



Pacific Northwest District

Unitarian Universalist Association of Congregations

---

# Consultants Handbook

Rev. March 8, 2012

# PNWD Consultants Handbook

## Table of Contents

District Consulting – Purpose and Practice ..... 1

Assumptions Guiding PNWD Consultations ..... 2

Confidentiality Policy ..... 3

Assignment Process ..... 4

Evaluation Process ..... 5

Fees and Expenses..... 5

Documents referenced in this handbook may be found on the various Resource Sites maintained for each consulting team , and may also be found on the PNWD website, at <http://www.pnwd.org/resources/consultingservices.aspx>.

# District Consulting – Purpose and Practice

District Consultants are lay and clergy volunteers appointed by the District Executive or Program Specialist to assist PNWD member congregations in becoming and sustaining thriving church communities. Consultants are chosen based on the qualifications and sensibilities necessary to the work required, including excellent communication skills and the ability to uphold the highest levels of confidentiality.

PNWD Consultants commit to (1) attending required orientation and ongoing training meetings, (2) submitting written reports as required, (3) providing timely and appropriate communications with the District Executive, Program Specialist and/ or others related to the work, (4) accepting facilitation assignments as needed, in rotation with others, and (5) serving for at least three years. District Consultants must be members in good standing or affiliated religious professionals of PNWD congregations.

Consultants assigned to conduct services to congregations are provided travel expenses and consulting stipends according to current District fee and reimbursement schedules. Consultants volunteer their time to participate in orientation and training meetings, and to prepare for and travel to and from assignments.

To ensure that consulting services remain widely available to all member congregations, some services may require cost sharing by recipients. Cost sharing will be disclosed at time of contracting. Invoices to congregations will be issued by the PNWD. Occasionally, fees may be discounted, waived or deferred at the discretion of the District Executive. Consultants are welcome, but not expected, to donate all or part of their stipends or expense reimbursements to either the District or the congregation served.

PNWD consulting services are made possible primarily through the voluntary service of the consultants and the shared contributions of member congregations to District dues and the UUA Annual Program Fund.

Requests from congregations which are not PNWD members will be granted at the discretion of the District Executive only as resources are available. Such services will be charged at premium rates (no discounts). Congregations which are not current in District or UUA dues are also subject to premium rates, and will be expected to work with the District Executive to achieve full fair share status, as a condition of receiving consulting services.

# Assumptions Guiding PNWD Consultations

- † Ministry is shared and involves the congregation, lay leaders, professional ministers and staff.
- † All involved -- clergy, staff and laity -- want the good health and successful continuance of the congregation. We assume best intent in all communications and actions.
- † Clear and open communication is essential to understanding.
- † Consultants are accountable to the congregations they serve, to each other, to their team leader, and ultimately to the District Executive.
- † At all times, District consultants are considered to be PNWD volunteers. We are grateful for your service to Unitarian Universalism!
- † As representatives of the PNWD, consultants observe professional conduct and appropriate demeanor.
- † Recognizing that there is a difference between “secrets” and confidentiality, District Consultants respect at all times the sacred trust of confidentiality and follow established guidelines related to this trust.
- † District Consultants refer congregations to other District and UUA resources as appropriate. New or extended consultations are approved by the District Office prior to commitments.
- † District Consultants are not prohibited from entering into private consulting contracts with PNWD Congregations. However, such arrangements are disclosed to the District Executive, and are obvious in their separation from PNWD Consulting work.
- † Lapses in professional conduct, violations of trust, poor performance or inability to serve result in termination of service as a District Consultant. Personal discernment about ability to serve is expected of all consultants.
- † We are committed to continuing to improve our skills and gifts.

# Confidentiality Policy

District consultants are often privy to sensitive matters in the course of their services. In general, consultations and ensuing reports are considered to be the property of the congregation. Copies and content of consulting records will be kept in confidence by consultants and by the District Office.

In some cases, the UUA Transitions Office or other entities may request copies of assessment reports. Such requests will be presented by the consultant or District Office to congregational leadership (elected officials and called professionals), whose decisions on sharing will be honored. An exception will be reports which are required by the UUA, such as exit interviews at the time of ministerial transition. These requirements will be disclosed prior to the conduct of any interview or assessment.

District consultants will not be “keepers of secrets.” Consultants uphold open and direct communication as healthy practice, and do not advance triangulated conversations by passing anonymous information to third parties.

Consultants will immediately disclose to the District Office any information or observations which indicate possible sexual misconduct, physical or psychological abuse, serious professional, ethical or legal lapses, or any other practices or circumstances which may cause injury to individuals, significant harm to the congregation, or considerable damage to the UUA.

Consultants meet regularly for training and professional development and may sometimes share case studies to advance learning. Details specific to congregations are kept confidential among the consultants. We do not take stories of specific congregations back to our families, friends, or our own congregations. As consultants, we may use anonymous, non-identifiable examples of what we have observed or experienced in one congregation when we are working with another congregation. Part of our training is to learn how to make such examples work without revealing identifying details, so that confidentiality can always be honored and maintained.

# Assignment Process

1. Congregation contacts or is referred to District Office to request consulting services.
2. District Executive or Program Specialist assigns a consultant or refers to Consulting Team Leader for assignment. Consultants must obtain advance approval from District staff prior to confirming an assignment.
3. Consultant or Team Leader obtains details from the congregation, reviews fees, options and expectations of the congregation, confirms the consulting assignment, completes the PNWD Consulting Service Agreement, and immediately sends one copy each to the consultant, the congregational contact, and the District Office.
4. At the first on-site meeting, Consultant signs the congregation's copy of the Consulting Service Agreement and obtains the signature of the authorized congregational representative on the consultant's copy. Consultant forwards this copy to the District Office immediately after the first on-site meeting.
5. If any substantive revisions are made to the Consulting Agreement, including extension of services, Consultant obtains approval of Team Leader, then provides congregation and District Office with a written addendum to the agreement.
6. As soon as possible following completion of the assignment (and no later than 90 days), consultant
  - a. writes a brief report of services rendered,
  - b. completes a Payment Voucher, attaching any receipts
  - c. forwards all documents immediately to the District Office to initiate payment to the consultant and invoicing of the congregation.
7. Please submit Consulting Service Agreement and Payment Voucher to the District Office even if you have volunteered your services and/or have no expenses to claim!

# Evaluation Process

Following completion of a consultation, the District Office will send a standard evaluation form to the President, Minister, and/or congregational contact, requesting feedback on the visit. This will be standard practice regardless of whether the service was provided by a volunteer consultant, the Program Specialist or the District Executive.

Feedback obtained through this evaluation process will be used to improve District services, and to encourage growth and excellence of consulting services. The District Executive or Program Specialist will share feedback with volunteer consultants on a regular and timely basis. If concerns arise, staff will work with volunteers to discern training needs or fit with the consulting program.

Evaluations of services conducted by the Program Specialist will be reviewed by the District Executive. Evaluations of services conducted by the District Executive will be reviewed by the President of the PNWD Board of Directors. Such feedback from congregations will be used constructively by the PNWD and UUA Director of Congregational Life to support regular performance appraisals of District staff.

# Consulting Fees and Expenses

The consultant will be reimbursed for expenses and will be provided the appropriate stipend by the District when the payment voucher is received. PNWD will pay the consultant within 2 weeks of receiving a voucher regardless of when or whether the congregation pays its cost share.

- Please note that no funds are due the consultant if
  - the consultation was not approved in advance by the District Executive or Program Specialist, or if
  - the payment voucher is not received within 90 days of completing the assignment.

Contracting congregations will be invoiced by the District following completion of services, according to current District rate schedules, available on the PNWD web site. Fees and billing practices may change from time to time. Congregations will be invoiced according to the fee schedules in effect at the time the Consulting Service Agreement is finalized.

Congregations will typically pay the consulting stipend and some or all of the hosting and other expenses of the consultants, for example:

- ◆ Copying or printing costs
- ◆ Postage
- ◆ Fax charges and long distance phone calls
- ◆ Hotel and meals (if necessary) at actual receipted costs

NOTE: Consultants are encouraged to accept home hospitality, though they may prefer or require neutral accommodations. This decision is left to the individual consultant.

Consultants will be reimbursed for mileage at the prevailing IRS volunteer rate (\$.14 per mile in calendar year 2012), and for ferry tolls, parking fees, and/ or air transportation at actual cost. Rates may be adjusted annually or as needed, usually effective with the PNWD fiscal year starting July 1. Mid-year adjustments will be made only in unusual circumstances.

Consultant transportation costs will be covered by the District for Fair Share congregations, to ensure that contracting congregations receiving core services are not unduly burdened by distance from the consultant's home base. In some cases, such as when congregations have received multiple consulting visits, the District Executive may require that the congregation pay some or all of the transportation costs. Congregations that are not Fair Share are responsible for all travel costs.

Fees due from congregations will be clearly defined in the Consulting Service Agreement. In cases where the congregation is in dire financial straits or has special circumstances, the District Executive may waive some or all of the consulting fees, or may arrange a deferred payment schedule. The District's priority is to help congregations thrive ; member congregations are expected to provide full fair share contributions to the PNWD and UUA and to reimburse the consulting budget according to the plan determined with the District Executive.

## Documents and Resources

Documents referenced in this handbook may be found on the various Resource Sites maintained for each consulting team , and may also be found on the PNWD website, at <http://www.pnwd.org/resources/consultingservices.aspx>.