

The Search for a Membership Professional



Best Practices for Unitarian Universalist Congregations

A Resource of the Unitarian Universalist Association of Membership
Professionals

UUAMP

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This manual was inspired by and adapted from the LREDA Best Practices Manual, UU Musicians Network Guide, and the wisdom of the UUAMP Board. We are grateful for all their leadership in the field of Professional Ministry.

This is our first edition. We welcome your suggestions for future editions. Please email your comments to Lori Emison Clair at dcl@ucdsm.org. We plan to release a second version by May of 2015.

The Assumptions of This Guide

Every Unitarian Universalist congregation has its unique character and membership professional needs. However, some assumptions we begin with are:

- The minister's support for the ministry of membership programming and the membership professional is essential.
- A membership professional will work collegially with the professional ministry team and the membership ministry committee.
- A membership professional requires support for growth through on-the-job training, continuing education, leadership development, and sufficient funds to support these efforts.
- A membership professional employed by a Unitarian Universalist congregation should be fairly compensated and treated as a professional staff member whether full-time or part-time.
- A high-quality membership program will be an essential factor in congregational numerical, maturational, and associational growth.

Support for the Search Process

It is important to acknowledge the significance of the process you are about to undertake. A search process is a time of transition for your congregation, which can be stressful. For many of those involved, it will be a first-time experience. For these reasons and more, it is wise to consider obtaining guidance from a professional to assist your congregation. The most helpful person to contact would be the congregational life staff within your district or region. Your district or regional staff has particular expertise in working with congregations around issues and questions in membership.

In addition, the Unitarian Universalist Association of Membership Professionals (UUAMP) can be a resource as you work through the process. UUAMP has many resources on their website (www.uuamp.org), board members available for consultation on process, a mentoring program for new membership professionals, continuing education programs for existing staff, as well as a professional training day each year before General Assembly.

A budget should be developed for the hiring process, which should cover development of a congregational packet, advertisement costs, travel expenses for candidates, as well as the purchase of equipment needed once a candidate is selected. At a minimum, the staff will require a computer with internet access, preferably a laptop with remote access.

Selecting the Members of the Search Committee

Each congregation has its own guidelines for human resources. Working with those guidelines, a search committee should be selected with consideration given to the following.

The search committee can reasonably consist of three to five individuals who have the confidence of the congregation and who understand its membership professional needs. Congregational staff, especially those who will serve in a supervisory position for the membership professional, often take an active role with the committee. However, it should be clear who has the final authority in the hiring process, who will provide direct supervision, and who has authority for termination should the position not be a good fit.

Some individuals to consider for a search committee might be:

- Minister
- Director of Religious Education
- Administrator
- Appropriate professional programming staff
- Board members
- Membership Committee chair
- Key lay leaders in membership and other areas of responsibility such as hospitality, leadership development, adult education, small group ministry, communications, and stewardship
- Long-time leaders of the congregation
- New members of the congregation

When choosing a committee, try to gather a balance of people who reflect not only role diversity, but the diversity of the congregation they will serve.

Gathering Information from the Congregation

Once a search committee has been selected, it is important to have a way for others to provide input into the process. Those most closely working with this new staff need to have involvement from the beginning of the process in order for

them to feel connected with the outcome. Specifically the membership committee or ministry team should have an extensive input due to their intimate knowledge of the strengths, needs, and potential of the current program.

Congregational Mission Review

Your congregation's mission statement articulates why your congregation exists. It may describe its purpose and may include a statement of what you would like to contribute to the larger community or the world. It is the foundation on which all ministry and programming rests. Things to consider as you begin visioning for your new staff position:

- What is the mission of your congregation?
- What does your mission statement say about the ministry of membership?
- What are your membership goals for your congregation?
- How do your membership goals connect with your mission?

Creating a Vision for Membership

After considering how membership intersects with your mission as it exist now. You will want to consider what your future vision is for the ministry of membership within your congregation. You may want to begin with a survey using some of the questions, or with a series of meetings (small or large group) using any one of the models suggested below. Use the questions that seem most appropriate or develop ones that are more suitable for your specific situation.

- What is the meaning of membership in your congregation?
- What are the rights and responsibilities of membership in your congregation?
- What was the most meaningful and informative part of your own personal experience moving through the membership process?
- What would have made it more meaningful and informative?
- What do you imagine for new members moving through the process in the future?
- What do you see as the difference between membership work and membership ministry?
- In what ways does the membership support the mission of the congregation?
- How do you imagine a professional membership staff could better support the mission?
- In what ways could a professional membership staff better support congregational life?

- What are the strengths of your current membership program?
- What do you want to see improve?
- What is required to realize what you envision?

Questions for Specific Focus Groups Membership Committee/Team

We suggest you consider using the questions above with the following additions:

- How do you imagine a membership professional and the membership committee best supporting one another?
- How do you imagine the membership professional and the membership committee best supporting the mission?
- How do you imagine the membership professional and the membership committee best supporting congregational life?

Professional Staff: Minister, DRE, Music Director, Youth Director, and/ or other Programming staff.

We suggest you consider using the questions above with the following additions:

- How does your ministry currently relate to the membership program?
- How does the current membership program support your ministry?
- How could a membership ministry better support your ministry?
- How could a professional membership staff enhance your ministry?
- How could your ministry support a professional membership ministry?
- How could a professional membership staff support congregational life?

Assessing Your True Membership Count

Many congregations haven't considered the importance of keeping their membership list as accurate as possible. Failing to do so before hiring a Membership Professional will be detrimental to this new position. Some of the reasons are:

- The Membership Professional needs to know who active members are in order to know who they are serving. This will allow the new staff person to focus his or her energy on the true members of the congregation.
- If the Membership Professional is the one who cleans the membership list, they will likely be decreasing your membership count. Some may think that this position is shrinking your membership, rather than boosting it.

In addition the congregation would benefit from a clearly defined procedure to determine who is a member and who is not. Once those guidelines are determined they will need to be shared with the congregation either through the creation of a procedure, a policy, or inclusion in the congregational bylaws. One

resource that may assist in this process is: <http://www.uua.org/governance/bylaws/membership/48037.shtml>

Determining How You Will Define Success:

While often a congregation will want to determine the success of a membership professional based solely on if the congregation experiences numerical growth, UUAMP strongly advises a more expansive view of success be considered. We feel the true signs of a successful ministry will more accurately reflect a more comprehensive view of growth if it includes maturational and associational along with numerical growth. Some ways to assess if your congregation is experiencing growth, beyond your certification count provided to UUA each year are:

- Increase in the average service attendance
- Increase in the average children's religious education attendance, and the number of adults that teach
- Increase in the number of adult religious education classes, attendance numbers of the adult education classes, and diversity of adult facilitators
- Increase in program involvement such as small group ministry, caring ministry, and hospitality services
- Increase in shared leaders, which include leadership rotations and succession planning in place
- Increase in leaders representing the congregation in the wider community
- Increased media presence
- Increased number of Facebook shares

When defining success, it is also important to consider there can be many reasons why a congregation does not experience growth. Many of those factors are beyond the control of the professional membership staff. Some examples would be a recession, a transition of minister or other program staff, your building size or other physical limitations, congregational size plateaus, etc. In order for any professional staff to be successful they must be functioning in a healthy system.

Creating Your Membership Professional Position

Prioritize the Qualities and Characteristics Required

Identify the skills, qualities, and characteristics you would most like to find in a membership professional. It is not likely that one person will possess all the characteristics you desire, so it may be valuable to prioritize the ones you see as most critical. Look for someone who possesses the most important ones along with the obvious potential to develop the others. For example, the ideal candidate might:

- affirm and understand Unitarian Universalist purposes, principles, sources, history, and traditions
- demonstrate skill in interpersonal relations and group dynamics
- work well with individuals of diverse backgrounds and personalities
- demonstrate the ability to work collegially with other professionals and leaders in the congregation
- show personal warmth and a pastoral presence
- be self-motivated, well-organized, good with details, and able to follow through and delegate responsibilities
- set appropriate boundaries and not take conflict personally
- show discernment in relations with congregational entities
- recognize and prioritize the importance of continuing education and professional growth
- exhibit skills in foreign language, software, and computers

Traditional Areas of Responsibility

Welcoming Visitors

- Greet and welcome visitors on at services(s)
- Develop the visitor/membership brochure
- Publicize visitor programs
- Coordinate visitor programs
- Evaluate the visitor program

Membership Pathway

- Formulate membership program goals
- Create a welcoming and nurturing environment
- Design membership program
- Publicize membership program
- Encourage membership engagement
- Evaluate the membership program

Volunteer Coordination

- Recruit for volunteers for visitor and membership programs
- Orient volunteers

- Provide ongoing support for volunteers
- Create volunteer appreciation programming

Program Administration

- Acknowledge visitors: phone or card after first visit
- Maintain visitor records
- Manage the membership database
- Maintain financial records for the membership committee
- Attend staff meetings
- Attend membership advisory committee meetings

Professional Growth and Continuing Education

- Reading and reflection
- UUAMP continuing education programming
- UUAMP Annual Professional Day
- District/regional/national conferences

Division of Responsibilities

You will be assessing your present needs and projected visions to determine the responsibilities the membership professional will have now and how that might change in the future. However, membership leadership is too important and demanding to be left to one person. When a membership professional is hired, that person could be working in partnership with other staff, volunteers, and particularly the membership committee. Responsibilities must be carefully described and accountability made clear. Professionals and staff work more effectively when other staff and volunteers understand each other's roles and complement their talents.

Combining Staff Positions

Some congregations have added hours for the ministry of membership to an existing staff position, such as administrator or communications staff. There are certainly examples where this has been successful, but there are also reasons for concern. If the individual selected is given the position for convenience rather than being a good match for the ministry of membership or if the staff person is not given sufficient time to focus on each of their roles, they will be unsuccessful. It is also essential to carefully consider the staff person's qualifications for the duties of both staff positions.

Selecting a Position

(This section has been adapted from religious education staffing developed by Jan Gartner, UUA Professional Development Associate, jgartner@uua.org with assistance from John Cavallero and Rev. Jude Geiger April 2014)

Given the diverse nature of membership programming and congregational context, it is unrealistic to provide a precise “formula” for hiring a membership professional. We hope the information below enables a congregation to have clarifying conversations and to make informed decisions about staffing levels.

Factors to Consider

- Congregation size (This includes members and friends)
- Job scope of the membership staff (other program areas of responsibility)
- Number of worship services or other distinct programming times presence is required
- Level of volunteer and ministerial support
- Staff supervision responsibilities

Congregation Size and Hours

Some tasks are dependent on size of the congregation, e.g., volunteer recruitment. Other responsibilities take roughly the same amount of time, whether one is serving 5 members or 500 – for instance, writing a newsletter article or planning a volunteer training.

Job Scope

Take a moment to consider where your position falls on the continuum below, relative to the three job scope levels outlined: Membership Coordinator (Basic), Membership Director (Classic), and Director of Congregational Life (Comprehensive). Nearly all positions are “hybrids.” The descriptions below are not intended to represent exact job descriptions.

Membership Coordinator:

This position is primarily an administrative role supporting a membership program and typically works independently on well-defined tasks cooperatively with ministerial and lay leadership.

Responsibilities Include:

- Visitor support/point of first contact
- Coordination of new member classes
- Volunteer recruitment and support
- Record-keeping
- Policy implementation
- Opportunities for regional connection and development with peers

Coordinator positions might be most appropriate for smaller congregations or mid-size congregations/programs with strong program support from the minister and/or exceptional volunteer support.

Membership Director

This position works autonomously with a moderate level of authority and expectations of collaboration with minister and other staff. Overall accountability for responsibilities listed above, plus attending to many or most of the following:

- Program policy development
- Budget oversight
- One additional area of programming supervision (small group ministry, stewardship, communications, adult education, etc.)
- Opportunities for national professional development
- Service to the regional UU membership community

A Membership Director position might be most appropriate for a small congregation with a strong commitment to growth, a mid-size congregation with a solid commitment to membership engagement, or a large congregation with strong ministerial support and/or exceptional volunteer support.

Director of Congregational Life (DCL)

This position is a well-developed membership ministry staff position that goes well beyond visitor and new member programming to provide overall congregational leadership, including integration with multiple areas of congregational life. This position works in collaborative relationship with staff team and operating with a high level of authority within the program area. This position also attends to or delegates most of the membership coordinator and membership director tasks and will include many or most of the following:

- Membership engagement and tracking
- Strategic planning for growth

- Leadership development
- Collaborative staff team planning and congregational management
- Developing and implementing innovative programming models
- A second area of programming supervision
- Advanced professional development
- Leadership in the wider regional and national UU communities

A Director of Congregational Life position might be most appropriate for a small congregation with an exceptional commitment to vibrant and innovative membership engagement programming, a mid-size congregation with a commitment to innovation and growth, or a large congregation/program with expectations of innovation and a well-integrated, highly-developed programming.

Member Size	Memb. Coord.	Memb. Director	DCL
0-100	10	15	Not recommended
100-250	20	20	20
250-400	25	25	30
400-600	30	30	40
600+	Not recommended	40	40+ Staff extender

Accountability

UUAMP highly recommends that the Membership Professional report to a minister. UUAMP feels that the future growth of the Unitarian Universalist movement requires an understanding that the work for a membership staff is not administrative, but rather a ministry. It is only when positions are filled with individuals with the skill to serve in this way and are treated with the respect of a ministry that we will experience the kind of numerical, maturational and association growth we feel is possible.

Financial Responsibilities of the Congregation

The congregation should develop a long-range plan for fairly compensating the membership professional. Ongoing expenses related to a professional membership ministry include:

- Staff salary and benefits
- Professional development
- Professional organization membership fees
- Resources for membership events

For more specific information on this step, consult your district or region compensation consultant, who is available to assist you with compensation questions.

Fair Compensation

The UUA guidelines are designed to help congregations set initial salaries and benefits for professional employees and to provide a basis for ongoing salary administration. However, ultimately, each congregation is responsible for determining levels of compensation and benefits for its staff. The guidelines facilitate the informed exercise of that responsibility. At the time of this publication, UUAMP is working with the UUA Compensation staff to reevaluate the placement and fair compensation guidelines to more accurately reflect the ministry of membership role as it is currently functioning in congregations. It is our hope that in the future you will find the professional membership staff position listed as a ministry staff position.

Salary:

A complete set of guidelines based on geographical indices are available on the UUA website at <http://www.uua.org/careers/compensation/fair/>.

Other factors to be considered are:

- Length of service in a congregation
- Length of service in the denomination
- Relevant work/life experience
- Academic experience
- Progress in mastering the requirements of the position
- Participation in programs for professional development, such as certification
- Adjustments to reflect cost-of-living changes

The compensation guidelines are designed for full-time employment. The majority of membership professionals serve in part-time positions and their salaries and benefits need to be pro-rated. Those congregations for which immediate adoption of the guidelines is not financially feasible, but wish to move toward them are encouraged to develop a three- to five-year process for annual increments. District or regional compensation consultant can provide more

detailed information on UUA compensation.

Professional Expenses

Reimbursable expenses include travel, equipment, books, periodicals, meetings with colleagues, workshops, course and conference expenses, and professional dues.

Professional expenses should be included as a line item in the congregation's budget and listed in such a way that they will not be considered or confused with salary. The professional expense budget should be determined along with the establishment of a salary and should be updated annually. Professional expense requirements vary from congregation to congregation and region to region, with differing responsibilities, job descriptions, and other variables. It is necessary for membership professionals and congregations to establish a clear understanding of what professional activities will be covered by this budget item.

It is important to understand that for a membership professional, engagement with the professional association and continuing education are vital parts of the work and should be considered when determining the professional expense amount. Listed below are some the professional activities that might be included in this category for your membership professional:

- Workshops and seminars for continuing education
- Meetings of district or regional teams or clusters of ministry professionals
- District or regional trainings or conferences
- UUAMP meetings and retreats
- Certification requirement
- UUAMP Professional Day at Pre-GA
- General Assembly

Filling a Vacated Position

If your congregation is replacing a membership professional, it is important to arrange for an exit interview with the former membership professional and the person(s) to whom s/he was accountable. This is done routinely for clergy and is important for all professional ministry staff. No matter what the reason for the departure, this is an important step. The purpose of the interview is to give perspective on former relationships and practices and to inform the search committee as they seek to hire a new membership professional. Your district or regional staff may be available to advise and or conduct this interview.

Interim or Acting Membership Professional

If there has been a prior membership professional, you may want to reflect on whether this new hire will be a temporary one until a permanent staff person can be found. The options most commonly considered are having a paid interim or paid acting membership professional. In most cases, an interim position cannot be hired, but rather it is a temporary position designed to help a system do the work they need to do to get ready for a new staff person. Someone who is not staying is free to be more honest and bold in healthy change-making. An acting position can be hired if the person is deemed a good fit. If a professional has been in a system for a long period or time or was particularly charismatic, it is suggested that a congregation choose an interim position.

Applicants From Within the Congregation

It is common practice for the congregation to hire someone from within the congregation as the membership professional. If the best candidate is a person who has been active in the membership program, it is important that the prospective candidate, the search committee, and the minister discuss the potential changes that may occur if s/he becomes staff. Depending on the circumstances, there are advantages and disadvantages that should be carefully explored.

It May Be an Advantage if the Person From Within:

- has knowledge of Unitarian Universalism
- understands the congregation's organizational system
- is familiar with the congregation and the members of the staff
- is familiar with the culture and structure of the membership program
- is familiar with the membership curriculum and the volunteers
- is likely to be more invested in the program and the people

It May Be a Disadvantage if the Person From Within:

- loses the benefits of congregation membership such as voting or serving on other committees
- experiences changes in the relationship with the minister (For example, the minister may no longer be available to that person for pastoral care)
- experiences changes in personal relationships with members as a result of his/her new role as staff
- experiences difficulty in setting boundaries and limits on work time
- lacks objectivity about what needs to change or be improved
- experiences difficulty with being evaluated

If the position is part-time, a discussion of how this person understands the new role is important. There must be agreement and clear distinction between paid staff time and volunteer time by an employee. It is best if the hired membership professional does not volunteer any time in the membership program.

Members of the membership committee and others in the congregation will need help in understanding the transition from the role and privileges of a member to the role and responsibilities of a staff member. A formal ceremony of some kind such as a service of installation or covenanting assists other members in accepting one of their peers as a professional staff member. Any agreements of the transition from member to staff process should be put in writing as part of the letter of agreement.

After a careful processing of the pros and cons, many who have been hired from within decide to maintain their membership status. Others choose to resign their home congregation's membership and join the Congregation of the Larger Fellowship (CLF) or a nearby congregation if one is available.

After carefully consider the pros and cons of inviting applications from within your own congregation and, if you believe there are possible candidates, begin by publishing a notice in your congregation's newsletter. If hiring from within the congregation is not an option, take the following steps:

- Publicize your job opening on the UUA website
- Publicize through UUAMP
- Publish a notice in your district or regional office for their newsletter
- Send notices to nearby Unitarian Universalist congregations, asking them to publicize your job offer to their membership
- Send notices to nearby theological schools and their education departments
- Identify the geographic area from which a likely prospect might reasonably commute and make sure your advertising covers those areas

Elements of the Job Description

Name and Address of Congregation

Size of Congregation

Title of Position: Make it descriptive of the functions and role within the congregation. Titles commonly used include: Membership Coordinator, Director of Membership, Director of Congregational Life

Time Frame: Will it be a full-, half-, or less than half-time position? Will you be using hours or units? You may wish to use both units and hours.

Goal: Briefly state the overall purpose of the position as it relates to your congregation's mission.

Statement of Accountability: In the organizational structure, to whom does the employee ultimately answer? Will there be a supervisory body or person? How frequently and in what manner will the employee report? How often will

evaluations occur?

Responsibilities: Describe the categories and population for which the person in this position will have responsibility. Be sure to include only what can be accomplished realistically within the time frame of the position as you have designed it and for the compensation that has been designated.

Experience, Knowledge, Skills, and Abilities: State the kinds of experiences, academic background, knowledge, skills, and abilities needed to do the job you want done. This is especially important when advertising the position. Be as clear as you can about what you are seeking.

Compensation:

Salary: If you do not wish to state a specific figure, indicate a range and whether it meets the fair compensation guidelines of the UUA.

Benefits: Optional benefits may be vacation, insurance, and retirement. Specific information on benefits is usually written in the hiring agreement.

Professional Expenses: These are non-taxable funds to be used by the membership professional for such things as continuing education workshops or courses, professional organization conferences, UUA General Assembly, travel, books and periodicals.

Screen the Applicants

It is the responsibility of the search committee to select the most viable candidates from the applications received. If applicants do not meet your qualifications, letters should be sent immediately expressing appreciation for the inquiries and indicating clearly that they will not be asked to interview. If a person from your congregation has applied but will not be interviewed, the chair of the search committee should plan to meet with or contact that person directly to thank her/him for applying.

Questions for the Candidates

You will learn a great deal about the candidate from the application/resume submitted. The interview is an opportunity to see style, personality, and the ability to be responsive. We urge you to adapt questions so they are specific to your congregation. Some of the following questions may elicit the most useful information:

- What is your experience with Unitarian Universalism?
- How would you explain Unitarian Universalism to someone who doesn't know anything about it?

- What do you feel is the importance of membership within a congregation?
- What is it about this job that interests you?
- What life experiences will be most helpful to you in the role of membership professional?
- What do you think is the optimal relationship between the minister and the membership professional?
- What is the greatest strength you bring to this work?
- What do you expect will be most challenging for you about this work?
- What would you describe as your most creative effort in previous employment?
- Describe a time when you experienced conflict and how you were able to resolve it.
- Why do you want the job of membership professional in this congregation?
- What are your goals for your professional development?
- What strengths do you see in our program? Weaknesses?
- How do you work under pressure?
- If you are a current member, how will you create boundaries to congregants as a staff member?
- In what kind of supervisory situation do you work best?
- What experience do you have working with volunteers?
- Describe your strategy for recruiting volunteers.
- How would you take care of yourself to avoid burnout? What help would you need?
- What is your experience in working in a staff team?
- Do you have any experience working in a faith community?
- If you do not have experience working in a faith community, how do you think it might be the same or different from your other experiences?
- Are you comfortable interacting with people with mental illness or physical limitations?
- Tell us about your comfort level with technology: computers, email, Excel, Microsoft office, and social media?
- What would you like to ask of us?
- Are there any things we didn't touch on that you would like to specifically bring to our attention?
- Why should we select you as our membership professional?
- Is there anything about you that you believe is important for us to know that we have not asked?

In addition to selecting the best questions for your congregation from above, it may be useful to develop some scenarios and do some role-playing with the candidate.

Format for the Interview

It is recommended that viable candidates have two interviews with the search committee. If necessary, the first interview may be done by phone with an in person interview as follow-up. However, as this position is so dependent on interpersonal skills, it is ideal that both interviews be in person. It is critical that there are complete notes of the questions and the applicant's responses.

If the candidate is new to the building or the area, it is important to provide a tour. If a candidate is coming from out of town, make arrangements for housing and travel to interviews.

In order to make the best use of the time of the search committee, it is wise to schedule two or three interviews on the same day, leaving at the very least a 30 minute break between the candidates. At the conclusion of the final interview for the day, the search committee should review the applicants, record observations and impressions, note any follow-up questions that may need to be asked and assign members to make follow-up calls.

Identify the Final Candidate

At the conclusion of all the interviews, rank the candidates and assign a person to call the references for your top three candidates. The same questions should be asked of each reference, with the answers noted in writing. After the references are called, the search committee should hear the results and deliberate until there is consensus on the final candidate. As it is natural for a candidate to list as references those people with whom s/he has had successful relationships, it is wise to go beyond this step. Before extending an offer, we believe that you should consider a complete reference and background check. Advice on this important procedure is available from the Transitions Office in the Ministry and Professional Leadership staff group at the UUA.

Reference Checks

When conducting personal reference checks, it is first important to give a brief overview of the position the candidate has applied for.

Some sample reference questions might include:

- How warm and welcoming are they?
- How does this person relate to others who are different than them?
- Do they work independently?
- Do they have high energy?
- How does this person manage multiple projects/tasks/committees/etc.?
- How does this person work with and collaborate with other staff?

- Is this person reliable, responsible, and pleasant to work with?
- How do they handle conflict?
- Do they delegate effectively?
- Does the candidate have problem solving skills?
- Does the candidate have the ability to remain non judgmental when confronted with difference?

After a decision has been reached:

- offer the job to the final candidate by phone
- confirm her/his willingness to accept the job
- arrange for a meeting to adjust the job description
- draft a letter of agreement or contract

Before a public announcement is made, all other candidates should be contacted by telephone to thank them for their interest and to let them know that another candidate has been selected and will be announced to the congregation. A follow-up letter should be sent within one or two days.

- Write a letter from the board and search committee to the congregation introducing and celebrating the new membership professional.
- Plan an event that will provide an opportunity for the congregation to meet the candidate.

Adjust the Job Description

The search committee, in cooperation with the board or its representatives, can review and make adjustments to the job description so that the document is accepted by all involved. If this is part-time employment, it is particularly important the responsibilities listed can be accommodated in the time of service to which all have agreed. If your congregation intends or expects that a position will eventually grow into one of greater responsibility, that understanding should be included in the job description to avoid misunderstandings at a later date. Best practice dictates clear, written job descriptions that are widely understood and agreed to by all parties. Provide a realistic picture of the job as possible. Too few hours for the job description may result in resignation. Unrealistic job description for a membership professional correlates directly with a shortened tenure.

Letter of Agreement

This is a binding document to which the job description should be attached. Both

the congregation and the membership professional are ethically bound to abide by the conditions of this agreement. Depending on the congregation and its resources, the following elements should be included:

- person or group to whom the membership professional is accountable
- evaluations process
- starting salary as well as the timing and method of increments
- amount of professional expenses
- amount paid for medical insurance, retirement, and any other benefits
- length of time the agreement is in effect. If this is an acting position it must be written into the contract whether this person will be considered for the permanent position. Common practice is that an interim remains for one year and then the contract can be renewed for a second year.
- time off: Sundays, vacation, professional development
- procedures for voluntary and involuntary departure, dependent on the state you live in
- expectations for relations with other professional staff
- working conditions such as nature of office space, computer, phone, office assistance, etc.

Public Ceremonies

It is becoming increasingly common for congregations to publicly welcome newly hired membership professionals, whether full-time or part-time. It is an opportunity to articulate the promise of new relationships and responsibilities. To involve the entire congregation in this ceremony can help support the notion that membership is a ministry of the congregation and an inherently important part of the life of a congregation that is or seeks to become vital, healthy, and growing.

Support for the Membership Professional

Clarity from the beginning exactly what the expectations are and where and from whom the employee can seek confidential advice, support, and feedback. Address important issues as they arise. Major problems are best discussed immediately, not put aside until the annual review.

Encourage Professional Development: Provide the employee with the means to draw on opportunities for professional growth including workshops, seminars, and conferences.

- There are many programs throughout the UUA offering meaningful continuing education opportunities that would benefit professional membership staff. We encourage all to seek out opportunities that best suit their needs and interests.

- UUAMP provides book discussion groups, webinars, as well as an annual Professional Day at GA.
- UUAMP, with the support of a Unitarian Universalist Funding Grant and in conjunction with the UUA Office of Growth, is designing a professional certification program for staff. The program will offer a process that provides concrete and denominationally uniform criteria to be used in the membership professional staff development process.

Show Appreciation: This is simple but invaluable. Offer genuine praise and provide public acknowledgement that the employee's contribution to the life of the congregation is valued and appreciated.

Provide for Salary Increases: There are three distinct types of salary increases, each to be addressed separately.

- Cost of living increase—given to all staff each year within budget parameters. Unless the individual annual review results in a warning or an imposed probationary period. If after such time the probationary period has produced positive results, the increase may be granted.
- Merit—according to Ralph Mero, Director of UUA Office of Congregation Staff Finances, since 1995 the denomination has urged its member congregations to annually review and adjust the congregation staff salaries according to merit, not just the cost of living. Merit increases acknowledge growth in skills or performance over time.
- Increased responsibilities—when the number of services is increased, new programs added, additional staff to supervise, or increased administrative duties.

Membership Advisory Committee

There are differing models and names for this group, but the intention are to act as a support group for the membership professional. Possible responsibilities include:

- Providing an additional communication channel between the membership professional and the congregation.
- Conveying feedback on programming performance and consulting on an appropriate response by the membership professional.
- Acting as a sounding board so that the membership professional can discuss problems and frustrations candidly and in confidence.

- Working on plans for continuing education and professional development.

Under no circumstances should this committee substitute for direct discussions between the membership professional and other staff or members; or between the membership professional and the congregation. Members of the congregation and staff are encouraged to speak directly with each other to pass on a concern, an idea, or a compliment. The length of service on either of these groups should be long enough so members get to know the membership professional.

Evaluations

UUAMP encourages a process of annual evaluations of professional staff as well as programming. An appropriate evaluation process is a forward-looking, and positive effort to examine the planning and work of professional staff and existing programming. The aim of identifying and praising areas of strength and developing strategies for improvement.

In addition, it is useful for the membership professional to create personal, professional, and program goals for ministry in partnership with the senior minister.

Unitarian Universalist Association of Membership Professionals

Encourage your membership professional to join UUAMP, the Unitarian Universalist Association of Membership Professionals, which is an affiliate organization of the UUA.

The Mission of UUAMP is to develop and support the ministry of membership through professional development and collaboration.

Services UUAMP provides includes:

- Continuing education webinars and book discussions
- New staff mentoring
- Professional Day held annually at GA
- Membership resources on www.uuamp.org

Sample Employment Agreement for a Full-Time Membership Professional

Agreement made
between _____

—

(congregation)

and

_____ (membership professional)

1. The congregation, acting through its governing body, employs _____ as membership professional under the terms set forth in this agreement, who accepts such employment under the stated terms.
2. The membership professional will carry out the mutually agreed upon tasks as stated in the attached job description
3. The membership professional is accountable to the minister.
4. The membership professional will work in cooperation with the membership advisory council in matters of membership program policy.
5. The congregation agrees to pay the membership professional an annual salary of \$____
6. The congregation agrees to pay the medical insurance for the membership professional in the amount of \$ _____ monthly. Reasonable sick leave for short-term illness does not affect compensation. In the event of a long-term disability, the congregation agrees to continue compensation for 90 days, after which it is anticipated that long-term disability insurance benefits would become payable.
7. The membership professional is employed on an annual basis for _____ hours.
8. The membership professional will have _____ Sundays off over the course of the year, inclusive of personal and professional responsibilities,
9. The membership professional will have _____ days of vacation per year.
10. The membership professional will be responsible for administering the membership program and professional expense budgets. This agreement will be reviewed annually and will be in effect until amended or retired by the mutual consent.
11. The congregation and the membership professional agree to abide by the code of professional conduct and guidelines set forth by the Unitarian Universalist Association of Membership Professionals.

12. Evaluations of personnel and programs based on mutually established goals will be conducted yearly through the minister.

Signature of Minister

Date

Signature of Membership Professional

Date

Sample Annual Employment Review For Membership Professionals

Name and Position Title _____ Date hired _____

Review period _____ Date of last review _____

The following items are to be completed by the membership professional:

Does your current job description/contract adequately match the work which you are required to do? If not, how should the job description be adapted?

What have been your accomplishments and successes in the past year?

Are there any particular aspects of your work that you especially enjoy or find rewarding? If so, what are they?

Are there any particular aspects of your work that you do not especially like? If so, what are they? What changes would you like to see with regard to these concerns?

Is there any way in which the supervisor could be of better help to you in your work? If so, please describe.

Is there any way in which your fellow staff members and lay leadership could be of better

What goals would you like to set for yourself for the next year?

In general, how would you evaluate your performance over the past year? To

what extent were last year's goals met?

Is there anything in particular which you would like to discuss with the reviewer?
If so, please describe.

MEMBERSHIP

PROFESSIONAL _____

The following questions are to be completed by the reviewer:

Does the current job description/contract adequately describe the work expected of the membership professional? If not, how should the job description be adapted?

In general, what is your evaluation of the membership professional's performance over the past year? To what extent were last year's goals met?

Has the work been done in a manner that facilitates good relationships on the part of co-workers? If not, what improvements should be made?

Evaluate how well the membership professional interacts with members of the congregation.

If applicable, evaluate how well the membership professional supervises the work of other persons.

How could you be of better help to the membership professional?

Is there anything in particular which you would like to discuss with the membership professional? If so, please describe.

MINISTER _____

The membership professional and the minister are to meet and discuss the comments on the previous pages. After the conversation, each should respond to the following questions:

What goals have been set for the membership professional for the next year?

Has this evaluation process been beneficial to you? If not, how could it be improved?

MEMBERSHIP PROFESSIONAL'S RESPONSE:

MINISTER'S RESPONSE:

MEMBERSHIP PROFESSIONAL'S SIGNATURE

MINISTER'S SIGNATURE