

# **Joint Needs Assessment & Joint Search Committees**

**A Training Workshop**

# Workshop Outline

- Welcome and introduction to format
- Purpose of the Joint Needs Assessment and Joint Search Process
- How to lead Joint Needs Assessment Committees through the process
- Purpose of the Joint Search Process
- How to lead Joint Search Committees through the Process

# Welcome and Introduction to this Format

# Purpose of the Joint Needs Assessment

- 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 District

# Joint Needs Assessment Process

## 15 Step Guide

### Step 1 - Initiating the Process

- The District is responsible for initiating a Needs Assessment Process if:
  - The Pastoral Charge or a ministry personnel in a Pastoral Charge asks for a change in pastoral relations
  - The Pastoral Charge, the governing body, or a ministry personnel ask for a needs assessment
  - The District recognizes that a change of pastoral relations is needed because the minister has died or is incapacitated because of a disability
  - The Pastoral Charge is considering a change in the terms of the pastoral relationship
  - As part of the discipline or oversight of the ministry personnel or the Pastoral Charge

## Step 2 – Who Makes up the Committee

- The Needs Assessment process is conducted by a committee called the Joint Needs Assessment Committee – Joint between the Pastoral Charge or Ministry Unit and the District
  - The District must elect two representatives
  - The Pastoral Charge at a joint congregational meeting or its governing body elects as many members to the Joint Needs Assessment Committee (JNAC) as it deems necessary to represent the community; between 4 – 10 members

## Step 3 – Who Calls the First Meeting

- The first meeting of the Joint Needs Assessment Committee (JNAC) is normally convened by one of the representatives from the District.

## Step 4 – What Happens at the First Meeting

- Decide who will chair the meetings; this does not need to be one of the District representatives.
- The JNAC must decide on quorum for the committee.
- The JNAC must decide on its own process
  - Decide how the tasks of gathering information for the report will be divided (Appendix A)
  - Gather information about ministry personnel needs in a way that is open and allows for the congregation to participate (this could be a survey or discussion forums (Appendix C)
  - Make sure contact has been made with the District Manse Inspection Committee if one is needed

## Step 5 – What Do we Do with the Information Gathered

- Analyze the information gathered
- Prepare a report which includes the six profiles
  - The Community of the Pastoral Charge
  - The Resources of the Pastoral Charge
  - The Ministry of the Pastoral Charge
  - The Ministry Personnel Position Description
  - The Terms of the Ministry Personnel Position(s)
  - Skills and Knowledge Required of the Ministry Personnel

The guide to the different profiles is found in Appendix B or page 10 of the Pastoral Relations: Engaging and Supporting Handbook.

## Step 6 - Where Does the Report Go

- The Joint Needs Assessment Committee notifies the governing body when the needs assessment report is completed

## Step 7 – Who Receives the Report from the Governing Body

- The governing body circulates the report and a notice of meeting to all members of the governing body, including the 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.

## Step 8

- The JNAC presents its report to the governing body. The governing body makes decisions on each of the recommendations made by the JNAC.
  - (possible recommendations are found on pg. 13)

## Step 9 – East District Process

- The Pastoral Charge treasurer fills out the Finance and Administration form and submits it to the chair along with the draft copy of the JNA – Pastoral Relations chair receives a copy of the JNA.

## Step 9 - West District Process

- West District wants to see a three-year projected budget to make sure that a Pastoral Charge can fund ministry for at least the three years.

## Step 10 – After the Governing Body Meeting

- The governing body sets a date for a meeting of the Pastoral Charge. The Pastoral Charge receives a summary report, the recommendations of the JNAC, and the decisions of the governing body. The full JNAC report is available on request. The notice of the meeting and summary report is given out in the following order:
  - To all ministry personnel in the Pastoral Charge, and, at the same time, to the secretary of the District; and
  - To the members of the Pastoral Charge

## Step 11 – Notice of Meeting

- The notice of the 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.

## Step 12 - Decisions

- The Pastoral Charge must make decisions on each of the recommendations of the JNA

## Step 13 – Further Action of the Pastoral Charge

- Once the Pastoral Charge has made a decision on the recommendations, further action is necessary at the same meeting of the Pastoral Charge
  - If the decision is to request the District 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.

- If the decision is to request the District to appoint a supply minister for up to one year, then the District may act on the request and;
  - Appoint a supply minister; or
  - Direct the Pastoral Charge to recommend a supply minister to the District for appointment. In anticipation of the 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

- If the decision is to request that the District appoint an interim minister, the Pastoral Charge must elect, or authorize the governing body to elect, representatives to an Interim Ministry Transition Team.
- If the decision is to request the District 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 District.

## Step 14 – Where Does the JNA Go After the Pastoral Charge

- Once the Pastoral Charge has completed its work, the Pastoral Relations Committee makes recommendations to Ministry Personnel and Education – then to the District Executive for final approval.

# Joint Search Committee

- The purpose of this committee is to search for and recommend a ministry personnel for the open position on a Pastoral Charge.
- They can appoint as many members to the JSC as it deems necessary to represent the community; between 4 – 6 members makes a functional committee. (Ministry personnel called or appointed to the Pastoral Charge may not serve as members on the committee)

# Policies and Procedures

- 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 District.
- A search process **may** also be used when the District appoints a ministry personnel to the Pastoral Charge

- The mandate of the JSC is determined by the Joint Needs Assessment recommendations and report, including:
  - the number of positions that need to be filled;
  - the position description for each position;
  - the skills and knowledge needed by the ministry personnel for each position; and
  - the terms of each position

- The search is conducted by a committee called the Joint Search Committee. The Joint Search Committee consists of:
  - two representatives from the District, elected by the District; and
  - representatives of the Pastoral Charge, elected by the Pastoral Charge or its governing body.

- The District representatives are responsible for calling the first meeting of the JSC

- At the first meeting, the JSC is responsible for setting the process that it will follow. Its work is confidential.
  - The JSC 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 District.
  - The JSC recommends a budget for the search and selection process, that is approved by the governing body (that is for travel for interviews, travel to a worship service of a prospective applicant, postage to send out Joint Needs Assessments if not done electronically.)

- The JSC is responsible for reporting regularly to the Pastoral Charge about the process.
- Even though there is a great deal that is confidential about this process, the congregation needs to know what stage the JSC is at.

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

- 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.

- It is the responsibility of the JSC to ensure that the final applicant has a current Vulnerable Sector (Level 2) Police Records Check. The committee may keep a copy for their records.

- The District or the chair of the annual meeting must call a meeting of the Pastoral Charge or congregation to receive the commendations of the JSC. The convenor of the Pastoral Relations Committee or an appointee must chair this meeting.
  - Before giving notice to the congregation or Pastoral Charge, the person calling the meeting must give notice to the secretary of the District and the ministry personnel settled in or appointed to the Pastoral Charge.
  - 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.

- The JSC is responsible for keeping the name of the final applicant confidential until the meeting of the Pastoral Charge – if issuing a call
- or the governing body where the motion is to issue an appointment.

- The JSC is responsible for
  - Recommending a member of the order of ministry for the call to the Pastoral Charge.
  - Or recommending a ministry personnel for the appointment to either the Pastoral Charge or its governing body.

- The Pastoral Charge must vote on the recommendation(s) of the JSC. The options open to the Pastoral Charge are
  - To accept the recommendation(s); or
  - To not accept the recommendation(s)

- If the Pastoral Charge accepts the recommendation(s) of the JSC, copies of the motion(s) carried by the Pastoral Charge and the Pastoral Relations forms must be sent to the District

- The District is responsible for acting on the decision of the Pastoral Charge: making the appointment, or approving the call.

- The District is responsible for providing an act of covenant between the ministry personnel, the local ministry and the District.
  - The Search Committee including the District representatives normally take the lead.

# Recruitment Process

This is both formal and informal

- **Formal**

- Placing the church on the vacancy list – This is a national list which ministry personnel can look at to see which churches are vacant.
- Our Newfoundland and Labrador Conference Website – just send the ad to our webmaster – Greg Forward
- Advertise in the Observer

- **Informal**

- Check the year book
- Check our settlement report
- Invite recommendations from members of the Pastoral Charge and others
- Ask the Conference Personnel Minister

# A Communication Process

- The committee may decide to identify one person to address application packages and to offer an email address where resumes can be delivered.

- JSC should communicate with applicant at least 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.
  - To notify all other short-listed applicants that an applicant has been chosen.

- The JSC also needs to communicate with the governing body
  - Names of committee members
  - Number of meetings held
  - Number of inquiries received
  - Number of interviews and
  - Assurance that the same criteria will be used to evaluate all applicants

The District representatives do not need to be present when updates are being given.

# Evaluation Process

- Generally consists of a resume, eligibility check, interview, visit during worship and references.
- Each member of the JSC should read all resume
- The JSC is responsible for conducting interviews on behalf of the Pastoral Charge. Remember an interview goes both ways – the applicant is also interviewing the Pastoral Charge.

- Consider the following courtesies
  - Arrange for transportation and accommodations 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
  - Have Search Committee members introduce themselves
  - Search Committee member begins with a prayer
  - Provide a clear description of the process
  - Allow time for the applicant to ask questions
  - Arrange for someone to accompany the applicant to their car or transportation after the interview

# What to Ask About in the Interview?

- Past ministry
- Theology
- Call (what calls you to this positions and community)
- Why are you considering a change in pastoral relations
- Past educational experience
- Continuing education
- Conflict management
- Strengths in ministry
- Areas of growth
- Experience solo/team
- Church administration
- Time management
- Self-care

# Evaluating the Applicants

- Members of the JSC may choose to visit an applicant's congregation to see their leadership style.
- The JSC must check references and asking for a reference from the Pastoral Charge the applicant is leaving is important.

# Negotiating Terms

- It is up to the JSC to negotiate terms – anything that is above the minimum amounts both in time and financial should be negotiated by the Search Committee and if it is above what has been budgeted from the beginning, then the JSC must ask the governing body for approval.
- Once the whole process is complete, the appropriate forms need to be filled out with the appropriate signatures and sent to Pastoral Relations for approval.

# You are Not Alone!

- This is a very lengthy process and a very technical one. Please know that there is help. You can call the chairs of the Pastoral Relations Committee and you can also call the Conference Personnel Minister with any questions you or the committee may have.
- The handbook is a very valuable tool as well.

- **Thank you for your attendance this evening.**