

Pastoral Relations: Engaging and Supporting

March 2015



The United Church of Canada
L'Église Unie du Canada

Pastoral Relations: Engaging and Supporting (March 2015)



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About This Resource

This resource expands on the policy found under section I. Pastoral Relations in *The Manual*. All references to *The Manual* are to the 2013 edition.

This resource contains

- policies and procedures that must be followed
- best practices that provide information, guidance, and advice on the best ways to live out mandatory policies and procedures, which you are encouraged but not required to follow

This edition of the *Pastoral Relations: Engaging and Supporting* resource replaces the October 2013 edition.

Further resources that are referenced may be found on the United Church website (www.united-church.ca).

Please note the following changes:

- Details have been added to financial incentives for settlement (pages 32–33).
- The Disengaging Policies: Retirement section has been added (page 45).

Living Out God's Mission in the World

The policies and procedures of The United Church of Canada exist to support the church in living out God's mission in the world. The pastoral relations policies and procedures aim to support ministry personnel and local ministries as they engage in new pastoral relationships, live out pastoral relationships and ministries in action, and change or end pastoral relationships.

The Pastoral Relations: Engaging and Supporting Resource

Policies and Procedures

The related policies about pastoral relations may be found in *The Manual, 2013*, in section I. Pastoral Relations.

What is in this resource?

This resource is divided into two main sections that correspond to the policies in *The Manual*:

Connecting policies:

- Needs Assessment
- Search and Selection
- Transfer, Settlement, Call, and Appointment
 - Covenanting
 - Settlement to Presbytery-Recognized Ministries

Supporting policies:

- Remuneration of Ministry Personnel
 - Moving Expenses
 - Manse
- Leaves
 - Maternity Leave and Parental Leave
 - Sabbatical Leave

Who is this resource for?

This resource is for ministry personnel who are settled, called and settled, or appointed to local ministries, and for local ministry leaders, presbytery leaders, and Conference leaders who are responsible for ensuring that these policies are lived out.

Other Resources

Other pastoral relations resources that ministry personnel, presbytery leaders, and Conference leaders may need throughout their leadership include

- *The Manual*
- Financial Handbook for Congregations
- Minimum Salary and Allowances Schedule for Ministry Personnel (revised annually)
- Benefits for Active Members: Summary of Coverage
- Designated Lay Ministers resource
- Admission to the Order of Ministry resource
- Interim Ministry resource
- Congregational Designated Ministers resource
- Licensed Lay Worship Leaders resource
- Sacraments Elder resource

Each of these resources is available on the United Church website (www.united-church.ca). Use the search box in the top right corner of the website and enter the title of the resource, or select Handbooks and Guidelines under the Administration tab.

CONNECTING POLICIES

Needs Assessment

Living Out God’s Mission in the World

The needs assessment policies and procedures aim to support pastoral charges that are considering a change in pastoral relations. The purpose of the needs assessment process is to create a snapshot of the pastoral charge—the faith community and resources—in order to make a recommendation for what future ministry leadership the pastoral charge needs to live out God’s mission in the world. The responsibility to conduct a needs assessment belongs jointly to the pastoral charge and the presbytery.

Policies and Procedures

The policies about needs assessment may be found under Pastoral Relations in section I.1.5 (I.1.5.1–I.1.5.9) of *The Manual*. This pastoral relations resource includes additional policies and procedures regarding needs assessment that must be followed.

The process for requesting the presbytery to declare a vacancy (a need for a paid accountable ministry position) in a pastoral charge is called a needs assessment. It is an evaluation of the ministry in the pastoral charge. In exceptional circumstances, a pastoral charge may be able to identify to the satisfaction of the presbytery a need for a paid accountable ministry position as a result of some other form of assessment.

The presbytery must initiate a needs assessment if the pastoral charge or ministry personnel is considering changing the terms of the pastoral relationship to the disadvantage of either the pastoral charge or the ministry personnel. If the ministry personnel, pastoral charge, and presbytery all agree to the proposed change, it is not considered to be to the disadvantage of any party.

For more information how to request a change in pastoral relations, see section I.3.1 of *The Manual*.

The convenor of the presbytery Pastoral Relations Committee, or their appointee, is responsible for chairing every pastoral charge meeting called to discuss the pastoral relationship. For more information on meetings, see sections B.5.4.2 a and I.3.1.4 b of *The Manual*.

The basic requirements of the needs assessment process continue to be quite minimal. The process set out below must be followed.

1. The presbytery is responsible for initiating a needs assessment process, at its own initiative or at the request of a pastoral charge, the governing body of a pastoral charge, or a ministry personnel. (The list of situations that would cause the presbytery to initiate a needs assessment can be found under Pastoral Relations in section I.1.5.2 of *The Manual*.)

The actions of a court, i.e. “initiate” and “elect,” are accomplished by making motions. For example, for a presbytery to initiate a needs assessment, it would have to make a motion similar to the following:

“That the Pastoral Relations Committee of Any Presbytery establish a Joint Needs Assessment Committee at Any United Church effective immediately.”
2. The needs assessment process is conducted by a committee called the Joint Needs Assessment Committee—joint between the pastoral charge and the presbytery.
 - (a) The presbytery must elect two representatives to serve on the Joint Needs Assessment Committee.
 - (b) The pastoral charge or its governing body elects representatives to serve on the Joint Needs Assessment Committee.
3. The first meeting of the Joint Needs Assessment Committee is convened by one of the representatives from the presbytery.
4. At the first meeting, the Joint Needs Assessment Committee must decide on quorum for the committee. Quorum must be at least two people, including one person from the pastoral charge and one person from the presbytery.
5. The Joint Needs Assessment Committee must decide on its own process, and may delegate tasks beyond its membership. The needs assessment process must
 - (a) study the ministry personnel needs of the pastoral charge;
 - (b) gather information about ministry personnel needs in a way that is open and allows for the congregation to participate;
 - (c) analyze the information gathered;
 - (d) prepare a report that includes the following information:
 - (i) a profile of the community of the pastoral charge;
 - (ii) a description of the ministry of the pastoral charge;
 - (iii) the resources available to the pastoral charge, including a manse report, if applicable;
 - (iv) the ministry personnel position descriptions on which the committee has made recommendations;

- (v) the skills and knowledge required of ministry personnel; and
 - (vi) the terms that may be offered to implement any recommendations; and
- (e) make recommendations to the governing body about the pastoral charge's ministry personnel needs and/or the existing pastoral relationships.
- 6. The Joint Needs Assessment Committee notifies the governing body when the needs assessment report is completed.
- 7. The governing body circulates the report and a notice of meeting to all members of the governing body, including all ministry personnel in the pastoral charge. The governing body must give members and ministry personnel a minimum of two days to read and consider the report before the meeting.
- 8. The Joint Needs Assessment Committee presents its report to the governing body. The governing body makes a decision on each of the recommendations made by the Joint Needs Assessment Committee.
- 9. The governing body sets a date for a meeting of the pastoral charge. The pastoral charge receives a summary report, the recommendations of the Joint Needs Assessment Committee, and the decision of the governing body. The full Joint Needs Assessment Committee report is available on request. The notice of meeting and summary report is given out in the following order:
 - (a) to all ministry personnel in the pastoral charge, and, at the same time, to the secretary of the presbytery; and
 - (b) to the members of the pastoral charge.
- 10. The notice of meeting is read during public worship on two Sundays. After the meeting notice has been read on the second Sunday, the meeting may take place on the next day (Monday) or on any day after that.
- 11. The pastoral charge must make a decision on each of the recommendations of the Joint Needs Assessment Committee.
- 12. Once the pastoral charge has made a decision on the recommendations, further action is necessary at the same meeting of the pastoral charge.
 - (a) If the decision is to request the presbytery to declare a vacancy for a paid accountable ministry position, then the pastoral charge needs to elect, or authorize the governing body to elect, members to a Joint Search Committee.
 - (b) If the decision is to request that the presbytery appoint a supply minister for up to one year, then the presbytery may act on the request and
 - (i) appoint a supply minister; or
 - (ii) direct the pastoral charge to recommend a supply minister to the presbytery for appointment. In anticipation of this direction, the pastoral charge may elect

members to a Joint Search Committee, or request the governing body to search for and recommend a supply minister for appointment.

- (c) If the decision is to request that the presbytery appoint an interim minister, the pastoral charge must elect, or authorize the governing body to elect, representatives to an Interim Ministry Transition Committee.
 - (d) If the decision is to request the presbytery to approve a change in terms of call for the ministry personnel of the pastoral charge, the pastoral charge must elect, or authorize the governing body to elect, one or more representatives to confirm terms with the ministry personnel and the presbytery.
13. The governing body must immediately notify all ministry personnel in the pastoral charge and the presbytery of its decision.

Best Practices for Needs Assessment

This section provides information and guidance to support pastoral charges and presbyteries working together to assess the ministry needs of faith communities. You are encouraged but not required to follow the best practices described here.

The goal of the Joint Needs Assessment Committee is to make a recommendation about the ministry needs of your pastoral charge. The report is supposed to be a snapshot of the current state of the faith community and ministry needs of the congregation.

Your pastoral charge is free to appoint as many members to the Joint Needs Assessment Committee as it deems necessary to represent the community; between four and ten members makes a functional committee. In a pastoral charge with two or more congregations, there should be representation from each congregation.

During the first meeting of the Joint Needs Assessment Committee, the committee sets the quorum for the group and decides on how to consult with the congregation around ministry personnel needs. The committee is free to assign tasks to people outside the membership of the committee, if it is necessary or helpful. The illustration on the following page shows the information that you will need to consider in order to write the needs assessment report. The same questions can be used as a starting point for wider consultation with your congregation.

The community of the pastoral charge

Who are we as a church family? What kind of community do we live in? How do we fit in our surrounding community? Are there specific ministry needs in the community? Are we meeting those needs? What kind of ministry personnel leadership do we need to support our mission within the surrounding community?



The resources of the pastoral charge

What type of building do we worship and study in? Do we own, rent, or lease our space? What contributes to the financial well-being of our pastoral charge? Do we foresee any significant changes in our finances over the next three to five years? Do we have a stewardship plan? Do we need leadership in this area?

The ministry personnel position descriptions

Is this a full-time or part-time position? What is the focus of the work? Is the position part of a team, or is it a solo ministry?



The ministry of the pastoral charge

What is the focus of ministry at our church? How would we describe our church theologically? Are the spiritual needs of different groups (generations, interests, etc.) being met? How do we want to focus ministry personnel leadership over the areas of worship, pastoral care, education, program management, and social justice?

Terms of the ministry personnel position(s)

What range for salary and benefits will we provide?

Skills and knowledge required of the ministry personnel

What skills does our congregation most value in ministry leadership? Do we want to expand our ministry in any way that would require new skills? Are we specifically seeking an ordained, diaconal, or designated lay minister? Are we seeking one or more than one ministry personnel to serve our pastoral charge and surrounding community?

Consultation

It doesn't need to take longer than an afternoon or evening to consult with your congregation. Even a survey can be given out with the bulletin on Sunday morning and collected during coffee hour. You may want to focus the time with the congregation on a particular area, or ask broad questions about the ministry needs in general. Some options for consultation methods include

- surveying: paper survey, electronic survey, in-person survey
- phone interviews
- face-to-face conversations: one large group, small group conversations, or focus groups
- identifying a group of people in your congregation as listeners or surveyors and asking them to speak with as many people as possible about a specific set of questions or ideas and report back to the committee

Try to plan your congregational consultation in such a way that it is easy for everyone to participate, not just people who are already leaders in the congregation. It is important to hear from everyone: youth, young adults, children, adherents, seniors, people who only attend on Sunday, families who have come to the church for all of their life passages—weddings, baptisms, funerals—but don't attend regularly.

A good resource for large group conversations is Juanita Brown's *World Café: Shaping Our Futures through Conversations That Matter*.

Confidentiality and Conflict of Interest

As a participant in the Joint Needs Assessment Committee, it is important to be mindful of the issues of confidentiality and conflict of interest.

Confidentiality in the needs assessment process means that no individual should be recognizable in a comment or in summaries of information

Conflict of interest may be monetary or non-monetary.

- A monetary conflict arises where the committee is considering a decision that may have a monetary effect, either positive or negative, on a member of the committee or a person close to the member (relative or friend).
- A non-monetary conflict arises in any circumstance where a member of the committee is constrained in any way from acting in the best interests of the United Church. That could occur when a member of the committee or person close to the member stands to gain a benefit in some non-monetary way from a decision that the committee is considering.

Needs Assessment Report

The needs assessment report does not need to be more elaborate than the template found below. You may write a longer, more detailed report, but it isn't always necessary. It is important to remember that the purpose of writing the needs assessment report is to present an honest snapshot of your faith community to support the recommendations about ministry personnel needs that you are making to the governing body and pastoral charge.

Joint Needs Assessment Report

Part A: Parties to the Needs Assessment

Name of Pastoral Charge: _____

Presbytery/District: _____

Conference: _____

Part B: Needs Assessment Report Summaries (150–500 words)

1. Community of the Pastoral Charge (regional demographics, size of community where the pastoral charge is located, social and economic base, specific ministry needs of surrounding community)
2. Ministry of Pastoral Charge (congregation size, demographics of pastoral charge members, mission or vision statement if you have one, worship style, ministry programs in the areas of Christian education, social justice, and pastoral care)
3. Resources (building, annual givings, stewardship activities, etc.)
4. Ministry Personnel Position Description (full-time or part-time, focus of ministry, solo or team ministry, etc.)
5. Skills and Knowledge Required of the Ministry Personnel (skills and gifts required and valued for the position description(s); are you seeking an ordained, diaconal, or designated lay minister)
6. Terms for the Ministry Personnel Position (range for salary and benefits for ministry personnel position(s))

Recommendations

The basic recommendations available to needs assessment committees are limited to the following:

- request the presbytery to approve one or more vacancies for ministry personnel positions to be filled through call, appointment, or settlement;
- request the presbytery to appoint an interim minister;
- request the presbytery to appoint a supply minister; and
- request the presbytery to approve a change in terms of call or appointment.

Sample Motion

That the Joint Needs Assessment Committee of St. Anywhere United Church recommend the declaration of a vacancy for a full-time ministry personnel position of word, worship, and pastoral care.

Search and Selection

Living Out God’s Mission in the World

The search and selection policies and procedures aim to support local ministries that are in need of new or additional ministry personnel leadership by matching the gifts and skills of ministry leaders with the position descriptions written by the Joint Needs Assessment Committee in order to have leadership that empowers the community to live out God’s mission in the world.

Policies and Procedures

The policies about search and selection may be found under Pastoral Relations in section I.1.6 (I.1.6.1–I.1.6.5) of *The Manual*. This search and selection resource includes additional policies and procedures that must be followed. It includes policies from *The Manual*, in order to give a complete picture of the search process. Policies from *The Manual* are written in italics.

1. *A search process must be used when the pastoral charge calls a member of the order of ministry to fill a vacancy declared by the presbytery.*
2. *A search process may also be used when the presbytery appoints a ministry personnel to the pastoral charge.*

The governing body or the pastoral charge may recommend a ministry personnel for appointment without using a search process.

3. The mandate of the Joint Search Committee is determined by the joint needs assessment recommendations and report, including
 - (a) the number of positions that need to be filled;
 - (b) the position description for each position;
 - (c) the skills and knowledge needed by the ministry personnel for each position; and
 - (d) the terms of each position.

Before a search process begins, the needs assessment report and recommendations must be approved by the governing body, the pastoral charge, and the presbytery.

4. *The search is conducted by a committee called the Joint Search Committee. The Joint Search Committee consists of*
 - (a) *two representatives of the presbytery, elected by the presbytery; and*
 - (b) *representatives of the pastoral charge, elected by the pastoral charge or its governing body.*

The pastoral charge has the flexibility to elect the people it considers most suitable for its Joint Search Committee, whether full members, members, or adherents.

The ministry personnel currently settled or appointed to the pastoral charge may not serve on the Joint Search Committee.

5. The presbytery representatives are responsible for calling the first meeting of the Joint Search Committee.
6. *The Joint Search Committee is responsible for setting the process that it will follow. Its work is confidential.*

- (a) The Joint Search Committee decides on quorum for the committee. Quorum must be at least two people, including one person from the pastoral charge and one person from the presbytery.
- (b) The Joint Search Committee recommends a budget for the search and selection process that is approved by the governing body.
- (c) The Joint Search Committee decides whether it will continue with the search process or use the settlement process.
- (d) The Joint Search Committee is responsible for ensuring that human rights are observed during its process.
- (e) The Joint Search Committee is responsible for reporting regularly to the pastoral charge about its process.

Search Process or Settlement?

The **search process** is used by pastoral charges that have a vacant ministry position, and would like to search for and call their own minister.

The **settlement process** is a matching process between diaconal or ordained ministers and local ministries that is completed by the Settlement Committee.

The Settlement Committee is a Conference committee. All calls recommended by pastoral charges are subject to approval by the presbytery and the Conference Settlement Committee. Once a call is approved by the Conference, it becomes a settlement.

7. The Conference Settlement Committee is not required to settle a member of the order of ministry to a pastoral charge that
 - (a) has not enrolled in the pastoral charge payroll service;
 - (b) is enrolled in the pastoral charge payroll service but is in arrears of payment; or
 - (c) is in arrears for group insurance or pension plan contributions.

The Joint Search Committee is responsible for ensuring that the pastoral charge is a member of the pastoral charge payroll service, and is up-to-date with payroll and pension payments, before recommending a member of the order of ministry for the call to the pastoral charge.

8. The Joint Search Committee is responsible for negotiating the terms of the call or appointment with the final applicant. The terms must be negotiated within the limits of the budget that was set at the beginning of the search process. If the search committee

wants to negotiate outside the set budget limits, it must return to the governing body for a decision before coming to an agreement with the applicant.

9. If a pastoral charge owns a manse, and includes the manse as part of the terms of call, it is the responsibility of the governing body to arrange for the visitation of the manse and a report on its condition, including recommendations for any necessary repairs or maintenance. The report must be shared with the Joint Search Committee. A call must not be issued until the recommendations have been adequately addressed.
10. It is the responsibility of the Joint Search Committee to ensure that the final applicant is in good standing with The United Church of Canada.
11. It is the responsibility of the Joint Search Committee to ensure that the final applicant has a current vulnerable sector (level 2) police records check. The committee may keep a copy for its records.
12. The presbytery or the chair of the annual meeting must call a meeting of the pastoral charge or congregation to receive the recommendations of the Joint Search Committee. The convenor of the Pastoral Relations Committee or an appointee must chair this meeting.

For more information on notice of meetings for pastoral relations matters, please see *The Manual*, section B.5.4.2 a.

 - (a) *Before giving notice to the congregation or pastoral charge, the person calling the meeting must give notice to the secretary of the presbytery and to the ministry personnel settled in or appointed to the pastoral charge.*
 - (b) *Notice of the meeting must be read during public worship on two Sundays. After notice has been read on the second Sunday, the meeting may take place on the next day (Monday) or on any day after that.*
13. The Joint Search Committee is responsible for keeping the name of the final applicant confidential until the meeting of the pastoral charge or the governing body where the motion to issue the call or appointment is made.
14. The Joint Search Committee is responsible for
 - (a) recommending a member of the order of ministry for the call to the pastoral charge, or
 - (b) recommending a ministry personnel for the appointment to either the pastoral charge or its governing body.

The Joint Search Committee may recommend only one ministry personnel for each position or portion of a shared position, at any one time.

The Joint Search Committee may bring recommendations to fill multiple positions to one meeting of the pastoral charge.

15. The pastoral charge must vote on the recommendation(s) of the Joint Search Committee. The options open to the pastoral charge are
 - (a) to accept the recommendation(s); or
 - (b) to not accept the recommendation(s).
16. If the pastoral charge accepts the recommendation(s) of the Joint Search Committee, copies of the motion(s) carried by the pastoral charge and the pastoral relations forms must be sent to the presbytery.
17. The presbytery is responsible for acting on the decision of the pastoral charge: making the appointment, or approving the call and forwarding it to the Conference for settlement.
18. The Conference Settlement Committee is responsible for settling the ministry personnel in response to the call by the pastoral charge. The Conference Settlement Committee is also responsible for sending a letter or other communication acknowledging that the settlement has been made.
19. The presbytery is responsible for providing an act of covenant between the ministry personnel, the local ministry, and the presbytery.

For policies and procedures about transfer, settlement, call, and appointment, please see the next section in this resource: Transfer, Settlement, Call, and Appointment on page 25.

Best Practices for the Search Process

This section provides information and guidance to support pastoral charges and presbyteries working together to settle or appoint ministry personnel to pastoral charges. You are encouraged but not required to follow the best practices described here.

For information on eligible ministry personnel and creating pastoral relationships, see the section in this resource on Transfer, Settlement, Call, and Appointment, page 25.

Joint Search Committee Members

Your pastoral charge is free to appoint as many members to the Joint Search Committee as it deems necessary to represent the community; between four and six members makes a functional committee. The members of the Joint Search Committee should reflect the demographics of the membership of the pastoral charge. In a pastoral charge with two or more congregations, there should be representation from each congregation.

Other ministry personnel called or appointed to the pastoral charge may not be members of the Joint Search Committee. Lay employees of the pastoral charge and family members of ministry personnel should not be members of the Joint Search Committee for the same reason: conflict of interest, either real or perceived.

Joint Search Committee Process

The Joint Search Committee is responsible for setting its own process. Elements of the search process that the committee will want to consider include meeting structure, a model for decision-making, a recruitment process, a communication process, and applicant evaluation tools.

Meeting Structure

The committee may want to create structure for meetings.

Things to consider are a meeting schedule, how worship will fit into your meetings, and if it would be helpful to name members to roles such as recording secretary and chair. Alternatively, communication, correspondence, and organizational tasks may be delegated in other ways.

Remember that once the committee gets to the interview

stage, the meeting schedule will depend on the availability of the applicants. The committee may also visit applicants during Sunday morning worship.

Prayer invites the Spirit to be part of the meeting and reminds us that God is part of the journey.

A Model for Decision-Making

The committee will need to decide if it will come to decisions by consensus or voting. Some committees may decide that they will aim for consensus and only vote if consensus cannot be reached. The results of any vote are a confidential part of the process.

A Recruitment Process

There are both formal and informal ways to recruit applicants.

Formal Process

The Vacancy List is a list of all United Churches that are currently searching for ministry personnel. It is a national list, updated monthly and available through the Church Leadership Network (<http://churchleadership.united-church.ca>). To add your church to the vacancy list, fill out the Record of Pastoral Charge Vacancy form, available on the United Church website (www.united-church.ca).

Consider placing your advertisement online, through church websites: your pastoral charge's website, the presbytery website, and the Conference website. *The Observer* website is also an option, as are other job posting websites, such as Charity Village.

Placing an advertisement in the print version of *The Observer* takes at least six weeks, but can be worth the wait because of the large circulation that the magazine receives.

It is important to remember to remove information in a timely manner. Do not leave old advertisements in circulation.

Informal Process

Use as many resources as possible to compile your list of potential applicants, and then contact individuals and invite them to apply. Consider the following resources:

- The Availability List, a list of all ministry personnel currently seeking a change in pastoral relations. It is a national list of the United Church, updated monthly and available from your Conference office. (See www.united-church.ca/contact/conferences for Conference contact information.)
- Check the *Year Book*, an annually published list of all ministry personnel in the United Church.
- Invite recommendations from members of the pastoral charge and others.
- Ask your Conference personnel minister.

A closing date should be established and published on the national Vacancy List and in all other advertisements. If no suitable applicant is found, the search committee will have to decide whether to extend the deadline and solicit further applicants, or consider settlement. If a supply minister has not already been appointed to cover the worship and pastoral care needs of the pastoral charge, the search committee or governing body may consider requesting presbytery to appoint a supply minister at this time.

A Communication Process

The Joint Search Committee will need to ensure that applicants know how to access the committee. The committee may decide to identify one person to address application packages to, through a mailing address and/or an e-mail address.

The Joint Search Committee will need to ensure that it communicates in a timely and consistent manner with all applicants. Communicate with applicants at least at the following points:

- at receipt of application, with an anticipated date for when applicants will be notified if they have an interview;
- to indicate that applicants will not be considered further;
- to indicate that applicants have been selected for an interview, with the interview date;
- to indicate whether or not applicants have been short-listed for a second interview, including the interview date for those who have been short-listed;
- to indicate that an applicant is the final applicant and that the committee will proceed with reference checks, a police records check, and to confirm good standing; and
- to notify all other short-listed applicants that an applicant has been chosen.

Remember that the e-mail will need to be confidential—an e-mail address where more than one person has access, such as a main church address or a family e-mail address is not appropriate. If necessary, set up an e-mail just for the search, for example `AnywhereUnitedSearch@mail.com`.

The Joint Search Committee will need to communicate regularly with the governing body and the pastoral charge. Remember that much of the work of the committee is confidential. Personal information about applicants and decisions cannot be shared, but information about the process can be, for example:

- the names of committee members;
- the number of meetings held;
- the number of inquiries received;
- the number of interviews; and
- assurance that the same criteria will be used to evaluate all applicants.

The presbytery representative does not need to be present when updates are given to the governing body or pastoral charge. Further, updates may be written in a newsletter, given during the worship announcements, or in some other manner.

Applicant Evaluation Tools

There are two parts to the evaluation of applicants: the process and the criteria.

Evaluation Process

The evaluation process generally consists of a resumé, eligibility check, interview, visit during worship, and references.

Each member of the search committee should read every resumé and participate in the evaluation of all applicants.

The search committee should make a short-list of applicants to be interviewed, and check that each applicant being considered for an interview is in good standing with The United Church of Canada.

The Joint Search Committee is responsible for conducting interviews on behalf of the pastoral charge. Remember that an interview goes two ways: while you are interviewing the applicant, they are also interviewing the pastoral charge. Consider the following courtesies:

- Arrange for transportation and accommodation for the applicant, if necessary.
- Arrange for someone from the search committee to meet the applicant at the interview location.
- Provide a comfortable setting for the interview.
- Provide water for the applicant in the interview, and for search committee members.
- Provide nametags for the search committee members.
- Have search committee members introduce themselves.

- Arrange for a search committee member to begin the interview with prayer.
- Provide a clear description of the process, ensuring that there are no surprises for the applicant.
- Allow time in the interview for the applicant to ask questions of the search committee.
- Provide specific information on when the applicant will hear from the committee.
- Arrange for someone to accompany the applicant to their car or transportation after the interview.

It is important for the search committee to be prepared for the interview, knowing in advance what the questions are, who is going to ask which questions, and how long the interview is going to take. It is appropriate to have the presbytery representatives be involved in some way—leading the opening prayer, or asking questions about the ministry personnel’s involvement in presbytery, Conference, or General Council ministries are good examples.

It is important to ask questions that relate to the position description, since the goal is to find the best match for the ministry needs within your congregation and community. The search committee may want to ask questions about the following:

- past ministry experience;
- theology;
- call (what calls you to this position and community?);
- change of pastoral relations (why are you considering a change in pastoral relations?);
- past educational experience;
- continuing education;
- conflict management;
- change management;
- strengths in ministry;
- areas of growth in ministry;
- experiences of solo/team ministry;
- church administration;
- time management; and
- self-care.

Human rights must be honoured at all times. Occasionally in an interview, an applicant may offer information about their family, gender, or political affiliation. The search committee must not ask for further information, or use the information as evaluation criteria.

It is very important for the search committee to develop its own questions related to the position description from the joint needs assessment report, so that the applicant whose gifts and skills best match the position description—and the ministry needs of the congregation—is found.

The purpose of visits during worship is to experience the worship leadership skills of the applicant. If the search committee is not interviewing for a worship leadership position, try and figure out if there is another way to see the ministry personnel in action, such as attending a workshop or other event where the applicant is offering leadership. The committee should inform the applicant that they will be attending and their attendance needs to be inconspicuous.

If the Joint Search Committee decides to conduct second interviews with one or more short-listed applicants, this is the time to discuss the remuneration package.

References and a police records check are part of the process for the final applicant. Reference checks are used for two purposes. The first is the evaluation of reliability and qualifications. The second is the evaluation of other abilities, skills, personal suitability, or other qualifications for ministry. In order for the information obtained from references to be as useful as possible, the questions must be relevant to the qualifications and skills being assessed for the position description.

For more information on police records checks, see the Police Records Checks resource, available on The United Church of Canada website (www.united-church.ca).

Suggestions for reference checks:

- Designate two members of the Joint Search Committee to make, together, all of the calls to references. Conference calls and webinars are two easy way to link groups of people.
- Get the applicant's consent to check all references.
- Reference checks are direct queries with the people who have been named as references by the applicant.
- The name of each reference, the date, and the names of the interviewers should be recorded.
- Usually reference checks take place following the interview. Often the information that the applicant provides in the interview can lead to more specific questions for the reference check.
- It is important to confirm facts stated in resumés and to contact named references. In fact, it is the obligation of the Joint Search Committee to do so. Cross-reference the applicant's work history with resumé claims.
- If necessary, the committee can ask for additional references. Sometimes a reference may suggest another person to contact. Additional references should be checked only with the permission of the applicant. Discretion should be exercised when contacting references from the applicant's current pastoral charge.
- The Joint Search Committee may want to verify previous employment, dates of employment, and so on, by contacting previous employers.

- Eligibility may be determined by contacting the presbytery and the Conference personnel minister through the presbytery representatives.

In a reference check, screening questions, general questions, and more specific information-based questions are all helpful, for example:

- Screening question: Are you aware of any characteristics of this applicant that would raise questions about their ability to work well in this ministry?
- General question: What are the applicant's strong points?
- Information-based question: Was there ever a time the applicant had to initiate a project, gain the support of others, and see it through to its conclusion? If so, how did the applicant do it?

Evaluation Criteria

The evaluation criteria are measures set by the Joint Search Committee against which all applications are compared. The joint needs assessment report and position description are very important when setting the evaluation criteria. It is helpful to determine both “must have” and “want to have” knowledge, skills, and experience with which to evaluate all applications received.

Process of Negotiation of Terms

The Joint Search Committee is responsible for negotiating the terms of the call or appointment with the final applicant. The whole Joint Search Committee does not need to be present for this meeting. It is appropriate for the committee to give one person, or a small group of people, the authority to negotiate the terms in a meeting with the final applicant.

Remember that the terms must be negotiated within the budget that was set at the beginning of the search process. If the Joint Search Committee and the final applicant wish to negotiate outside of the set budget, the Joint Search Committee must first take a recommendation back to the governing body to approve an increase to the budget.

Pastoral relations forms are available on the United Church website (www.united-church.ca).

Once the final applicant has accepted the position, and the terms have been negotiated, the appropriate pastoral relations forms need to be filled out. The presbytery representatives will be able to direct the search committee to the necessary forms.

Joint Search Committee Disbands

When the ministry personnel receives the confirmation of settlement from the Conference, or the approval of appointment from the presbytery, the work of the Joint Search Committee is done.

The process and the files of the search process remain confidential, and the committee must maintain confidentiality and not discuss who the other applicants were and why they were not selected.

The resumé, position description, call or appointment form, police records check, and application package of the successful applicant must be given to the chair of the Ministry and Personnel Committee. This information will be included in the minister's confidential personnel file.

All other resumé, application packages, notes from interviews, and so on, from the search and selection process must be destroyed.

Confidentiality and Conflict of Interest

As a participant in the Joint Search Committee, it is important to be mindful of the issues of confidentiality and conflict of interest.

Confidentiality in the search process means that no individual should be recognizable in a comment or in summaries of information prior to the presentation of the name to the pastoral charge.

A conflict of interest may be monetary or non-monetary.

- A monetary conflict arises where the committee is considering a decision that may have a monetary effect, either positive or negative, on a member of the committee or a person close to the member (relative or friend).
- A non-monetary conflict arises in any circumstance where a member of the committee is constrained in any way from acting in the best interests of the United Church. That could occur when a member of the committee or person close to the member stands to gain a benefit in some non-monetary way from a decision that the committee is considering.

Human Rights

The United Church of Canada supports the protection of human rights, abolition of discrimination in all its forms, and adherence to legislated provincial/territorial human rights codes.

Human rights law is based on the principle that employment decisions should be based on the applicant's ability to do the job rather than on factors that are unrelated to job requirements, qualifications, or performance. Prohibited grounds of discrimination in various Canadian jurisdictions include race, colour, disability, political affiliation, ancestry, family status, age, record of offences, place of origin, gender, marital status, receipt of public assistance, citizenship, and sexual orientation.

Advertising, application forms, and interviews must not include any questions that relate directly or indirectly to prohibited grounds of discrimination. Asking questions to solicit information in any of these areas is inappropriate and could be challenged as a violation of human rights.

Transfer, Settlement, Call, and Appointment

Living Out God’s Mission in the World

The policies and procedures about transfer, settlement, call, and appointment aim to support local ministries and ministry personnel in covenanting fair and legal pastoral relationships that empower the community to live out God’s mission in the world.

Policies and Procedures

The policies and procedures about the Transfer Committee, Settlement Committee, call, and appointment may be found in section I. Pastoral Relations of *The Manual*. References to specific sections are listed below. This resource includes additional pastoral relations policies and procedures that must be followed. Also included are the Guidelines for Presbytery-Recognized Ministries, offering the opportunity for ordered ministers to be settled to a wide variety of ministry contexts, while maintaining an active covenantal relationship with the United Church.

- Transfer – I.1.1
- Settlement and Call – I.1.2
 - Call – I.1.2.2
 - Settlement – I.1.2.3
- Appointment – I.1.3
- Options for Candidates – H.5.3
- Transfer and Settlement or Other Approved Options [for Commissioning or Ordination] – H.6.4
- Presbytery-Recognized Ministry – B.2.4; I.1.2.3; I.1.2.4

Introduction

Pastoral relationships can begin in one of three ways:

- (1) settlement;
- (2) call and settlement; or
- (3) appointment.

Settlements may be made as part of the transfer and settlement process, co-operatively by the Transfer Committee of the General Council and the Conference Settlement Committees, in response to applications from members of the order of ministry, candidates for ministry, and pastoral charges or other presbytery-recognized ministries.

Settlements may be made by Conference Settlement Committees in response to calls that have been issued by pastoral charges and approved by presbyteries.

Appointments may be issued by presbyteries to fill a vacancy, for short-term supply, or for intentional interim ministry.

Different ministry personnel are eligible for different types of pastoral relationships. Below is a list of the different types of ministry personnel in The United Church of Canada, and what types of pastoral relationships they are eligible for.

Eligible Ministry Personnel

“Ministry personnel’ is a general term that refers to members of the order of ministry, designated lay ministers, candidates serving under appointment, diaconal supply, and ordained supply. Ministry personnel serve in paid accountable ministry positions in the United Church and in other ministries.” (*The Manual*, 2013, I.1)

Members of the Order of Ministry: Diaconal and Ordained Ministers

Diaconal ministers are eligible for settlement, call, or appointment.

Diaconal ministers are commissioned to the ministry of education, service, and pastoral care, and as members the order of ministry of The United Church of Canada they are eligible for settlement, call, or appointment. Diaconal ministers serve in various capacities, such as in congregational ministry, in community development, as chaplains, in inner-city ministry, as overseas personnel, at lay education centres and theological schools, or in staff positions at presbytery, Conference, or General Council. Sometimes these ministries include worship and the sacraments. One significant aspect of this ministry is the co-operative team relationship that is central to the diaconal minister’s style and identity.

Ordained ministers are eligible for settlement, call, or appointment.

Ordained ministers are members of the order of ministry of The United Church of Canada, and as such are eligible for settlement, call, or appointment. “Ordained ministers serve in all aspects of ministry and are formally called to word, sacrament, and pastoral care. This involves presiding in worship and sacrament, nurturing and strengthening the beloved community of God, making the wisdom of the ages relevant for today, and being representatives of Christ in the world in seeking justice and wholeness for all of creation.” (The United Church of Canada, “Statement on Ministry,” 2013)

Candidates

Candidates are eligible for appointment.

Candidates are lay members of The United Church of Canada who are in the formal process—called the candidacy process—for preparation for diaconal or ordained ministry. Candidates are eligible for supply appointments.

Candidates must also complete a supervised ministry education appointment as part of their education program. Candidates who are enrolled in a ministry-based ordination program must have a half-time appointment while studying.

For more information about supervised ministry education, please see the Supervised Ministry Education resource, available on the United Church website (www.united-church.ca).

Education-based appointments require the pastoral charge to be designated as a learning site. A pastoral charge supervisor and an educational supervisor must be assigned.

A candidate whose candidacy process is terminated is no longer eligible for appointment. If a candidate is appointed at the time that their candidacy process is terminated, the appointment must be ended with 90 days' notice.

Designated Lay Ministers

Designated lay ministers are eligible for appointments.

Designated lay ministers are lay members of The United Church of Canada who are recognized by the presbytery to serve in paid accountable ministry, and as such are eligible for appointments in solo or team ministry contexts. It is possible to appoint a designated lay minister to a pastoral charge for more than one year; multi-year appointments must be pre-approved by the Conference Settlement Committee or equivalent. Designated lay ministers are not eligible for call.

Designated lay ministry students are called designated lay minister applicants and must have a half-time appointment while studying. The pastoral charge must be designated as a learning site, and a pastoral charge supervisor and an educational supervisor must be assigned.

A designated lay ministry applicant whose application for ministry is terminated is no longer eligible for appointment. If the application for ministry of a designated lay minister is terminated, the designated lay minister's appointment must also be ended with 90 days' notice.

Retired Ministry Personnel

All retired diaconal and retired ordained ministers are eligible for supply appointments in pastoral charges. Retired designated lay ministers who have retained their presbytery membership are eligible for supply appointments in pastoral charges. No retired ministry personnel are eligible for call.

Interim Ministers

Interim ministers are eligible for intentional interim appointments.

Interim ministers are designated lay ministers, diaconal ministers, and ordained ministers who have been designated by the Conference to serve in interim ministry

For more information on interim ministry, please see the Interim Ministry resource, available on the United Church website (www.united-church.ca).

appointments. “An ‘interim ministry’ is a time-limited ministry in a pastoral charge. The purpose of the interim ministry is to work toward specific goals decided on by the presbytery and the pastoral charge” (*The Manual, 2013, I.1.7.1*). These goals can be mission-based, pastoral, or organizational.

Admission Applicants

Admission applicants are eligible for appointment.

Admission applicants are diaconal or ordained ministers from other denominations who are applying to be admitted into the order of ministry of The United Church of Canada. Admission applicants must have their credentials (ordination, education, good standing, police records check, references) cleared by the General Council Office before they are eligible for an appointment. An admission applicant serving in an appointment is termed either an ordained supply, or a diaconal supply.

Appointment

1. *This section applies if*
 - (a) *the presbytery has not declared a vacancy; or*
 - (b) *the presbytery has declared a vacancy and the pastoral charge needs a supply ministry until the vacancy can be filled.*

The presbytery may appoint one of the following to the pastoral charge: a designated lay minister, a diaconal supply, an ordained supply, a candidate, or a member of the order of ministry.
2. *The presbytery may appoint a designated lay minister to fill a vacancy.*
3. *The presbytery may appoint a member of the order of ministry or a designated lay minister to a presbytery-accountable ministry.*
4. *For appointments of ministry personnel to pastoral charges and other presbytery-accountable ministries,*
 - (a) *the presbytery must specify the term of the appointment;*
 - (b) *it may also renew any appointment; and*
 - (c) *the term of an appointment or renewal may not extend beyond June 30 of any year without approval in advance from the Conference Settlement Committee.*
5. *The presbytery appointment may be renewed based on a positive annual performance review, completed by the local ministry and received by the presbytery.*
6. *The presbytery must receive a vulnerable sector (level 2) police records check from the ministry personnel, at the expense of the ministry personnel, before making the appointment.*

- (a) The presbytery may appoint a retired ministry personnel to a supply appointment within the presbytery of which they are a member, based on a vulnerable section level two check that has been issued within the last two years.

Legal requirements for police records checks change often. For the most up-to-date information and requirements about police records checks, please see the Police Records Checks resource, available on the United Church website (www.united-church.ca).

7. The presbytery must send a copy of the appointment form to the Conference Settlement Committee and the General Council Office.
8. The presbytery must request a transfer of membership when the ministry personnel being appointed is a member of another presbytery.

Call

1. *When a call is issued by a pastoral charge, the presbytery is responsible for*
 - (a) *deciding whether to approve the call; and*
 - (b) *if the call is approved, making a recommendation to the Conference Settlement Committee that the member of the order of ministry be settled in the pastoral charge.*
2. When a call is issued by a pastoral charge, and the member of the order of ministry is a member of another presbytery, the presbytery approving the call is responsible for initiating a transfer of membership and forwarding a copy of the call form to the other presbytery.
3. The presbytery is responsible for ensuring that the terms of call meet the minimum requirements for ministry personnel remuneration.
4. The presbytery is responsible for sending a copy of the call form to the Conference Settlement Committee.
 - (a) If the call has required a transfer of membership, the presbytery is responsible for including a copy of the transfer form with the call form.
 - (b) If the terms of call include a manse, the presbytery is responsible for including a copy of the manse form with the call form.

Conference Settlement Committee

1. *Settlement refers to the action by the Conference Settlement Committee to place a member of the order of ministry in a pastoral charge or other presbytery-recognized ministry. A settlement may be in response to*
 - (a) *a call that has been issued to and accepted by a member of the order of ministry, and approved by the presbytery; or*

- (b) *a request for settlement, as part of the transfer and settlement process. Any member of the order of ministry who has not retired, or any pastoral charge or presbytery-recognized ministry, may apply for settlement.*
2. The Settlement Committee is responsible for initiating communications with members of the order of ministry and pastoral charges, or other presbytery-recognized ministries, in order to effect settlements.
 3. Recognizing that settlements are ordinarily made at the Conference annual meeting, the Settlement Committee may, through its executive, make settlements during the pastoral year.
 4. The Conference Settlement Committee is responsible for reporting the following to the Conference annually:
 - (a) a complete list of settlement decisions;
 - (b) the names of all members of the order of ministry who have been transferred in and out of the Conference;
 - (c) the name of each person who has been placed on the Discontinued Service List (Disciplinary) or the Discontinued Service List (Voluntary) by decision of the Conference. The executive secretary or speaker is responsible for reporting the name(s) placed on the Discontinued Service List to the General Council Office; and
 - (d) the names of members of the order of ministry who are left without call or appointments, with recommendations as to which Conference their membership should be placed.
 5. The Settlement Committee is responsible for receiving information about vacant pastoral charges from presbyteries, and forwarding the information to the Transfer Committee.
 6. A member of the order of ministry who is called to a pastoral charge in another Conference must be transferred to that Conference before the call can be settled and the assurance of covenant sent from the Settlement Committee.
 7. The Conference Settlement Committee is not responsible for settling a member of the order of ministry to a pastoral charge that
 - (a) has not enrolled in the pastoral charge payroll service;
 - (b) is enrolled in the pastoral charge payroll service but is in arrears of payment; or
 - (c) is in arrears in group insurance or pension plan contributions.
 8. The Conference Settlement Committee is responsible for sending an assurance of covenant—a letter, a copy of the minutes of the Settlement Committee, or other communication—to the presbytery.

Transfer Committee

1. *The Transfer Committee of the General Council is responsible for transferring members of the order of ministry from one Conference to another.*

The Transfer Committee holds an annual meeting to consider all applications for transfer and settlement from

- (a) members of the order of ministry;
- (b) candidates for ordered ministry; and
- (c) pastoral charges and presbytery-recognized ministries.

Applications from members of the order of ministry and candidates for ordered ministry will be considered on an equal basis.

3. *A pastoral charge or other presbytery-recognized ministry may request settlement for a ministry position of a minimum of eight hours per week. The pastoral charge must have a vacancy declared by presbytery, and a ministry personnel position description approved by presbytery before applying for settlement.*
4. Only in exceptional circumstances are there services of commissioning or ordination between annual celebrations of ministries of Conferences.

Transferring Presbytery Membership

The term “transfer” is also used to describe the action of moving the membership of members of the order of ministry from one presbytery to another. The transfer of presbytery membership is the responsibility of the Conference Settlement Committee. For more information about transfer of presbytery membership, please see the Appointment and Call sections in this resource, pages 28 and 29.

Options for Candidates

1. *A candidate who is recommended for commissioning or ordination is responsible for choosing one of the following options for work in paid accountable ministry following commissioning or ordination:*
 - (a) *to be transferred and settled into a position by action of the Transfer Committee and Settlement Committee; or*
 - (b) *to seek a call or appointment.*

The candidate must make the choice within the time limit set by the appropriate General Council working unit. A candidate who does not meet the time limit is no longer eligible for transfer and settlement in that year, but may seek a call or appointment.

2. The presbytery is responsible for recommending to the Conference those candidates who are ready for commissioning or ordination.
3. The Conference Education and Students Committee is responsible for recommending to the Conference those candidates who are to be commissioned or ordained.

4. The Transfer Committee is responsible for sending information to all candidates, including a form to indicate the candidate's choice between

(a) Transfer and Settlement; or

(b) Seek Call/Appointment.

The candidate reports their decision to the Transfer Committee and their home Conference Settlement Committee by February 1 in the year they are to be commissioned or ordained. The choice is effective for one full year—that is, until February 1 of the following calendar year.

5. Should a candidate not be transferred and settled or be successful in obtaining a call or appointment prior to the annual meeting of Conference, they will not be ordered and will be deemed to have deferred. Candidates will make another decision regarding transfer and settlement, or seeking a call or appointment, in the following year.
6. The Transfer Committee is responsible for matching and transferring all candidates who requested transfer and settlement to a Conference with suitable placement sites, and reporting to the Conference Settlement Committee and Conference Education and Students Committee.
7. The Conference Settlement Committees are responsible for meeting and matching candidates with settlement sites in the Conference.
8. Candidates who choose to seek call or appointment must provide an assurance of call or appointment to the Conference by sending a copy of the provisional call form or presbytery-approved appointment form prior to the annual meeting of Conference. The effective date of the provisional call or appointment must be within the Conference year.
9. Following the Conference annual meeting, copies of call forms, or appointment forms, accompanied by transfer forms, for all candidates who were ordained or commissioned but not transferred at the annual Transfer Committee Meeting are to be sent by the Conference to the Transfer Committee. These transfers will be acted on and reported at the Transfer Committee meeting the next year.

A provisional call may only be signed by a candidate after they have been recommended to Conference for ordering, i.e., after the Conference final interviews.

Financial and Other Incentives for Candidates

In recognition of the willingness of a candidate for ordination or commissioning to serve the church anywhere the Transfer and Settlement Committee places them, candidates are given the opportunity to choose one of the following four incentive options, no later than June 15 of the year of settlement.

Option 1: That two extra weeks of vacation each of three years while on the settlement charge be provided to individuals choosing transfer and settlement and that the General Council provide the pastoral charge with \$1,500 per year to assist with pulpit supply and salary costs.

If the presbytery ends the pastoral relationship, at the request of the settlement charge or local ministry, before the completion of the initial three years, the General Council will pay \$1,500 to the ministry personnel for each year not served and the General Council will not provide any further funds to the pastoral charge or local ministry. If the presbytery ends the pastoral relationship, at the initiation of the ministry personnel or the presbytery, before the completion of the initial three years, no further benefits are provided under this option.

Option 2: That the General Council provide a cash bonus of \$1,500 (taxable) each of three years while on the settlement charge to individuals choosing transfer and settlement.

If the presbytery ends the pastoral relationship, at the request of the settlement charge or local ministry, before the completion of the initial three years, the General Council will pay a cash bonus of \$1,500 to the ministry personnel for each year not served. If the presbytery ends the pastoral relationship, at the initiation of the ministry personnel or the presbytery, before the completion of the initial three years, no further benefits are provided under this option.

Option 3: That individuals choosing transfer and settlement be allowed to accrue a credit of \$1,500 each of three years while on the settlement charge to be applied toward a subsequent move.

If the presbytery ends the pastoral relationship, at the request of the settlement charge or local ministry, before the completion of the initial three years, the General Council will credit the ministry personnel with a total of \$4,500 to be applied to a subsequent move. If the presbytery ends the pastoral relationship, at the initiation of the ministry personnel or the presbytery, before the completion of the initial three years, no further credit is accrued under this option beyond a prorated credit based on \$1,500 per year served, rounded to the nearest month served.

Option 4: That individuals choosing transfer and settlement be offered a premium relocation package worth up to \$4,500 (over and above the physical move of household goods) which would provide a menu of choices to ease the burden of relocation to the settlement charge. This program includes a client agent to support the entire relocation experience, with options that would include a pre-move trip for house/apartment hunting; return trips “home”; real estate costs; partner assistance (job finding, etc.); premium household goods move (full pack); and many other service options.

Staff from the Ministry and Employment Unit of the General Council Office will communicate with candidates who are eligible for the above incentives.

Covenanting

1. *The presbytery is responsible for providing an act of covenant for each new pastoral relationship between a member of the order of ministry, the presbytery, and a pastoral charge or other presbytery-recognized ministry.*
2. *The act of covenant must include any other ministry personnel and staff in the pastoral charge.*
3. *The presbytery must ensure that the member of the order of ministry has been settled in the pastoral charge or presbytery-recognized ministry before providing the act of covenant.*

4. The presbytery must provide an act of covenant where a new pastoral relationship is established by an appointment of six months or longer.
5. When a settlement is made to a presbytery-recognized ministry, the presbytery is responsible to hold a service of covenanting with the ordered minister, the presbytery, and the recognized ministry. The covenanting service will express the commitments and agreements between the presbytery, the ministry, and the ordered minister.
6. The General Council Executive must provide an act of covenant for any ministry personnel or lay member who is appointed by the General Council Executive as a General Council officer, executive minister or officer, or Conference executive secretary or Speaker.

Settlement to Presbytery-Recognized Ministries

Policies and Procedures

The policy about presbytery-recognized ministry may be found under Local Ministry Unit in section B.2.4 of *The Manual*. This presbytery-recognized ministries resource includes additional policies and procedures that must be followed.

Presbytery-recognized ministries must fulfill three criteria:

1. the willingness of the institution of be part of a covenant with the United Church;
2. the willingness of the individual to enter into a covenant relationship and be accountable to the presbytery; and
3. the agreement that the individual will be involved in the life of the presbytery and Conference.

Presbytery-recognized ministries take many forms. Some will be expressed in directly related church institutions, such as educational centres, theological schools, chaplaincies, campus ministries, or community ministries. Other presbytery-recognized ministries may be non-church related institutions such as a corporate chaplaincy, a business with an ethical mission objective, an academic or teaching position, or a community-based movement. The positions engaged by the ordered ministers within these institutions may be paid or unpaid (volunteer).

The covenant relationship for a presbytery-recognized ministry involves four parties:

- God;
- the presbytery;
- the institution; and
- the ordered ministry.

The relationship will not involve the presbytery in oversight of the institution itself. The presbytery provides support and holds the ordered minister accountable for the faithful exercise

of their ordination or diaconal vows, and the Ethical Standards and Standards of Practice of The United Church of Canada, within the presbytery-recognized ministry so that the mission and ministry of the whole church might be strengthened. The presbytery is responsible to make sure that a regular review of the covenant agreement is undertaken.

How Oversight Works

- In a situation where the presbytery-recognized ministry is a directly related church organization, the presbytery will exercise oversight and accountability of the ordered minister in a manner similar to that of oversight of a congregationally based ministry.
- In a situation where the institution is not church-related, the presbytery will establish a means of support and accountability for the ordered ministry. For example, this might include an opportunity to meet periodically with an appropriate committee of the presbytery or to assist the presbytery in exploring options of new expressions of ministry within the service area.
- In all situations, ordered ministers who are settled in presbytery-recognized ministries covenant to participate in the life of the presbytery.
- The presbytery will seek to determine that the ministry setting is and remains a location in which a valid exercise of Christian ministry can be exercised. It will take into consideration the following questions:
 - Does the vision and activity of the organization correspond with God’s mission and Jesus’ ministry in the world?
 - Does the position afford opportunities for the practice of theological reflection and spiritual nurture?
 - Are there opportunities for the ordered minister to continue to learn and grow in their practice of ministry and in their spiritual and worship life?
 - Are the employment policies and practices of the organization fair and just?

How Settlement Works

- It is the responsibility of a candidate or member of the order of ministry to propose the approval of a presbytery-recognized ministry. Approved presbytery-recognized ministries are eligible for the settlement of ordered ministers.
- The Conference Settlement Committee initiates settlements, but the presbytery must be consulted before settlements are made.
- When a settlement is made to a presbytery-recognized ministry, the presbytery is responsible to hold a service of covenanting with the ordered minister, the presbytery, and the recognized ministry.
- The covenanting service will express the commitments and agreements between the presbytery, the ministry, and the ordered minister.

SUPPORTING POLICIES

Remuneration of Ministry Personnel

Policies and Procedures

The policies and procedures about the remuneration for ministry personnel may be found under Pastoral Relations in section I.2.1.10 of *The Manual*. This resource includes additional pastoral relations policies and procedures about moving expenses and manses that must be followed.

For more information on remuneration for ministry personnel, please see the following resources:

- The Financial Handbook for Congregations
- The Minimum Salary and Allowances Schedule for Ministry Personnel (revised annually)

Moving Expenses

The moving expenses of candidates and members of the order of ministry who are transferred as part of the transfer and settlement process are the shared responsibility of the General Council Office and the local ministry unit. This includes travelling expenses and expenses connected with moving the ministry personnel's possessions. It also includes moving the ministry personnel's family within a year of settlement.

The presbytery is responsible for deciding what responsibility an appointed ministry personnel has to reimburse moving expenses when the ministry personnel requests a change in pastoral relations before the end of their appointment.

Candidates and members of the order of ministry who are moving as part of the transfer and settlement process will be contacted by the moving company that is the contractor of the General Council Office to arrange their move.

Ministry personnel who are moving in response to a call or appointment must negotiate the arrangements for their move with the Joint Search Committee of the local ministry unit.

Manse

1. The manse must include basic appliances, fire extinguishers, smoke detectors, drapes, and rugs.
2. The manse must be unfurnished, unless exceptional circumstances require a furnished house. The presbytery is responsible for recommending the need for a furnished manse to the Conference. The Conference is responsible for designating the manse as furnished.
3. A furnished manse may become unfurnished at the convenience of the ministry personnel and pastoral charge. The presbytery must be notified.
4. The ministry personnel must take reasonable care of the manse.

Leaves

Ministry personnel are to arrange all leaves with the Ministry and Personnel Committee of the pastoral charge and the presbytery. For bereavement leave, compassionate leave, study leave, and other leaves of absence, there are no additional policies or procedures beyond those in *The Manual* at section I.2.3.

Maternity Leave

Purpose

Maternity leave benefits are available to ministry personnel in local ministry units operated by the United Church. The United Church of Canada is committed to supporting its ministry personnel in their work and family life. The church recognizes the unique circumstances related to pregnancy and provides leave for expectant mothers.

Policy

1. A ministry personnel must inform in writing the local ministry unit they are serving of their request for maternity leave at least four weeks in advance of the date of their leave, unless there is a valid reason why such notice cannot be given. Upon receipt of a written request, maternity leave without pay commencing before, on, or after the birth of their child will be granted. The period of the maternity leave will be subject to the maximums set out by the applicable government insurance plans (i.e., Canadian Employment Insurance Plan, Quebec Parental Insurance Plan).
2. The local ministry unit may require the ministry personnel to provide a medical certificate certifying the ministry personnel's pregnancy.
3. If the ministry personnel has not yet begun maternity leave and their newborn child is hospitalized, or if the ministry personnel has begun maternity leave and then returns to work while their newborn child is hospitalized, then the maternity leave can be extended, at the request of the ministry personnel, for every week the child is in the hospital, for up to 52 weeks following the week of the child's birth.
4. Maternity leave granted under this policy shall be counted as "service" for purposes of salary and benefits calculations.
5. The ministry personnel may elect to continue pension contributions and group insurance plans during the period of the maternity leave. If they elect to continue, the local ministry unit will pay its share of the benefits contributions during the period of the maternity leave. If the ministry personnel chooses to suspend making these contributions, coverage will be suspended until the ministry personnel returns to work and contributions recommence.

6. For ministry personnel whose appointment has a fixed end date, the maternity leave will end on the date the ministry personnel's appointment is completed, if the end date is prior to the conclusion of the period set out by the applicable government insurance plan.
7. Expectant mothers are entitled to time off with pay to attend prenatal checkups.
8. The ministry personnel shall provide a minimum of four weeks' notice in writing to the local ministry unit before their return to work.

Maternity Top-Up Payments

Ministry personnel on maternity leave will receive top-up payments, payable by the local ministry unit on a monthly basis while the ministry personnel is on maternity leave, provided that the local ministry unit is presented with proof that the ministry personnel is in receipt of maternity benefits under a government insurance plan.

The top-up payment will consist of the following:

- (a) income continuation of 95 percent of their weekly rate of pay, including housing allowance if applicable, if they are subject to a qualifying period of two weeks before receiving government insurance plan benefits;
- (b) a payment equal to the difference between government insurance plan benefits and their weekly salary, and housing allowance if applicable, for a total of 95 percent of the weekly rate for a period of 15 weeks; and
- (c) an income supplement in the form of an automobile allowance, calculated at 40 percent of the monthly average of the last six months of travel reimbursement paid to the ministry personnel immediately preceding the commencement of the maternity leave. This allowance is paid monthly to the ministry personnel on maternity leave.

The pastoral charge will continue to provide the ministry personnel with basic telephone service during the period of maternity leave.

Partner's Leave

Any ministry personnel who is the spouse or common-law partner of a person who has given birth to a child is entitled to five days of special leave with pay and benefits for needs directly related to the birth of the child. This leave is normally taken within the first week of the child's birth. This provision does not apply to blended families where the child is the natural offspring of one of the partners to the new union.

Parental Leave

Purpose

Parental leave benefits are available to ministry personnel in a local ministry unit operated by the United Church. The United Church of Canada is committed to supporting its ministry personnel in their work and family life. The church recognizes the unique circumstances related to new parenthood and provides leave for new parents.

For the purposes of this policy, the definition of “child” is a person who has not yet reached the age of majority in the province/territory in which the employee resides.

Policy

1. Parental leave benefits are available to biological and adoptive parents while they are caring for a newborn or newly adopted child. Parental leave benefits for biological parents are payable from the date of the newborn child’s birth and for adoptive parents from the date of the child’s placement in the home.
2. The ministry personnel shall inform the local ministry unit in writing of their request for parental leave at least four weeks in advance of the date of the commencement of the leave, unless there is a valid reason why such notice cannot be given.
3. The ministry personnel will be granted parental leave without pay for a single period according to the applicable government insurance plan limits. The period of parental leave is to be taken within the 52-week period beginning on the date the child is born or on the date on which the child comes into the care of the ministry personnel.
4. At the request of the ministry personnel, parental leave can be taken in two periods of consecutive weeks. Also, at the request of the ministry personnel, the commencement of parental leave may be deferred from the originally scheduled commencement date.
5. The ministry personnel may be required to submit to the local ministry unit a certificate of the birth of the newborn child or proof of receiving custody of the adoptive child prior to the commencement of parental leave.
6. If the child of the ministry personnel is hospitalized within the period of parental leave defined above and the ministry personnel has either not yet proceeded on parental leave or has begun parental leave and then has returned to work, the period of parental leave specified in the original leave request may be extended. This extension will be equal to that portion of the period of the child’s hospitalization during which the ministry personnel was not on parental leave and will end not later than 104 weeks after the day on which the infant child is born or on which the child comes into the ministry personnel’s care.
7. Parental leave granted under this policy is counted as “service” for purposes of salary and benefits calculations.

8. The ministry personnel may elect to continue pension contributions and group insurance plans during the period of the parental leave. If the ministry personnel elects to continue, the ministry personnel and the local ministry unit will each pay their shares of the benefits contributions during the period of the parental leave. If the ministry personnel chooses to suspend making these contributions, coverage will be suspended until the ministry personnel returns to work.
9. For ministry personnel whose appointment has a fixed end date, the parental leave will end on the date the ministry personnel's appointment is completed, if the end date is prior to the conclusion of the period set out by the applicable government insurance plan.
10. If both parents are ministry personnel within The United Church of Canada, both parents may take a period of parental leave provided that the total period of the leave taken by both parents does not exceed the maximum leave period provided under the applicable government insurance plan.
11. The ministry personnel shall provide a minimum of four weeks' notice in writing to the local ministry unit before their return to work.

Parental Top-Up Payments

Ministry personnel on parental leave will receive top-up payments, payable by the local ministry unit on a monthly basis, for a portion of the leave period while the ministry personnel is on parental leave, provided that the local ministry unit is presented with proof that the ministry personnel is in receipt of parental benefits under a government insurance plan.

The top-up payment will consist of the following:

- (a) income continuation of 95 percent of the ministry personnel's weekly rate of pay, including housing allowance if applicable, if the ministry personnel is subject to a qualifying period of two weeks before receiving government insurance plan benefits;
- (b) a payment equal to the difference between government insurance plan benefits and the ministry personnel's weekly salary, and housing allowance if applicable, for a total of 95 percent of the weekly rate for a period of 8 weeks (10 weeks, if no qualifying period is required) from the commencement of the parental leave; and
- (c) an income supplement in the form of an automobile allowance, calculated at 40 percent of the monthly average of the last six months of travel reimbursement paid to the ministry personnel immediately preceding the commencement of the parental leave or, where applicable, the ministry personnel's immediately preceding maternity leave. This allowance is paid monthly to the ministry personnel on parental leave while the ministry personnel is receiving payments under paragraphs a) or b) above.

The pastoral charge will continue to provide the ministry personnel with basic telephone service during the period of parental leave.

This policy does not apply to newly blended families where the child is the biological or adoptive child of one of the partners to the new union.

Partner's Leave

Any ministry personnel who is the spouse or common-law partner of a person on parental leave is entitled to five days of special leave with full pay and benefits for needs directly related to the adoption of a child. This leave is normally taken within the first week of the child's placement in the home. This provision does not apply to blended families where the child is the biological or adoptive child of one of the partners to the new union.

Government Links

Service Canada website—Employment Insurance (EI) and maternity, parental, and sickness benefits: www.servicecanada.gc.ca/eng/ei

Quebec Parental Insurance Plan (QPIP): www.rqap.gouv.qc.ca/index_en.asp

Sabbatical Leave

Purpose

The essence of sabbatical is rooted in the biblical practice of the Sabbath day described in the creation story. Jesus kept this practice when he took time in his ministry for renewal. He often went away to pray and reflect in silence and meditation “on mountain tops and by lakesides.” The daily practice of ministry may involve the pressure of many tasks compressed into too few hours, leaving little opportunity for reflective, prayerful time. In the context of ministry, sabbatical time is for learning through reflection, revitalization, and recreation. It is, therefore, personal and individual in nature. It may include study, spiritual retreat, and rest and will probably be a blend of all of these.

When ministry personnel take a sabbatical, congregations benefit from the opportunity to reflect on their mission and ministry and experience different gifts of lay leadership. The sabbatical offers the congregation a minister who returns with new energy and clarity about the tasks at hand.

Policy and Procedures

1. It is the policy of The United Church of Canada that every pastoral charge provides a paid sabbatical of at least three consecutive months to those in paid accountable ministry who have completed at least five years of service in one call or appointment.
2. Ministry personnel who are employed by the presbytery in paid accountable ministry positions are entitled to sabbatical leave at the cost of the presbytery.
3. Provision for a sabbatical is to be included in the terms of the call or appointment.
4. The sabbatical is in addition to the minister's vacation time and regular study leave for the year in which the sabbatical is taken.
5. Sabbatical leave may be taken in conjunction with the vacation time, continuing education, and additional unpaid leave of absence.
6. Ministry personnel must submit notice of their intent to take a sabbatical to the Ministry and Personnel Committee of the pastoral charge at least 12 months before the projected start of the sabbatical.
7. The timing of the sabbatical must be developed in consultation with the Ministry and Personnel Committee and approved by the governing body of the pastoral charge.
8. The presbytery must be notified by the pastoral charge of the ministry personnel's intent to take sabbatical time no later than six months before the start of the sabbatical.
9. The presbytery will determine whether a pastoral charge supervisor should be appointed during the period of the sabbatical leave.
10. Ministry personnel must submit a detailed proposal to the Ministry and Personnel Committee at least three months before the start of the sabbatical. This proposal should outline the ministry personnel's plans during the period of renewal, including the nature of the study or experience being proposed and the goals of the sabbatical, which must be related to the practice of ministry. While a plan is essential, the sabbatical should not be so tightly structured that the Spirit has no freedom to lead and reveal. This plan must be approved by the Ministry and Personnel Committee and reported to the governing body for information.
11. After the sabbatical, the ministry personnel must provide brief written and/or oral reports to the Ministry and Personnel Committee and to the governing body.
12. Ministry personnel taking a sabbatical and the pastoral charge are expected to continue their pastoral relationship for at least one year following the conclusion of the sabbatical.
13. During the sabbatical time, the pastoral charge pays the ministry personnel's regular salary and housing allowance (or provides the use of a manse), and makes the regular payments to The United Church of Canada for health and pension plans, the Employee Assistance Program, and Canada Pension Plan and Employment Insurance, as of the day before the start of the sabbatical.

14. Ministry personnel working less than 40 hours per week are entitled to all of the terms of the three-month sabbatical policy. During the sabbatical time, the pastoral charge pays the ministry personnel, who is working less than 40 hours, their salary and housing allowance and makes the regular payments to The United Church of Canada for health and pension plans, the Employee Assistance Program, and Canada Pension Plan and Employment Insurance, as of the day before the start of the sabbatical.
15. In those cases where the ministry personnel normally receives travel expense reimbursement for the use of a vehicle on church business, the ministry personnel while on sabbatical receives an income supplement of 40 percent of the average monthly travel claim based on the six months before the sabbatical. It is to be paid monthly and declared by the pastoral charge as taxable income.

Presbytery-recognized ministries are encouraged to make a sabbatical program similar to that offered by the United Church at the pastoral charge level.

Sabbatical Policy for Interim Ministers

1. Active interim ministers are entitled to sabbatical with the following terms:
 - (a) 60 months of service must be acquired over a period of eight years or less;
 - (b) the sabbatical is a maximum of three months in duration;
 - (c) the focus of the study is to be approved by the Conference Interim Ministry Committee (or equivalent) of the Conference in which the interim minister has most recently served before submission to the General Council Office;
 - (d) the leave is taken at a time when the interim ministry is not appointed to an interim ministry position, so that an interim appointment is not interrupted; and
 - (e) recipients of sabbatical leave agree to remain available for active ministry for a period of one year.
2. The national Interim Ministry Sabbatical Fund covers salaries and benefits for interim ministers taking sabbaticals, with the following terms:
 - (a) all pastoral charges who received the services of an interim minister are required, as a condition of appointment, to provide a payment of the equivalent of two weeks' salary and benefits per year, or pro-rated for service of less than a year, to the national Interim Ministry Sabbatical Fund;
 - (b) applications are submitted by November 15 for a sabbatical in the coming pastoral year, July 1 to June 30.

The Interim Sabbatical Fund is administered by the Financial Assistance Committee of the General Council.

DISENGAGING POLICIES

Retirement

Retired

Within the context of The United Church of Canada, the term “retired” means the ministry personnel

1. is in receipt of pension benefits from the pension plan of The United Church of Canada; or
2. has attained the age of 71 years and is therefore ineligible to contribute to the plan.

Clarification

A member who is in receipt of a pension from another employer’s pension plan but is not in receipt of a pension from The United Church of Canada pension plan is not considered “retired” for United Church purposes. Such ministry personnel are not eligible to serve as “retired supply.” A minister who receives a pension from another employer’s pension plan and who subsequently begins a call or appointment to a United Church pastoral charge must participate in the entire applicable pension and benefits plans unless they have already reached the age of 71 years. Federal government regulations require Canadians when they attain the age of 71 years to begin drawing any registered pension that they have.

A Change in Employment Status Is Required

In order to receive pension benefits, federal government regulations require that plan members must cease being employed or, if continuing in employment, must have a genuine change in the status and function of their employment. This is addressed in Section 9.01 of the Text (formerly known as The Constitution) of The United Church of Canada pension plan.

Questions?

For more information on any of the pastoral relations polices, please contact the Ministry and Employment Unit of the General Council Office, or your local Conference office. Contact information for Conference offices is available on the United Church website (www.united-church.ca/contact/conferences).

Ministry and Employment Unit
General Council Office
The United Church of Canada
3250 Bloor St. West
Toronto, ON M8X 2Y4
www.united-church.ca

Toll free: 1-800-268-3781 ext. 3037 or 3146

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