

LEADERSHIP TRANSITION GUIDELINES & ELEMENTS

***"The way a minister leaves a ministry
and the way the leadership and congregation
supports the leaving in the ensuing months will strengthen
a spiritual community or leave so much unfinished business
that it will take the new minister a year to clean up the debris."***

~ Loren Meade, *founder of The Alban Institute*

Transition Time

The community must take ownership and participate in the transition process as they move from one minister to the next.

Intention

To provide the ministry with a seamless and unified transition between the minister leaving and the new minister coming in.

UWM Assistance

Is available to coach, guide, and support the board, staff, and ministry. Please email membersupport@unity.org

This often includes working with a UWM Certified Consultant – Ministry Consultant, Transition Consultant, or Transitional Specialist.

Regional Assistance

Regional support is also available for assistance for ministries, leaders, programming, children, youth, and teen resources. Visit the link below and select the region the ministry is located in.

<https://www.unityuwm.org/regional-information>

Goals

- To provide support to the board in times of transition between spiritual leaders.
- To ensure the integrity of the ministry's vision and mission are upheld.
- To use this time of transitional for spiritual growth.

Communication to the Community

During times of change and transition, it is important for the Board/Leadership to inform the spiritual community about progress, plans, decisions, and happenings at the ministry using a variety of communication methods. You cannot over-communicate but do try.

Increasing communication will alleviate the anxious questioning that will naturally occur in the community during times of change. For some individuals, things will be happening too quickly, for others it will be too slow. Practice compassion for yourselves and one another, trusting the process is in Divine Timing and Divine Order.

Board Considerations & Admin Staff and Volunteer Team Lead Inclusion

It is recommended that the board utilizes the administrative wisdom of the office staff. This position is a key role and very often the "glue" that keeps everything running smoothly. This position typically knows more than what is in their job description.

It is recommended that the board gathers all the volunteer area team leads together to discuss how the ministerial change may affect their area.

Listen to their needs and concerns. Meet monthly (or, as deemed necessary) to collaborate, share updates as to their areas of responsibility, and support one another. to stay in communication to support the overall congregation. This team will support the health and well-being of the ministry by working together in collaboration.

Be Intentional

Focus on the aspects of what you as a spiritual community desire in your future and focus on the unlimited possibilities in store for the ministry and community as a whole.

Procedures

Celebrate, when possible, the minister's leaving. In preparation for the minister's departure, the Board is responsible for the creation of a celebratory event to assist in providing closure for the congregation.

For example:

- Create a farewell ceremony for the community to bless and have closure with the minister (and spouse if applicable).
- Create a circle where each person can share a word or phrase of appreciation for the minister.
- Recognize the minister cannot serve without the support of their spouse, so recognize and bring the spouse into the circle for a Unity Blessing also.

Before the minister leaves, if possible, a Board Member holds an exit interview with the Minister to recognize the contributions the minister is most proud of and ask what things the minister would like to see done differently for the next minister.

The minister can also meet with the Regional Representative and/or the UWM Member Support Team. UWM has a document for a departing minister to complete. This document may be used by the UWM Certified Consultant in their work with the ministry.

The UWM Member Support Team also interviews the Board regarding the minister's contributions and vision for the future. An assessment is undertaken to determine the appropriate level of support services the ministry requires. Based on those findings, multiple pathways exist for the next steps. This could lead to utilizing the services of a UWM Certified Consultant, beneficial training and workshops, an intentional interim minister for some time, or preparing for the employment process. Several contributing factors are considered in determining the recommendations from the UWM Member Support Team.

Important Areas of Responsibility:

Based on each unique ministry, individualized staffing, skills, volunteers, and board member responsibilities each individual supporting the ministry will be given a specific area of responsibility, level of reporting, and authority by the Board. These shall be published and communicated to the congregation:

- Board Member Liaisons (ex.: liaison to Volunteer Team Leads, liaison to staff, liaison to the Sunday Service Coordinator, etc.)
- HR & Administration
 - Staff support/supervision

- Day-to-day financial administration oversight and decision-making
- Facilities oversight
- Marketing & Technology
- Primary Contact for Team Leaders (or a separate area of focus)
- Sunday Service Coordinator (possibly combined with Guest Speaker Coordinator)
 - Point person for Sunday Teams and guest speakers, to ensure a rewarding Sunday experience for all
- Guest Speaker Coordinator (possibly combined with Sunday Service Coordinator)
 - Schedule and coordinate with guest speakers
 - A form that outlines Guest Speaker expectations is helpful, such as timeframes to provide the ministry with lesson title/synopsis/music requests, when to arrive, order of service, etc.
- Pastoral Care/Chaplain Team Leader
 - This support service requires a properly trained individual
 - Visitations, wellness calls, prayer (not pastoral counseling; refer to credentialed professionals)
 - It's recommended a licensed Unity Minister is on hold/retained for potential emergencies such as a death, spiritual counseling, or conducting of memorials and weddings
- Primary Contact for Team Leaders (or a separate area of focus)
- Adult Education, Class, and Special Event Coordinator
 - A class/facilitation application with the required elements to submit to the coordinator is helpful.
- Youth Education, Class, and Special Event Coordinator
 - Please visit the multiple resources available on www.unityuwm.org
<https://www.unityuwm.org/startingenhancing-youth-family-ministry-program>
- Any other unique areas for your ministry?

NOTE: Team members may be assigned multiple roles/areas of responsibility if agreed.

Team Member Responsibilities

Each member of the Leadership Transition Team shall provide a brief written report of their progress for weekly team meetings, whether face-to-face or virtually. The weekly report will include an anticipated schedule of special activities for all members of the team to be aware of and to collaborate for mutual success.

Collectively this team will ensure that all initiatives and day-to-day operations of the ministry function in a seamless and unified manner.

This team is different than the Ministerial Search Team and thus, has different roles and responsibilities. This team shall have no responsibility or relationship with the Ministerial Search Team. Each should have separate members.

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Tasks for Consideration

Guest Speakers Coordinator & Classes & Special Events Coordinator

- From the previous minister acquire names, references, and contact information for possible guest speakers, licensed Unity teachers, and other Unity ministers in the sub-region.
- Consult with the previous minister to obtain forms and learn and document the processes for managing guest speakers and musicians, teachers, and workshop presenters.
- Review and develop a church calendar for the future, to include Speakers, Singers, Workshops, Classes, and special events.
- Payment amount and process for guest speakers, singers, and workshop presenters.
- Receipt of payment and process for renting out space for activities, memorials, and weddings.

Administration & HR

- Consult with the previous minister to learn processes and obtain forms for how the ministry is managed, including:
 - Login and passwords to all business applications such as:
 - Telephone
 - Website
 - Virtual Meeting Apps such as Zoom, etc.
 - Financial Apps such as QuickBooks and On-line Banking or Bill Pay
 - Communication Apps such as Constant Contact
 - Social media applications such as Facebook, Twitter, YouTube, etc.
 - Create a new minister's email address for the old address to be forwarded to
 - Board agenda and meeting minutes process
 - Verify the location of Policies, Procedures, and Job Descriptions
- Get a copy of all church business files from the previous minister's computer.
- Determine and manage who has keys to the building and access to each room in the facility, including any leased or storage space that may belong to the ministry.
- Obtain a list of all service contractors (with name, phone number, and address) including:
 - Banking
 - Insurance
 - Lawn Care
 - Cleaning Services
 - Paper & Cleaning products supply company
 - Phone service
 - Electricity
 - Mortgage Company
 - Printer repairs
 - Server and Network Maintenance
 - Piano/Organ Tuning
 - Pest Control Company
 - HVAC Company
 - Special Bulletins and Stationery
 - Printing Service for seasonal mailings
 - Others?
- Verify where financial procedures are documented, then review and update as needed, including:

- Document financial process from offering to bank
- Document financial process from bank to bill paying
- Document Payroll process
 - Who are the employees
 - Salary and terms for ALL who get paid
 - Who are 1099 contractors (like musicians)
 - Accounting/Payroll services
- Document the process/policy for creating and signing manual checks
- Document the financial process for weekly balancing
- Petty cash process
- Document the financial process for monthly balancing
- Document monthly financial reporting process for the Board
- Staff and Volunteer job descriptions
- Documentation of who has church credit/debit/tax-exempt cards
- Complete the financial process for weekly and monthly balancing
- Complete monthly financial reporting process for the Board
- Complete the financial process for weekly balancing
- Discuss the Gift card process and accountability
- Discuss and document the process for Bookstore sales and ordering
- Discuss the process for ordering UWM and UWH materials

Shortly before the previous minister leaves:

- Offer assistance with packing, if appropriate.
- Retrieve church keys and credit/debit/tax-exempt cards from the previous minister.
- Retrieve any equipment belonging to the ministry such as a laptop or cellphone.
- Have the previous minister remove anything personal from the church computer's hard drive.
- Delete the previous minister's access to all virtual applications, including church phone, website, bank accounts, and credit cards.
- Remove the previous minister's name from all church bank accounts, website, and communications.

When the new minister arrives:

- Set new minister up for access/email/remote desktop access/all printers on the Minister's computer.
- Make the new minister's access/rights the same as the prior minister including:
 - Access to bank accounts
 - Church credit cards
 - Email and web applications
- Collaborate with the new minister on the transition/training of duties to the new minister.

NOTE: If the ministry is hiring a part-time vs full-time minister, some of the additional staff or volunteer responsibilities may become ongoing, which is to be mutually agreed upon by the Board and Minister. The persons responsible for these duties may also be changed.

<https://www.unityuwm.org/openings>