

Unity Santa Fe

Ministerial Transition Process

Laying Out the Path

Phase II Report: March 31, 2021



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Summary of Process

A total of thirty-one people attended one of the two Phase II sessions: eighteen on Friday, March 26 and thirteen on Saturday, March 27. Each session began with a brief check-in for the whole group. Most of the rest of each session was spent in two approximately equal-sized breakout groups, brainstorming responses to this question: *Given the list of values / needs / qualities of life generated in Phase 1, what specific strategy ideas will bring these qualities to life?* Finally, the groups shared the resulting strategy ideas from their breakout in the large group.

After the session, Gregory compiled a combined list of the strategy ideas and then organized the list by grouping like items. Finally, he created an organized list with category and sub-category labels, shown below. The combined, unprocessed and unordered list is available in a separate document as an appendix to this report.

Summary Outline of Category Labels

Here is an overview of the categorization created by Gregory. Please see the next section for the complete outline.

- I. **Defining and Attracting What We Want**
 - a. *Philosophy*
 - b. *Specific Qualities*
- II. **Preparation**
 - a. *Internal*
 - b. *External*
- III. **Search**
 - a. *Mechanics*
 - b. *Participation*
 - c. *Candidates*
 - d. *Options*
- IV. **Selection**
 - a. *Philosophy*
 - b. *Assessment*



Categorized Outline of Strategy Ideas

This outline is intended to form the basis of the work in Phase III, creating a robust Ministerial Transition Plan that is ready for implementation. The labels, categorization and ordering of items are all preliminary and may be changed and adapted during Phase III.

I. Defining and Attracting What We Want

a. Philosophy

- i. Create a vision/affirmation for the perfect minister.
- ii. In what direction do we want to grow.
- iii. Individuals write out vision/affirmation for perfect minister.
- iv. Look at what we want, moving forward. What works and what doesn't for us. Determine the qualities we want, where we are and where we want to go.
- v. The list should be used as an opportunity to have dialogue with the candidate.

b. Specific Qualities

- i. Bilingual candidate.
- ii. Minister adaptability to Santa Fe.
- iii. Open to new ideas, growth and youth.
- iv. Spiritual Mediums, other opportunities for spiritual connection
- v. We seek someone who has the same vision of where we want to go as a Unity CommUnity.

II. Preparation

a. Internal

- i. A lot of people have left Unity ... it might be worth finding out why they left, what spiritual community did they join (if any) and what vision would they have for a new minister.
- ii. Appreciative Inquiry on Brendalyn and on our congregation. (We've done this in the past.)
- iii. Create a short Unity community prayer for being guided to our next minister.
- iv. Create a timeline.
- v. Creating patience for the time required to complete the process.
- vi. Develop a profile of our ideal minister. Identify the qualities we want/need in a new minister.

- vii. Develop a way of polling membership once we have developed strategies to arrive at consensus about how to proceed.
- viii. Encourage a participatory group process, where everyone's voice is heard.
- ix. Either way we go, if we're sensitive to one another and come from Unity principles it will work out.
- x. Establish a process up front for handling disagreements.
- xi. Figure out how being mission centered versus minister centered impacts what we look for in a new minister.
- xii. Guidance by Holy Spirit within (wisdom, knowing).
- xiii. Figure out how we clarify whether we go immediately to a new minister or have a transition minister first.
- xiv. If there are some things that Brendalyn does that the new minister will not be doing, who will handle those duties?
- xv. Plan for Brendalyn's departure - closure.
- xvi. Respect the process.
- xvii. Set up a web page where we can see a calendar, documents, results to date, results of polls, what's coming up.
- xviii. Website should include a blog where people can offer ideas and responses to each other.
- xix. Start the process while we still have Brendalyn (continuity).
- xx. Trust in process and trust in Divine order.
- xxi. Watch and reflect on our attitudes/energy - need some ground rules so that we won't get locked into a specific position.
- xxii. We need to, as the church community, identify ideas and needs for the church's future - it's not just about the minister.
- xxiii. What (Myers-Briggs) types of personality do we want in a new minister? Suggests that we survey the congregation to determine personality types of each member; of each BoT member; of each of the Search Committee members, of the staff... that way we get a good fit in personality types, and which type would best fit our needs and wants. Mesh the values together.
- xxiv. What are the new minister's roles and duties?
- xxv. What do we have in place already?
- xxvi. Survey congregation asking what we see as our future, and to define our goals. regarding what direction we want to grow. Willingness to join the process rather than control it.

b. External

- i. Ask friends in other cities if they know of inspiring ministers – networking.
- ii. Because all churches go through this from time to time, get wisdom from Unity HQ on how to involve the entire congregation in this process.
- iii. Connect with the Unity department that connects ministerial candidates with churches looking for a new minister.
- iv. Clarify the steps in the process to getting both an interim minister and a permanent minister.
- v. Establish common questions for bio submission.
- vi. Contact Centers for Spiritual Living about available ministers.
- vii. Contact other Unity's where they have changed ministers.
- viii. Create a job posting for the new minister.
- ix. Focus on the values we are looking for & Unity's values. Be open to new values that we are not yet aware of.
- x. Go wherever we want to choose whomever we want, not necessarily Unity minister.
- xi. Develop a way to communicate to candidates how we have been doing things and then hear their new and different ideas.
- xii. Look at ministers in college towns whether "on the list" or not.
- xiii. Look at other large Unity centers for associate ministers looking to relocate.
- xiv. Transparency and honesty on both sides. The minister needs to know all about us, including where we fall short. And we need to be clear on our strengths.
- xv. Understand the process or steps that ministers who are looking for a new church go through - how do they find out and follow up on possible opportunities.
- xvi. What are the best practices? What has been successful for other churches? What worked and what didn't?
- xvii. What does a minister want in a church? Are there some guidelines?
- xviii. What is already known about what has worked and what hasn't in the process. Take advantage of the experience that other churches have had.

III. Search

a. Mechanics

- i. Be open to SHARED VALUES. Wants to share what other churches are doing/how they are thriving/what's trending. Be open to other resources.
- ii. Biweekly meetings mapping out this process and getting people's input.
- iii. Decide how many parishioners should give input to the need for an interim minister and the overall timeline.
- iv. During church services, from time to time have a few speakers from Unity village and/or other churches talk about what churches and parishioners go through during this process.
- v. Clarify the steps.
- vi. Intensive management of our church office.
- vii. Support the use surveys to determine all the above.

b. Participation

- i. Anonymous suggestion box.
- ii. Decide whether only members or all participants can have input.
- iii. Encourage silent congregants to participate to make sure everyone is heard, including incorporating the opinions of the minority.
- iv. Final decision not left to the Board alone. Members from Board and congregation on a committee. Congregants to have final decision.
- v. We need as much participation in the process from our congregation as possible. If we're not united in this, we won't be able to find someone who serves the needs of the entire congregation.
- vi. Utilize SOUL Circles (open communication).
- vii. Establish a varied and curious selection committee (old, new, young, mature).

c. Candidates

- i. Develop process of interviewing prospective ministers.
- ii. Get worldwide speakers.
- iii. Have guest speakers present as an audition.

- iv. Decide how to communicate to candidates how we have been doing things and then hear their new and different ideas. Be open to new values that we are not yet aware of.
- v. Listen to new minister's ideas on drawing all age groups and different cultures. Develop ways to make them feel welcome.
- vi. Partnership in a pursuing common goal, a sense of working together by open communication.

d. Options

- i. Clarify the steps in the process to getting both an interim minister and a permanent minister.
- ii. Have a deadline for deciding whether or not to have an interim minister.
- iii. Have guest speakers - in auditions.
- iv. Find and invite a transitional minister for about a year (organized, partnership).
- v. If there are some things that Brendalyn does that the new minister will not be doing, decide who will handle those duties.
- vi. If we have an interim minister, define their role and duration of service.
- vii. Option of having 2 ministers instead of 1.
- viii. A transitional minister or series of speakers would give us time to see who we are as a community without Brendalyn.
- ix. Ensure there is understanding regarding the temporary minister's impact.

IV. Selection

a. Philosophy

- i. Be aware that this is not a lifetime appointment.
- ii. Common questions for bio submission.
- iii. Develop process of interviewing prospective ministers, and make sure the interview process is straightforward.
- iv. Communicate to candidates how we have been doing things and then hear their new and different ideas. Be open to new values that we are not yet aware of.
- v. The list should be used as an opportunity to have dialogue with the candidate.

- vi. Ensure transparency and honesty on both sides. The minister needs to know all about us, including where we fall short, and we need to be clear on our strengths.
- vii. . Find out what worked in other spiritual centers/communities.

b. *Assessment*

- i. Check references! Not doing this might result in a bad hire.
- ii. As part of reference check, interview board members from current and previous assignments.
- iii. Deep, college level discussions and broader concepts beyond Unity teachings.
- iv. Get community feedback about various ministers/speakers
- v. Have Zoom sessions with candidates, with surveys following.
- vi. Interview the congregation that the potential minister has served/is currently serving.
- vii. Look at the whole person (candidate), and their family and their family situation. The new minister will be bringing their family as well.
- viii. Ascertain the new minister's ideas on attracting all age groups and different cultures. Ours to do, ways to make them feel welcome.
- ix. Q & A and social interaction with potential candidates to see how they connect.
- x. Plan for several Zoom messages by each candidate -- to ensure consistency in message presentations.
- xi. We need to be clear on our goals moving forward, so that we can match these goals with the new minister. That way, if the minister isn't as strong in one area, there are others who are. (Second minister?)
- xii. Visit website of prospective minister to see what else they are involved in.
- xiii. Invite visiting ministers (possible candidates) on Sundays and request self-created bios from ministers.
- xiv. Identify what the long term and short-term goals are. What did the candidate do at their previous congregation? Did what they did before mesh with our current goals?
- xv. Provide opportunities for available ministers to give Sunday service(s) on Zoom (humor, authenticity).



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Looking Ahead: Phase III

This outline is intended to form the basis of the work in Phase III, creating a robust Ministerial Transition Plan that is ready for implementation. Phase III will be accomplished by a seven-member Transition Team selected by the BOT. Here is a suggested workflow for the team:

1. Review and refine the outline shown above.
 - a. Add, remove or edit category and/or subcategory labels.
 - b. Add, move or remove items among categories.
2. Identify strategic or logical gaps in the outline and develop strategies to fill them.
3. Refine the outline into an implementable plan.
4. Seek congregational feedback on the plan.
5. Approve the plan.
6. Implement the plan!