than the one they serve, should recognize the authority other members may yield to them and exercise such influence cautiously and only as it supports the work of the current minister(s).

B. Ministers in Multiple Staff Settings

1. All ministers should understand, periodically review, and renegotiate when necessary, the document that sets forth their relationship with the congregation, agency or enterprise that calls or employs them.
2. All ministers serving together in the same congregation, agency or enterprise should develop written documents articulating the covenant of relationship and responsibility with the other minister(s) in that setting. These documents should be periodically reviewed, and renegotiated when necessary.
3. Collegial relationships between ministers serving together in the same congregation, agency or enterprise should be characterized by:
 - a. mutual respect;
 - b. support for the success of one another's ministries;
 - c. Shared loyalty to the well being of their congregations, agencies, or enterprises;
 - d. a commitment to good communication;
 - e. clarity regarding the assignment of roles, responsibilities, and authority.
4. Each minister, regardless of role, is entitled to all protections, rights and courtesies, and is bound by all collegial expectations, as defined in the UUMA Covenant, Code of Professional Practice and in these Standards.
5. Ministers must not engage in bullying or emotional abuse of staff in any venue or media. See the Addendum for a more detailed description of bullying and emotionally abusive behaviors.
6. Multiple ministers serving the same congregation, agency or enterprise are most likely to work effectively together if the structures of their roles are clearly articulated before these relationships begin, at the time of search, hire, call or affiliation. Structural elements may include, but are not limited to:
 - a. who has what degree of accountability for articulating the mission, vision or direction of the congregation, agency or enterprise;
 - b. whether the position represents a call by the congregation, hiring by the institutional leadership, or by a minister already on staff;
 - c. whether the position has the potential to become a called ministry, and if so how and by whom that decision is to be made;

- d. how and by whom and for what reasons the decision can be made to end the minister's tenure in the position;
 - e. how conflict between the minister and the congregation, or with other ministers working in the same setting, will be addressed; this would include clear processes by which a minister being supervised by another minister can report abuse;
 - f. what the lines of accountability, reporting, and supervision are.
7. In addition, when ministers serve together in the same setting, special attention needs to be paid to the power and privilege dynamics in the relationship(s) when there are differences in social location and historical marginalization. It is important to be aware that greater seniority does not always equal more power, for example, if the more senior minister is of marginalized identity or identities.
8. Should conflict arise between ministers serving together in the same congregation, agency or enterprise, every effort should be made to preserve the well-being of the institution. Provisions for this eventuality should be specified in the Letter of Agreement, contract or Letter of Affiliation between the congregation, agency or enterprise and the minister, and these provisions should be adhered to. In most instances Chapter Good Offices should be consulted.
9. As indicated in the Code of Professional Practice, ministers who function as supervisors to colleagues serving in the congregation, agency or enterprise have special responsibilities to those they supervise, including:
- a. conformity to the UUMA Code of Professional Practice;
 - b. awareness of a supervisee's job description and terms of employment;
 - c. creation and maintenance of a written list of mutually understood expectations;
 - d. self-awareness of power differentials that may exist between supervisor and supervised colleague;
 - e. dependable opportunities for collegial consultation and communication;
 - f. advocacy to address the ways differences in social location and historical marginalization may affect a colleague's ability to fulfill their ministry;
 - g. regular review and evaluation of the supervisee's job performance based on written job descriptions and expectations;
 - h. clear understanding of how the supervisee reports a supervisor's abusive behavior;
 - i. advocacy for a colleague's suitable working conditions;
 - j. recognition of a colleague's efforts, successes and accomplishments;
 - k. clarity in long range plans and directions that may affect a colleague's position;

- l. deflecting or countering unwarranted criticism or interference in the performance of the supervisee's ministry;
 - m. support for the colleague's professional development and future career.
10. Ministers who serve together without supervisory relationships will consider which of these obligations apply to them.
11. As indicated in the Code of Professional Practice, ministers who are supervised by colleagues serving the same congregation, agency or enterprise have special responsibilities to their supervisors, including:
- a. conformation to the UUMA Code of Professional Practice;
 - b. awareness of one's job description and terms of employment;
 - c. creation and maintenance of a written list of mutually understood expectations;
 - d. self awareness of power differentials that may exist between supervisor and supervised colleague;
 - e. regular collegial consultation and communication;
 - f. recognition of privilege arising from differences of social location and historical marginalization, and advocacy to address of the ways these conditions may affect a colleague's ability to fulfill their ministry;
 - g. participation in regular review and evaluation of one's job performance based on written job descriptions and expectations;
 - h. clarity about conditions necessary for the performance of one's ministry;
 - i. support to the organization served by adhering to the established lines of authority and keeping disagreements with supervisors between colleagues when asked.

C. Community Ministers

1. Community Ministers are urged formally to affiliate with a congregation in order to ground themselves in the support and accountability of a Unitarian Universalist covenantal community.
2. In congregations served by a Parish Minister, the Community Minister should initiate the application for affiliation through that colleague. Ministers serving congregations have a collegial obligation to encourage the congregation to prepare a process through which to respond to applications for affiliation from community ministers. In the absence of this process, congregational ministers should respond with thoughtful consideration to requests for affiliation.
3. Where the congregation is served by a Parish Minister, such affiliation should be based upon mutual respect and a clear understanding between the Parish Minister(s) and the Community Minister(s) of their expectations of one another, expressed in a Letter of Understanding which should be reviewed by the ministers periodically.

4. Community Ministers seeking to affiliate with a congregation not currently served by a minister should make their application through the congregation's governing body.
5. Affiliations established between a Community Minister and a congregation should be expressed in a Letter of Affiliation specifying:
 - a. financial support, if any;
 - b. possible establishment of, or inclusion in, a Committee on Ministry or Ministerial Relations Committee;
 - c. reasonable expectations of participation or service to the congregation by the Community Minister, if any;
 - d. any other expectations between the congregation and the Community Minister;
 - e. that the community minister will scrupulously follow established processes of the UUA Transitions office if they should pursue other ministerial positions in their affiliated congregation.
6. An affiliation established between a Community Minister and a congregation endures beyond the tenure of any minister of that congregation, and should be made known to any future interim minister and ministerial candidates.
7. All ministers shall respect the work of any Community Minister who is a member of the congregation that they serve regardless of whether the Community Minister affiliates with that congregation or not.
8. All ministers should keep Community Ministers apprised of actions they take that may bear on the work of the Community Ministers.
9. Community Ministers shall respect the integrity of the relationship between members of a congregation served by a colleague and that colleague. Parish Ministers shall respect the integrity of the relationship community ministers have with the individuals they engage in their ministries. Within the limits of professional confidentiality, if any minister has occasion to offer ministerial services to someone known or discovered to be in a professional relationship with a colleague, they should notify that minister about that occasion.
10. Ministers serving nearby congregations should recognize the challenges that community ministers may confront in making collegial connections and help facilitate those connections when possible. Community ministers and their colleagues all benefit from when community ministers attend UUMA chapter and cluster meetings and cultivate collegial connections.

D. Part-Time Ministers

1. Congregations, agencies or enterprises may call or hire a minister to serve alone in a part-time position. Congregations, agencies or enterprises seeking additional ministry may create a part-time ministry position in addition to existing full or part-time ministries.

2. Part-time Ministers are entitled to all protections, rights and courtesies, and are bound by all collegial expectations, as defined in the UUMA Covenant, Code of Professional Practice and in these Standards.
3. Financial support for the part-time ministry should reflect proportionally the full-time UUA Compensation and Benefit Standards and paid time off.
4. The responsibilities of a part-time minister should be described fully and carefully in writing at the time of hire or call.
5. These agreements should call for a specific amount of the minister's time to be given to the congregation, agency or enterprise including time for study, reflection, and planning for institutional crises. To the extent possible, working days and hours should be specified and respected by the institution, the part time minister and any other ministers serving the institution. Ministers should not be expected to attend meetings or events scheduled outside of agreed working hours.
6. The agreement should also address the following issues:
 - a. The part-time minister cannot be expected to do all that a full-time minister does. A clear division of responsibility should be maintained and regularly renegotiated and affirmed, between the part-time minister, institutional leadership, and any other ministers serving the congregation, agency or enterprise.
 - b. The well-being of both congregation, agency or enterprise and the minister depends upon their mutual ability to deal creatively and flexibly with frustrations that may result from the discovery that there is always more to be done than the scope of "part-time," however defined, will allow.
 - c. Since many part-time ministries may be part of fairly complex arrangements, procedures need to be established for renegotiating hours and duties as experience indicates. The work of a Committee on Ministry or Ministerial Relations Committee is often essential in part-time ministries.
7. Any service to a second congregation or other employment should be discussed in advance with institutional leadership and any other ministers serving the congregation, agency or enterprise, along with any expectations the institution may have concerning the nature of further employment.
8. If the minister understands the part-time ministry as a step towards a full-time position, this expectation should be described in writing along with the necessary conditions, and a timetable for renegotiating the agreement should be spelled out.
9. If either the minister or the congregation, agency or enterprise does not wish the part-time minister to be a candidate for its full-time ministry position in the future, this should be stated clearly at the time of call or hire.

E. Interim Ministers

1. All ministers should respect the unique expertise of Interim Ministers, be supportive of their work, and recognize the special challenges of the period of transition.
2. Interim Ministers are entitled to all protections, rights and courtesies, and are bound by collegial expectations defined in the Covenant, Code and Standards of the UUMA.
3. There are relationships between ministers and congregations, agencies and enterprises that endure beyond the tenure of any particular minister. Interim Ministers are expected to acknowledge and respect these relationships and not disrupt them arbitrarily. Colleagues in enduring relationships with congregations in transition are expected to support the work of the Interim Minister. These enduring relationships include:
 - a. Emeritus status as voted by the congregation;
 - b. Affiliation status of Community Minister(s); and,
 - c. the congregational call of other ministers.
4. There are other ministerial relationships that are contractual and may not be enduring in nature.
5. When interim ministers contemplate taking actions that will affect any of these relationships or bring them under congregational scrutiny they are expected to abide by any Letters of Agreement or contracts in effect and encouraged to seek guidance from chapter Good Officers. In addition, an interim minister may consult with the District Executive and the UUA Transitions Office.

F. Students

1. Ministers and students preparing for the ministry have much to offer each other in comradeship, encouragement and the exchange of ideas and experience. Discernment of fitness for ministry, and the nurture, support and training of future of colleagues are responsibilities of all ministers.
2. It is important that students become acquainted with the culture of Unitarian Universalism by being involved in the life of one or more congregations, interning at a Unitarian Universalist setting and attending UUMA Chapter Meetings and, if possible, UUA General Assembly.
3. It is important as well for UUMA members to behave toward students in candidate status with collegial respect, openness and hospitality, including at chapter meetings.
4. Ministers should be careful not to exploit their greater power relative to students, including interns.
5. Students in candidate status, who become members of the UUMA, are responsible for making themselves familiar with and abiding by the provisions of the UUMA Covenant, Code and Standards. This represents a change in role and status that will alter the nature of the students' relationships with both lay people and ministerial colleagues.

6. Part of preparation for ministry entails understanding and respect for the demands and constraints on a working minister's time.

G. Departing Ministers

1. In general, the future well-being of a congregation, agency or enterprise is best assured by the fully effective departure from leadership of any minister whose service to that institution has ended.

2. Congregations are especially vulnerable in periods of ministerial transition. Therefore, departing ministers should exercise particular care to minimize their influence and presence within the congregation, agency or enterprise and their interactions with members, staff and clients during times of transition.

3. There should be no intentional or ministerial contact between a departing minister and members, staff or clients of congregations, agencies or enterprises they have served until there can be a covenant expressed in a Letter of Understanding between predecessor and subsequent ministers. In those uncommon cases where personal or familial relationships persist, care should be taken to assure that those relationships do not have a negative impact on the institution or on subsequent ministries.

4. Experience has shown that over the long term a congregation and a previous minister may benefit from that minister's continuing participation as a member of the congregation after their professional leadership to that community has ended. Predecessor and subsequent colleagues should adopt covenants expressed in a Letter of Understanding defining the nature and limits of this participation.

5. Unless the departed minister chooses to suspend all contact and participation in the congregation during the period of an interim ministry, the Letter of Agreement with the Interim Minister must be understood to be limited only to the period of the interim ministry. It is the responsibility of both parties to make it known to the congregation that the agreement is limited and that the provisions of the agreement with subsequent colleagues may be significantly different.

6. The provisions of this covenant should be arrived at through conversation and negotiation with an understanding that the well-being of the congregation and the new ministry is of primary importance. When disagreements persist, Good Offices may be employed, but ultimately the judgment of the new minister shall prevail. It is the responsibility of the involved ministers to inform the congregation of this covenant.

7. If either a predecessor or successor minister believes that this covenant is not being effectively maintained, then they should engage their colleague and seek reaffirmation or renegotiation of that covenant with consideration for the delicacy of the current minister's role. Should this effort not resolve the concern, Good Offices should be consulted, and with the recommendation of the Good Officer the matter may be referred to the Committee on Ethics and Collegiality.

8. A departing minister may be expected to discontinue all contact with the congregation, agency or enterprise, its members and staff if:

- a. the former ministry involved established misconduct;
- b. the departed minister violates the UUMA Code of Conduct; or
- c. the departed minister intentionally violates the terms of the covenant with the new minister.

9. It is good practice for a minister to prepare family members to understand that a change in the minister's relationship with a congregation, agency or enterprise may affect them all, and may mean the end of ties that family members may have with that institution. It is politically wise and collegially generous for a successor minister to reach out pastorally to the family of the predecessor minister if they remain in the congregation or community.

10. When a minister is no longer a member of the UUMA, and is no longer bound by the Code of Professional Practice, the nature of the previous professional relationship with the people of a congregation or the clients of an agency or enterprise should not be exploited in the solicitation or conduct of their subsequent employment.

11. When a minister leaves a congregation for community ministry, they should not solicit members or presume upon a relationship they had with their former congregation until they have an opportunity to establish a covenant with the new minister of that congregation. In the absence of a new minister the covenant should be established with the leadership of the governing body of the congregation.

12. In all cases, ministers must continue to respect the confidences granted and the information about individuals gained in congregations, agencies or enterprises they once served.

H. Ministers Emeritus/a

1. Emeritus/a status may be granted by vote of a congregation, or agency leadership, at the completion of a minister's long and faithful service in that setting. Typically, the Minister Emeritus/a is entitled to a circumscribed continuing place in the life of the congregation or agency, although the minister may go on to serve in other positions elsewhere.

2. Relationships between congregations or agencies and their Ministers Emeriti/ae vary in expectation and practice. These relationships may include some or all of the following:

- a. a gift from the congregation;
- b. recognition by the UUA;
- c. a delegate credential for General Assembly;
- d. inclusion on the list of the congregation's staff on letterhead, etc.;
- e. ceremonial presence at major institutional events; such as anniversaries, building dedications, etc.;
- f. occasional invitations to appear in the pulpit;
- g. access to the institutional library or archives for research;
- h. a small expense allowance for professional pursuits;
- i. use of office space;

- j. the opportunity to purchase, or continued residence in, a church-owned parsonage.
- 3. The nature of the relationship should be carefully considered and agreed upon in writing by the congregation or agency and the minister. This agreement should be included in the Declaration of Emeritus/a status voted by the congregation or agency. This Declaration should be made known to the congregation or agency, as well as to any future ministerial candidates.
- 4. The role of Minister Emeritus/a must be exercised in such a way as to support the well-being of the congregation and the success of future ministers.
- 5. All expectations in the Code of Professional Conduct and the section of the Standards regarding "Departing Ministers" apply to Ministers Emeriti/ae, except as specified in the Declaration granting Emeritus/a status. The declaration, however, cannot over-ride the expectation of a covenant, expressed in a Letter of Understanding, with any successor colleague.

IV. Call, Initiation, and Severance Procedures

A. Candidating for Congregational Ministry

- 1. The UUMA supports the settlement procedures described in the UUA Handbooks on Ministerial Settlement and on Interim and Consulting Ministries, and calls upon our members to abide by them.
- 2. The UUMA endorses the UUA policy of non-discrimination in employment. Ministers should expect congregations not to discriminate on account of race, color, class, sex, sexual orientation, gender expression, age, mental and physical ability, national origin or ethnicity, except for the promotion of diversity when choosing among well-qualified candidates.
- 3. Ministers in search should expect the leaders of a congregation to have developed among members an explicit sense of common direction before search begins. Attempts to use pre-candidating and candidating procedures as a device for dealing with divisions among the members of a congregation are unfair to the candidate and may even seriously damage their career as well as the congregation.
- 4. Ministers in search should be candid in presenting themselves, past problems and achievements, and the reasons for wanting to serve a new congregation. They should expect the congregation to be equally forthright in its presentation to candidates and potential candidates. Truthfulness is particularly important in the following matters: resources, number of members, financial position and activities, past problems and achievements. The congregation should be completely candid with reference to the previous minister's departure. The candidate should be equally candid.
- 5. When a minister has accepted a search committee's invitation to participate in a pre-candidating weekend, that pre-candidate is understood to have a commitment to appear in the neutral pulpit as arranged, regardless of the offers they may have received from, or preferences they may feel for, other congregations. At a minimum, if the pre-candidate cancels their scheduled appearance, they are obligated to arrange for, and

compensate, a substitute preacher. If the pre-candidating weekend is canceled by the search committee, it is that committee's responsibility to arrange for the filling of the neutral pulpit.

6. Candidates should expect the congregation to be clear about their needs, and resources for the provision of financial support and supportive assistance for the work of ministry. Candidates should be prepared to discuss their financial needs and expectations and how their compensation package should be structured.

7. Substantial accord on major issues relative to the Letter of Agreement should precede the candidating week.

8. Before accepting a position in a congregation, agency or enterprise with more than one minister, a candidate should engage in discussion with colleagues who will work together, giving careful thought to lines of authority and responsibility. These structures should be well articulated.

9. When another minister is being called, a minister continuing to serve in a multi-minister congregation, agency or enterprise should expect to be consulted by the Search Committee, or in some circumstances to serve on it.

10. The minister's spouse or partner should be present for at least a part of the candidating period. The congregation should assume all financial commitments related to this visit.

11. During the candidating week, time should be available for connections with UUMA colleagues. Members of the Search Committee should not participate in such events.

B. Moving Expenses Associated with Congregational Ministry

1. The size and resources of our congregations vary, as do the needs of ministers and their families when the expenses of the minister's move to a new location must be met. Of greatest importance is that any agreement reached with the newly called minister be written in detail to avoid possible hurt and confusion at the onset of a ministry, especially since it is not uncommon for changes in budget and congregational officers to occur between the time a minister is called and the time when they actually move.

2. A newly called minister should expect a detailed written agreement regarding moving expenses. This should be negotiated before the candidating week takes place. Items to be noted should include:

- a. total amount budgeted by the congregation for moving expenses;
- b. who contracts any commercial moving services;
- c. precisely what fees for assistance are allowable;
- d. miles of travel per day;
- e. mileage allowance;
- f. food and lodging costs;
- g. who is to help and how;
- h. ample insurance to cover damage to furniture and other possessions; and,
- i. schedule for advances and/or reimbursement of all expenses.

C. Letter of Agreement as an Expression of Congregational Call

1. The covenant between a minister and a congregation takes the form of an exchange of letters following the vote to call. It is essential that the congregation issue such a Letter of Agreement, and that the minister respond in writing. Items for consideration are extensively covered in the appendices, which should be read with care.
2. The written Letter of Agreement should describe expectations and obligations of congregation and minister, and should be reviewed periodically.
3. The Letter of Agreement should be understood as a commitment of mutual service and support and not as a detailed contractual arrangement. The language in the Letter of Agreement should reflect the dignity of the congregation and the ministry, clearly leaving to the minister wide professional discretion in the exercise of the calling, and at the same time clearly spelling out the kinds of services required and the means of accountability to the congregation.
4. In general the Letter of Agreement will be drawn up by a negotiating team in conversation with the candidate. The candidate may invite the assistance of a Good Offices Person or another colleague in that conversation.
5. In all cases the minister and the appropriate and empowered congregational body should agree to the terms of the Letter of Agreement before the congregation's call to service is issued or accepted.
6. The congregation's call to service, as expressed in the Letter of Agreement, can only be terminated by a subsequent vote of the congregation, according to its by-laws, or by the resignation of the minister.

D. Contract as Employment Agreement

1. Congregations, agencies, and enterprises may enter into relationships of ministry that do not constitute a covenant of call. These employment agreements take the form of a contract between the minister and the governing body of the institution establishing the rites and functions normally associated with ministry.
2. Contracts should specify expectations and obligations of the minister and the institution, as covered in Section II, Ministers Expectations of Institutions They Serve; including (but not limited to)
 - a. Compensation
 - b. Professional Expenses
 - c. Working hours
 - d. Vacation, Study Leave, Sabbatical, Continuing Education and Professional Service.
 - e. Benefits
 - f. Duties
 - g. Evaluation

- h. Expected duration of the ministry
 - i. Cause and procedure for termination
3. If the minister understands the contract ministry as a step towards a called position in the congregation, this expectation should be described in writing along with all necessary conditions for that change.
 4. The contractual employment of a minister can be terminated by:
 - a. expiration of the established duration of the ministry;
 - b. action of the governing body of the institution;
 - c. action according to the terms of the contract; or
 - d. the resignation of the minister.

E. Initiation of Congregational Ministry

1. The minister should work with the governing body and the search committee to identify a process of communication for that fosters realistic mutual expectations for the initiation of the new ministry.
2. The minister, the governing body and the search committee should decide on a time for the search committee to celebrate and disband, and what continuing role the members of the search committee may have in facilitating the new minister's settlement.

F. Departure from Congregational Ministry

1. The minister should relate in confidence to a responsible congregational official (usually the president or a chair of the Committee on Ministry or the Ministerial Relations Committee) when the minister has accepted an invitation to precandidate in another congregation or agency, or when a firm date for retirement or resignation has been decided.
2. The governing body should be informed of the minister's decision to candidate for another position, or when a minister's decision to retire or resign is to be made public.
3. Upon acceptance of the call from another congregation or agency, the minister and governing body should confer with regard to the most constructive manner of informing the congregation.
4. A date for the end of active ministry in the congregation or agency should be agreed upon by the minister and governing body. Until that date, the minister can (and often should) help the leaders to prepare for the vacancy in the ministry. This may include educating members about interim, candidating and settlement procedures, including the importance of early consultations between representatives of the congregation and the District Executive, the Ministerial Settlement Representative and the Transitions Office. However, departing ministers must take no direct role in structuring the search process.
5. It is generally inadvisable for any minister to suggest or comment on candidates to serve as successor. If a congregation, and its minister, agree to engage in succession planning, this must occur before the timing of the minister's departure is shared.

G. Dismissal and Negotiated Resignation

1. The following procedure is designed primarily for congregational settings. However, some of these provisions may usefully be applied by ministers departing from other agencies or enterprises.
2. When conflict in the congregation, agency or enterprise, reaches a significant level of severity, ministers should consult with Good Offices and draw upon the resources of the UUA and its field staff.
3. When a settlement seems to be in imminent danger of ending because of discord, the minister and the congregation, agency or enterprise, may need to choose between a vote to dismiss or negotiating a resignation. While it may, in some instances, be to the benefit of the institution to go through a painful process of a vote to terminate, often the interests of both the institution and the minister are better served by negotiating the minister's resignation. Such a decision and the ensuing negotiations will benefit from the advice of Good Offices and the District Executive, each attempting to facilitate a solution that serves the interests of all parties.
4. Ministers should strive to end their tenure of leadership in a congregation, agency or enterprise, in such a way as to protect the well-being of the institution, and not contribute to needless polarization within it.
5. In the event of a negotiated resignation, unless otherwise provided in the Letter of Agreement, salary, parsonage use or housing allowance, and benefits, although not professional expenses, are expected to continue at the same level for the longer of three months or one month for each full year of service up to eight months from the date of a negotiated resignation, or until the minister has found another position, if sooner. Minimal contractual obligations should apply in the case of criminal malfeasance or of an acknowledged violation of the Code of Professional Conduct directly injuring the involved institution.
6. Although a Letter of Agreement may call for a specified period for notice of resignation, the minister and governing body may agree to an earlier cessation of ministerial activities while the minister is still receiving compensation and benefits.
7. In negotiating a resignation, ministers should not propose or accept an arrangement whereby the terms may not be disclosed.
8. When the future of the ministry is to be submitted to a vote of the congregation, ministers should be aware of the provisions of congregational bylaws and their Letter of Agreement, and insist that these be followed.
9. Following a vote to dismiss, the minister should withdraw from all active participation in the congregation, agency or enterprise for the rest of the severance period.
10. In the event of dismissal the minister should expect any accrued vacation to be compensated in the financial equivalent, but the minister should not expect any accrued sabbatical leave to be compensated.

06/2011

V. Social Media and Online Ministry

A. Preamble:

Social media changes all of the time with application updates, privacy setting changes, and the emergence of new social media platforms. Given its quickly changing nature, any “rules” we might create could be rendered obsolete shortly after their creation. Instead, we suggest you consider the following values and questions when engaging online. As a reminder, our UUMA covenant, guidelines & standards of professional practice all apply to our electronic communications and social media.

B. Values:

We seek to embody the following values as ministers:

- Integrity
- Honesty
- Trustworthiness
- Compassion
- Respect
- Caring/ Loving
- Honoring
- Bringing people together
- Using our power constructively, mindful of our potential to unconsciously perpetuate systems of oppression
- Justice seeking
- Bearing witness to reality
- Refraining from abuse or exploitation
- Providing leadership
- Being of service
- Being open to new understanding

C. Questions:

1. How does this post or comment express my understanding of covenant?

Our UUMA Covenant, Guidelines and Standards of Practice apply to all electronic communications.

- Does this post have implications for my covenant with my colleagues?
- Would I say this if I were speaking face-to-face with another colleague? With a group of colleagues? From the pulpit?

2. How are our Unitarian Universalist values and vision expressed in my communication?

- What kind of conversation am I starting or encouraging?
- Who is this conversation serving?

3. How does what I’m saying reflect on Unitarian Universalism?

As ministers we are always representing Unitarian Universalism. People learn about who we are based on their reading of our individual posts and comments.

- What will someone new to Unitarian Universalism learn from my post?
- If I look at my post or comment as evangelism, where is the good news?
- When we disagree with our institutions, how we communicate our concerns matters. Institutions are made up of people, and how we treat other people online becomes part of the online UU identity. Are my comments towards institutions expressing the values of our Covenant?

4. What is my tone?

Without vocal tone or visual cues to guide us, online comments can easily be misinterpreted. Be mindful that disagreements can escalate quickly on social media. As leaders, we are responsible for managing our own resilience. Consider stepping away from the conversation and coming back to it after a rest.

- Why am I posting? Am I feeling tired, angry, scared?
- If there is conflict, how is my contribution going to de-escalate the situation?
- If I've already contributed to this conversation today, would it better to wait 24 hours before adding anything further?
- Would this conversation be better furthered by a phone or face-to-face conversation?
- How will my post draw people into conversation?

5. In what ways am I in relationship with my intended audience?

Ministry happens in relationship, whether online or in person. Be transparent if you have a vested interest in a conversation. Be accountable if you are speaking about other people or institutions.

- If you are posting anonymously, how are you in relationship with your audience?

6. How would I feel if my post or comment were shared beyond the intended audience?

Be sure to understand who will be able to access what is created on any electronic platform. Know the available privacy options and any group covenants. Be mindful that electronic media can always be shared through screen capture: anonymity and privacy cannot be guaranteed.

- Will I be embarrassed if this post appears somewhere else?

7. Would I be uncomfortable if the people I serve read this post?

Be aware that distinctions between public and private are increasingly blurred online, and the nature of online communication is such that a post made in one platform may well show up in another. Understand that our UUMA Covenant covers everything you say online, and your personal communications may end up being read by congregants or others who do not distinguish between personal and professional.

- Within your post, how do you convey when you're speaking for yourself and when you're speaking from the authority and accountability of your role?

8. Does my communication reflect best practices for working with children and youth?

Consider carefully before communicating online with children and youth, accepting friend requests, etc. If your role calls for you to communicate directly with children and youth online, be sure that your organization has a policy stating how this will happen. Be aware that you don't always know the age of people accessing information: the audience of your posts may include children and youth.

- Would you say this to a child or youth if you were face to face with them?

9. How does my communication support my colleagues' ministries?

We envision a vibrant network of interconnected ministries that strengthens the reach and impact of Unitarian Universalism. How might our online activity and practice of collegial covenants support this vision?

- How might I covenant with an out-going minister in a way that strengthens Unitarian Universalism as well as my ministry? With other ministers in my area?
- How might working together strengthen the presence of our faith in people's lives?

10. Does my online behavior support clear, covenanted boundaries at the beginning and end of ministries?

Our guidelines call us to establish clear boundaries for healthy transitions. We develop these boundaries in covenant with our predecessors and/or our successors. The nature of the changes will vary depending on the context and the preferences of the colleague continuing in the role. Requested actions might include everything from staying "friends" but not responding to posts by former congregants up to and including de-friending of former congregants. During a ministry, as you develop new platforms for online communication, consider how you will change your use of the platform when you leave your role.

11. Have I taken power dynamics and the nature of systemic oppression into account in this post or comment?

- How do power differentials and identity differences affect my use of social media? How do they impact others?
- Who is missing from this conversation?
- What can I do to make this conversation more inclusive, just and equitable?

If you hesitate—even for a moment!—over the answers to any of these questions or how to embody our values and Covenant, consult a trusted colleague or good officer.

06/21/2017

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ADDENDUM: DEFINITIONS

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A. Bullying and Emotional Abuse

Ministers must not engage in bullying or emotional abuse of colleagues, staff, congregants or anyone else they serve. This may include, but is not limited to, a pattern of:

- Speech and/or behavior that is derogating, demeaning, controlling, punishing, or manipulative.
- Withholding communication, support, or resources.
- Passive-aggressive behavior (covert hostility).
- Inappropriately leaving a person out of decision-making.
- Spying, stalking, hovering, and invading someone's person, space, or belongings.
- Making threats, judging, destructive criticism, lying, blaming, name-calling, ordering, and raging.
- Couching criticism in the form of jokes, sarcasm or teasing.
- Opposing: a pattern of arguing against anything someone says, challenging their perceptions, opinions, and thoughts. Treating another as an adversary, in effect saying "No" to everything, so a constructive conversation is impossible.
- Blocking: may include switching topics, accusations, or use of words or other means to stop conversation.
- Discounting and belittling: minimizing or trivializing someone's feelings, thoughts, experiences, or credentials.
- Undermining and interrupting: use of words intended to undermine someone's self-esteem and confidence, such as, "You don't know what you're talking about," finishing sentences, or speaking on someone's behalf without their permission.
- Denying: denying that agreements or promises were made, or that a conversation or other events took place, including prior bullying behavior. In the extreme, a persistent pattern of denying is called gaslighting.
- Isolating a colleague/staff person from systems of support.

Colleagues need to be sensitive to cultural differences in expression. Expressing emotions or raising one's voice is not in and of itself bullying or emotional abuse. Colleagues also should be

sensitive to the fact that prior trauma affects how people interact with each other. One person's loud expression may be a trigger for another person. If we are triggered by an interaction with a colleague, we can contact a Good Offices Person for help in processing the interaction and restoring covenant. Finally, colleagues should also be aware that appropriate use of power by supervisors, which includes (but is not limited to) setting limits for employees, expecting certain levels of performance, and asking for accountability when expectations are not being met, is not considered bullying.

B. Tokenism

Tokenism in the context in which we practice refers to any superficial gesture, however well-intentioned, of accommodation to the principles of diversity, equity and inclusion of members of underrepresented, historically-marginalized groups. The practice of tokenism may include a sense by a member of the dominant group of fulfilling an ethical mandate, of "doing the right thing", or of avoiding criticism. Within the context of our ministries, tokenism may appear, for example, in the areas of hiring practices and volunteer recruitment, congregational membership, and programming.

Avoiding tokenism requires ministers to deepen their understanding of the values of promoting such diversity, equity and inclusion.

The following questions may be helpful:

1. When seeking to bring or add diversity to the setting in which I serve, what is my motivation?
 - a. Am I seeking to make the setting "look" more diverse?
 - b. Is it to experience a sense of pride in "doing the right thing?"
 - c. Am I trying to bring in "the (name of marginalized group) perspective?" (There is no such thing as a single perspective within any marginalized group.)
 - d. Do I expect someone who identifies as a member of a marginalized group to be an "expert" on that identity? (An example would be expecting a transgender person to be an expert on all transgender issues.)
2. When hiring or recruiting volunteers, am I considering the candidate's identity more than their areas of knowledge and expertise?
3. Am I or is the leadership of the setting in which I serve:
 - a. hiring or recruiting members of marginalized groups to leadership positions, but keeping all the power?
 - b. hiring or recruiting members of marginalized groups only for positions related to that identity?
 - c. maintaining an organizational structure that promotes and protects the dominant culture, which may include practices such as a lack of transparency, withholding information, and making indirect statements?
4. Am I deepening my understanding that the equitable inclusion of people of diverse identities and from diverse backgrounds:

- a. provides opportunities for people who have historically been denied such opportunities?
- b. gets us out of our own “echo chamber” and enables us to gain understanding that comes from voices outside of the dominant culture?
- c. brings a variety of new perspectives to a religious community which will enrich and change that community?

C. Who is Served by a Minister

In general, the people you “serve” as a minister refers to the individuals or population with whom you interact as their particular professional in a way that creates a differential of power and vulnerability. If you are in a congregation, it means congregants. If you are a pastoral counselor, it means your clients. If you are a professor in an academic institution, it means your students. If you are a community minister, it is whatever population you serve that meets the above criteria. While this provision would allow for a guest minister or an affiliated minister of a congregation to date a congregant, it is strongly advised to consult with the minister or senior minister of that congregation before proceeding. For affiliated ministers, we strongly recommend addressing the appropriateness of dating congregants in an affiliation agreement.

CANADIAN SUPPLEMENT

For the Guidance of Ministers

Serving Canadian Congregations

This supplement has been prepared to reflect the differences in the law and in social benefits between Canada and the US as they affect ministers entering into agreements with Canadian congregations.

Although Canadians and Americans are accustomed to crossing each others' borders for vacation and business reasons, and although we seem very familiar to each other, moving to Canada is still moving to a foreign country. This means that issues like tax law, although similar in principle, are different in the particulars.

This means that one cannot take for granted that issues like housing allowances are treated the same way, although the net ultimate effect may be the same. Because of the proximity of our two countries and because many people besides ministers move back and forth, there are arrangements to facilitate most issues like pensions that are ongoing in peoples' lives.

Canada is by American standards a socialist country which means that there is universal health care and unemployment insurance. These social safety nets cost money. The result is that the standard of living is not as high, however the quality of life for most people is higher. Attempts to make direct comparisons between salaries in the US and salaries in Canada are deceptive. Although Canadian currency is also based on "a dollar," each dollar represents a different set of social choices - different, not necessarily better.

A minister entering into an agreement with a Canadian congregation will still be considering the same things - housing, pension, benefits - as in the US. They may have to be arranged a little differently to produce the best income possible from the package the congregation is offering. There are many ways to structure salaries and many individual lifestyles to consider.

Moving to Canada does mean paperwork, but if undertaken step by step (remember linear thinking) it is not unduly complicated.

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Commentary

(All references are to sections in the body of *Standards of Professional Practice*.)

General Comment: In Canada, for all secular purposes such as income tax, the Canada Pension Plan and Unemployment Insurance, ministers are considered employees. Therefore, both the minister and the congregation are required to make payments into the plan in amounts determined on the basis of salary. Note: Unemployment insurance is covered in a compulsory plan similar to the Canada Pension Plan. Federal and Provincial Income Taxes are also deducted by the employer.

Section I.B.7.n In Canada we do not have Districts nor are Canadians officially part of the UUA. This should be read as “regional and CUC affairs”.

Section I.B.8 As noted above, ministers are considered as employees for tax purposes. This does not negate the intent of paragraph 8, but it may impose a level of “standardization”.

Section II.F.1.a Parental leave is mandated differently in each province. Where parental leave is a relevant issue, any Letter of Agreement or Contract will have to conform minimally to the laws of their jurisdiction.

Section II.K.8.d Payout of accrued vacation upon termination is required by law and is set at 4 percent based on salary earned from the previous June 30 to the date of termination. Contracting parties may choose to set a higher level of compensation in advance or through negotiation at time of termination.

Rights and responsibilities at time of dismissal are not covered in the current Standards of Professional Practice. Differences in Canadian and US law make this worth mentioning. Employment law is significantly different in Canada from that in the US. Ministers who feel that they might be dismissed or pressured to resign should make sure they know their rights, not in order to exacerbate the situation or to encourage litigation but rather to facilitate a fair settlement. Congregations which feel that they might want to dismiss a minister should also be very aware of the consequences of taking actions which could be construed as wrongful dismissal. Before any action is taken, either or both parties should, in addition to using all UUA resources, consult with the Executive Director of the Canadian Unitarian Council for general advice about relevant considerations in the Canadian context.

In Canada a distinction is drawn between being dismissed for cause and being dismissed. “Cause” is a term of art and in general means particularly egregious behavior such as repeated drunkenness in the pulpit, failure to conduct services with no notice given or molestation of children in the church school. In situations where there is clearly cause, no benefits of any kind and no salary need be paid after the date of dismissal. Where “cause” in the legal sense cannot be established it may be that longer benefits than those described as normal in the US will have to be paid. In either case the minister is entitled to be treated fairly, to know the details of the charges and to have an opportunity to reply. Failure to proceed fairly can result in a review by the courts. Separation of church and state is not observed rigidly in Canada, and there are an increasing number of cases where courts have concluded that ministers were not treated fairly.

Section II.K.10.n Depending on the terms of the minister's agreement with the congregation a financial equivalent to the accrued sabbatical leave might be required. It could also be part of a negotiated settlement.

Section II.0.2 Revenue Canada does not require that housing allowances be the subject of a vote. The housing allowance for a minister is the fair market rental value of the minister's accommodations, whether rented or owned. The decision about what this amount should be is a personal matter for the minister to determine after consulting local real estate people or looking at the cost for comparable accommodations. Therefore, in Canada the housing allowance should not be listed separately. When the minister has decided on the appropriate amount, the person responsible for producing the paychecks should be informed so that income tax will only be withheld on salary minus the amount of the housing allowance. There is a government form to be completed by the congregation stipulating the amount set aside for Housing Allowance

Section II.0.3 There are, at the present time, no Unitarian parsonages in Canada.

Section II.P.1 Ministers serving in Canada may continue in the UUA pension plan. The CUC has letters on file confirming this. Ministers may also continue in the UUMA disability plan in order to avoid paying tax on the proceeds in the event of collecting under the plan. The cost should be paid by the minister rather than the congregation. Health insurance is universal in Canada. In some provinces it is free; in others there is a small charge. This insurance covers virtually all medical situations, though does not usually provide drug benefits, alternate therapies or disability. Supplemental insurance is available at reasonable cost. Some congregations include supplemental and disability insurance as part of their package.

Section II.Q.1 Car allowances for ministers are treated like housing allowances. There is discretion for the minister to determine the amount to be claimed. For this reason car allowances should not be listed separately but should be included in the salary.

Section III.D.3 In Canada, employers are generally required to provide benefits to employees working half time (20 hours/week) or more. Benefit packages for less time can be a matter for negotiation with the congregation.

Section IV.C.1 and IV.D.1 A non-Canadian minister coming to Canada faces immigration challenges. The congregation and minister will be required to provide considerable additional documentation beyond the Letter of Agreement. Further, spouses and children of the ministers are not automatically granted visas or work permits. Ministers considering such a move are urged to contact the CUC early in the discussion process. Though many attempts have been made to create a publication covering immigration, changing regulations and even attitudes of individual officials make a complete and straightforward manual impossible. Colleagues who have in recent years been through the process can provide valuable first person insight. They underline that while time consuming, the immigration process to Canada is comprehensible and fairly straightforward. The key issues are establishing a time-line/schedule well in advance and following through step-by-step in the process. Legal assistance may be necessary; consult with the congregation, the CUC, and/or the UUA.