

Lancaster Theological Seminary

**Competency-Based Assessment for Ministerial Authorization  
in the United Church of Christ:  
A Model for Implementation**

A Major Project Submitted to the Faculty  
in Candidacy for the Degree of  
Doctor of Ministry

by

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Competency-Based Assessment for Ministerial Authorization in the UCC  
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## Abstract

Knowledge is readily available today with Google and other search engines designed to answer any question. However, the integration of knowledge into understanding and competency is not as straightforward. To address the challenge of integration of knowledge and competency for ministerial authorization, this project follows Richard Osmer's four tasks of practical theology and looks at the United Church of Christ's (UCC) *Marks of Faithful and Effective Authorized Ministers* alongside principles of competency-based assessment. The project presents a working model for UCC Committees on Ministry across the denomination for implementation of the new *Manual on Ministry (MOM)*. The new MOM embraces a single form of authorized ministry and the use of the competency-based *Marks* with all ministerial candidates, seminarians, and those on alternative paths to authorization. Alongside a model for UCC Committees on Ministry, this project opens doors to further change in the UCC's process and points to possible implementation of competency-based assessment programs in other denominations.

This project opens with a glossary and the state of the field in Chapter 1 leading to the research question on how the UCC might move to embrace the *Marks* and develop an implementation strategy for using them in a true competency-based approach. Chapter 2 includes a literature review. Chapter 3 offers a glimpse at how the education world uses competency-based assessment and offers five principles for how their use might be carried over into the assessment work of UCC Committees on Ministry. Chapter 4 presents the model for how one UCC Conference implemented this use and Chapter 5 draws conclusions and points readers forward to possible application of a competency-based assessment model in their own setting.

## **Dedication Page**

Mike, Mckenzie, Joshua - Mom & Dad

Thank you for so very much

I love you

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## **Chapter 1 Introduction**

**Introduction**

**Glossary of Central Terms**

**Research Question**

**State of the Field**

**Type of Project**

### **Introduction**

When I was in college, I worked on the summer staff of our United Church of Christ camp, Johns River Valley Camp in Collettesville, NC. Each year the staff was sent to a YMCA camp in South Carolina for a week of specialized training by recognized trainers in a variety of camp activities. One year I spent part of the week becoming a National Archery Association Certified Instructor to meet the American Camping Association requirements for our camp. I was awesome in the classroom. I knew all the safety equipment and how to set up a shooting range. I could label all the parts of the bow and arrow and could instruct on proper handling and maintenance. I drew out lesson plans and range activities for different age groups of campers. I was clearly the top student. Then we went out to the range. I was tossing hay bales and setting perimeters, hanging targets and prepping equipment. My hard work was continuing to earn the praise of the instructors. Many of my colleagues were anxious to get on the firing line. I was much more hesitant. I had never fired a real bow. I had used Nerf toys and suction cup arrows but in my hands was a recurve bow with metal tip arrows that could really do some damage. And from the firing line, my arrows found hay and dirt, but rarely the target circles, damaging only my self-confidence.

I had received certification based on my competency in establishing a safe environment and proper instruction for campers to experience an introduction to archery, for which I needed to demonstrate knowledge of how to instruct for safety and mechanics. There was no expectation

that I would shoot accurately. I demonstrated high competency and won several awards from classmates and instructors. The problem for me was that I could not hit, with any degree of accuracy, a 4-foot multi-circle target.

Fast forward to today when I work with Committees on Ministry (COM) charged with determining a candidate's preparation, formation, and readiness for ministry. Seminaries have long been tasked with the majority of candidate assessment and have continued graduating ministry candidates who excel in the classroom, yet some have not proven themselves capable of successfully pastoring a church. Seminaries continue to provide important academic preparation, but so many ministerial candidates are coming into professional ministry as their second careers that a different model is needed. Residential seminaries do not meet the needs of students who are in a more advanced stage of life. Seminary debt is also a growing concern. The General Synod of the UCC in 2013 heard a resolution on adding a national church offering designated to assist with offsetting seminary debt.<sup>1</sup> Those preparing for ministry after years of service in another field bring a number of skills and a range of knowledge from the outset that should be affirmed and assessed for use in professional ministry, even as those entering seminary directly out of college need both the academic rigor of seminary and the practical experience that field education and clinical pastoral education have to offer.

It is important to recognize that I come to this work fully immersed in the United Church of Christ (UCC) and the work of local Association Committees on Ministry. I also taught high school social studies before actualizing my call to professional ministry. The combination of my teaching career, UCC experience, and observations of UCC candidates caused me to start asking

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<sup>1</sup> "Resolution for an All Church Offering for supporting the educational expenses of Members in Discernment preparing for Authorized Ministry of the United Church of Christ," UCC Files, UCC, accessed December 18, 2021. <http://uccfiles.com/pdf/gs29-5-SeminarianDebt.pdf>.



a number of questions about whether we are collectively hitting the mark with our work – as pastors, as leaders, and as those who prepare future pastors and leaders. My background and those questions came together in this project.

The work presented here has broad application in ministerial preparation across many denominations, and I do not want the UCC acronyms or education language to be a barrier to mutual understanding. This project establishes explicit links between competency-based assessment as practiced in the field of education and the UCC expectation of a learned clergy. The primary audience for this project includes those in UCC judicatory ministry, those serving on our Committees on Ministry and members in discernment who would all be familiar with much of the ecclesial terminology and acronyms used throughout, but I invite all readers to start in the same place in terms of the vocabulary I will use. The national setting of the UCC through General Synod Resolution and resulting policy has codified the *Marks of Faithful and Effective Ministers*<sup>2</sup> as the competencies needed for authorized ministry in our denomination. In broad terms, local committees charged with the implementation of that policy struggle with both letting go of the long-held requirement of a seminary degree and the call of this new policy to assess candidates for academic as well as practical knowledge and skills. Herein I present a bridge for local committees to understand the competency-based assessment work I believe is being asked of them in educational terms and offer an implementation model that is working for the Penn Central Conference. Theological education is still vital in candidate formation. Competency-based assessment opens the ways in which that is accomplished to paths beyond seminaries and divinity schools. The question that guided me was how UCC Committees on Ministry could engage these *Marks of Faithful and Effective Authorized Ministry* in assessment of their

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<sup>2</sup> Appendix 2

candidates for ordination, both seminarians and those coming to professional ministry via alternative paths. Ecclesial and education fields each have their own vernacular, so before moving too swiftly into either, I offer below a brief glossary for clarity and accessibility of all readers.

## **Glossary of Central Terms**

The National Council on Measurement in Education defines **assessment** as “a process designed to systematically measure or evaluate the characteristics or performance of individuals for purposes of drawing inferences.”<sup>3</sup> For this project, I understand assessment as a measurement of the candidate’s mastery of knowledge and skills as outlined in *The Marks of Faithful and Effective Authorized Ministers in the United Church of Christ* eight competency categories.<sup>4</sup> Across the UCC there are different ways to do assessment for ministerial candidates with the most popular method being a committee review of transcripts. A transcript reflects a variety of instructor-based assessment practices and when the committee receives the transcript, their assessment occurs in an instant. For the committee it is a judgement on if and how well a candidate has completed a course of study. In this project I approach assessment as ongoing action. No one moment can fully capture this, rather it happens over time as multiple artifacts from a person’s field are examined and weighed. Assessment as ongoing action can see growth and/or potential for continued growth in a candidate.

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<sup>3</sup> “Assessment Glossary,” Resources, National Council on Measurement in Education, accessed June 19, 2020, <https://www.ncme.org/resources/glossary>.

<sup>4</sup> See Appendix 2 for a full listing of the *Marks*.

**Competencies** are “the combination of skills, abilities, and knowledge needed to perform a specific task.”<sup>5</sup> **Competency-based assessment** for ministerial candidates asks committees to shift from more traditional objective based and knowledge banking assessments (instantaneous judgements) to measuring behaviors and application of knowledge or competencies (seen in actions over time). Competency-based assessment is learner-focused and assesses what they already know and can demonstrate. It then allows the assessor to point toward future learning needs based on a desired set of outcomes. In ministerial preparation for authorized ministry in the UCC, those desired competencies are in the eight competency categories of *The Marks of Faithful and Effective Authorized Ministers*. Commonly called **The Marks**, or simply *Marks*, they are designed to measure a candidate’s preparation, formation, readiness, and competency for authorized ministry in and on behalf of the United Church of Christ.<sup>6</sup> In my work with Committees on Ministry, Members in Discernment, advisors and discernment teams at local churches, I teach an approach to the *Marks* that prioritizes the eight competency categories and asks how a candidate’s work demonstrates competency in those areas. The national setting offers six possible demonstrations for each competency category. This list of forty-eight is neither exhaustive nor exclusive but does provide guidance for categorizing artifacts; however, it should not be used as a checklist.

**Knowledge banking assessment** includes the more traditional tests and grades with teacher input and student memorization. This method, described by Paulo Freire, relies on the input of the instructor as “deposits” of information and the learner as one who stores that deposit

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<sup>5</sup> Richard A. Voorhees and Elizabeth A. Jones, *Defining and Assessing Learning: Exploring Competency-Based Initiatives* (Washington, DC: US Department of Education, 2002), 7.

<sup>6</sup> Ministerial Excellence, Support and Authorization Team (MESA), *Manual on Ministry*, (Cleveland: United Church of Christ, 2018), 10.

and gives it back to the instructor when requested.<sup>7</sup> This is often seen as rote memorization learning. Freire argued knowledge banking was not the best measure of learning even though it had longstanding prominence in the field of education.

More popular today is **objective based instruction and assessment** whereby the instructor outlines the learning objectives and assesses acquired knowledge through traditional testing methods. This method is instructor designed and led. An objective might be: The candidate will show knowledge and understanding of the Hebrew Scripture and New Testaments at 80% mastery. The assessment would measure accuracy through forced choice or open-ended questions. Objective based and knowledge banking teaching and testing are both similar to a checklist which committees appreciate. The *Marks* invite assessment of the candidate based on their application of knowledge through performative actions in the world. This application of knowledge moves from testing the knowledge itself into assessing the candidate's ability to use knowledge in a variety of settings. Assessors are looking at work products or case narratives to determine the candidates ability to engage scriptural knowledge in preaching, teaching and pastoral care settings, not only through testing or writing prompts.

A **rubric** is “a scoring guide used to evaluate the quality of students' constructed responses.”<sup>8</sup> Often this is numerical with 1 being low on the scale and moving up to 4 or 5. A rubric is important for assessment as it communicates, from the outset, the hoped-for learning or competency to be gained. In the case of this project, the rubric does not use numbers but levels of understanding moving from Experience to Deep Understanding to Integration and then Passion

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<sup>7</sup> Paulo Freire, *Pedagogy of the Oppressed*, (New York: Continuum, 2000), concept covered in Chapter 2 of this book.

<sup>8</sup> W. James Popham, "What's Wrong - and What's Right - with Rubrics," *Educational Leadership* 55, no. 2, (October 1997): 72.

as demonstrated in work related to each Mark.<sup>9</sup> For example, does the presented artifact, case study or reference letter demonstrate the candidate's Experience, Deep Understanding, Integration, or Passion in living out a given Mark?

Candidates for authorization in the UCC are members of local UCC churches who have been welcomed as **Members in Discernment** by a local Association. "A member of a local church who is approved by an Association's Committee on Ministry (COM) to enter a discernment relationship is called a Member in Discernment (MID)."<sup>10</sup> This is a season of formal preparation and formation for vocational, professional ministry. The MID relationship may take myriad forms including seminary coursework a la cart, a degree, something more piece-meal from multiple institutions or settings, regional education programs, or an apprenticeship. The MID journey can last anywhere from one to seven years.

A **preparation and formation plan** affirms competencies already demonstrated and suggests needed instruction and skill development for a given candidate based on assessment following the *Marks* eight main competencies. In the past, most candidates for authorization needed a Master of Divinity from an accredited seminary. However, with the new *Manual on Ministry* released in 2018, the UCC is fully embracing multiple paths to ordination and encouraging committees to assess all candidates, including seminarians, based on their competencies measured by the *Marks*. A preparation and formation plan should include opportunities for Members in Discernment to build knowledge and skills in areas highlights by the *Marks*. Theological education (through an accredited seminary, a recognized regional

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<sup>9</sup> Ministerial Excellence, Support and Authorization Team (MESA), "The Marks of Faithful and Effective Authorized Ministers of the United Church of Christ with a Rubric for Assessment," (Cleveland: United Church of Christ, 2014), 3.

<sup>10</sup> MESA, *Manual on Ministry*, 20.

theological education program, a mentoring program, or some combination of these) with outcomes oriented toward acquisition of competencies in the areas noted in the eight *Marks* is not the only piece of preparation and formation.<sup>11</sup> A seminary degree may be a recommendation for some candidates, while others have a more cafeteria style plan to fill in gaps among existing competencies.

**Committee on Ministry** (COM) members in the United Church of Christ are elected volunteers, both lay and ordained, who serve for three to six years. The primary resource that guides all their work, including assessment for authorization, is the *Manual on Ministry*. In the UCC, local Association Committees on Ministry hold the authority for candidate assessment and referral to the Association for ordination. Members in Discernment work with their committees to develop preparation and formation plans in line with the needs of the Church and the gifts and skills of the candidates.

The **Showcase Portfolio** design that I suggest invites the candidate to prepare case studies and other artifacts demonstrating their integration of the Marks in real-world ministry settings. The portfolio “serves as a means of articulating and evidencing the prior, often experiential learning of a skilled and knowledgeable adult. The portfolio becomes a record of a life of learning, providing a student with a perspective on both prior and future learning, and indeed, on him or herself.”<sup>12</sup> **Artifacts** are items that provide evidence of competency which may include verbatims from pastoral care visits, papers from classwork, confirmation class sessions, Bible study units, newsletter articles, blog (written) and vlog (video) posts, etc. Narrative case

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<sup>11</sup> MESA, *Manual on Ministry*, 28.

<sup>12</sup> Elena Michelson and Alan Mandell, *Portfolio Development and the Assessment of Prior Learning*, (Sterling, VA: Stylus Pub, 2004), 1.

studies as well as personal reflection on artifacts will follow an After-Action Report format which asks:

1. What was expected to happen?
2. What did happen?
3. What went well and why?
4. What can be improved and how?

In their reflections of artifacts, candidates are asked to self-identify the *Marks* they see demonstrated in the experience. This also offers space for the candidate to note a need for growth. The portfolio invites other observers to adopt the language of the *Marks* to include additional voices in the assessment process. These voices might include local church discernment committee members, the local church pastor, mentors, advisors, instructors, field education or CPE supervisors, work supervisors, etc. These additional voices should be given the *Marks*. They may or may not use these in their documentation for the assessment. If not, the committee will need to super-impose it as part of their assessment work. An **After-Action Report** (AAR) is “a professional discussion of an event, focused on performance standards” that “integrates learning and action.” It involves all parties in a “non-hierarchical environment” designed specifically for learning.<sup>13</sup> The AAR model is practical and coupled with theological reflection, I think it can help committees better assess candidates.

The UCC **Manual on Ministry** (MOM) is a resource provided by the national setting to Committees on Ministry to guide their work. The hope is that this document lives and offers standard best practices across the Church for the essential ministry work of the Committee on

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<sup>13</sup> Frances Hesselbein and Eric K. Shinseki, *Be Known Do: Leadership the Army Way*, (San Francisco: Josey-Bass, 2004), 136.

Ministry. Local Committees on Ministry have local autonomy in the application of these practices.

Some additional acronyms that will occur throughout the project include MESA and CARDD. Ministerial Excellence, Support, and Authorization (MESA) is the office and team at the national setting responsible for supporting the “implementation of denominational polity for authorized ministry, especially equipping the Committees on Ministry that determine authorization of those persons who hold or are pursuing ministerial standing.”<sup>14</sup> This office publishes the *Manual on Ministry* and supporting documents. CARDD is the UCC Center for Analytics, Research, Development, and Data with a mission to “gather and provide data and research for ministry transformation.”<sup>15</sup>

## Research Question

The United Church of Christ gives quite a bit of latitude to congregations and judicatories because its covenantal polity is based on congregational autonomy.<sup>16</sup> This polity results in a wide variety of policy and practice across the denomination, as revealed in two studies generated by the national setting of the UCC. The Rev. Holly MillerShank, the first team leader for the Ministerial Excellence, Support and Authorization Team (MESA) at the national setting, undertook a project early in her tenure to survey 173 Committees on Ministry across the denomination. Her report, released in 2015, concluded that “inconsistencies across settings are

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<sup>14</sup> “The Ministerial Excellence, Support & Authorization Team.” United Church of Christ, accessed December 21, 2021, <https://www.ucc.org/what-we-do/justice-local-church-ministries/local-church/mesa-ministerial-excellence-support-and-authorization/>.

<sup>15</sup> “About the Center for Analytics, Research & Development, and Data (CARDD).” United Church of Christ, accessed December 21, 2021, <https://www.ucc.org/what-we-do/office-of-the-general-minister-president/center-for-analytics-research-and-development-and-data-cardd/about-the-center-for-analytics-research-and-development-and-data-cardd/>. Development was added to this office after the publication of the reports referenced in this project.

<sup>16</sup> See glossary for UCC *Manual on Ministry*.



apparent,” even as there was also a desire for “increased consistency and excellence.”<sup>17</sup> In the same year, the Rev. Kristina Lizardy-Hajbi, PhD, former Director of the Center for Analytics, Research, Development and Data (CARDD), noted that the *Marks of Faithful and Effective Authorized Ministers* most related to congregational vitality were the pastoral skills least sought-after by congregations.<sup>18</sup>

The works of MillerShank and Lizardy-Hajbi informed and confirmed my lived experience working with Committees on Ministry and Members in Discernment. It all seemed a lot like my archery experience; however, in the case of leading a church competency in the classroom and in the demonstration of those skills in practice are equally important. Historically seminary diplomas have been interpreted by local association committees on ministry (COMs) as evidence that a candidate is prepared for ministry. Across the denomination, these local committees have varying degrees of engagement with their members in discernment (MIDs), but until the last few years, the seminary diploma has been the basic requirement for progressing toward ordination. However, real life cases have proven that seminary graduation does not ensure that candidates have the people skills or leadership sensibilities necessary to lead a congregation. This can result in short stays with congregations with emotional, spiritual and financial hardships for the minister and congregation.

My work up to this point with the COMs in Penn Central Conference confirmed the understanding that ministerial candidates have been and to some extent continue to be expected to attend the local seminary (Lancaster Theological Seminary) and therefore the *Marks* are not applicable since the Seminary education was assumed to be enough preparation for ministry. One

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<sup>17</sup> Holly MillerShank. Committee on Ministry Research Report: United Church of Christ, 2015.

<sup>18</sup> Kristina Lizardy-Hajbi, “Congregational Vitality and Ministerial Excellence: Intersections and Possibilities for Ministry,” (Cleveland: United Church of Christ, 2015), 30.

former COM Chair shared with me that when he left the COM in 2016 they had not used the *Marks* at all.<sup>19</sup> Committee members also felt overworked as volunteers and under-equipped to do the assessment work necessary for the *Marks* to be measured with each candidate.<sup>20</sup> In response to this reality, my proposal offers one bridge for crossing the gap between academic assessment for degree completion and competency assessment for practical and effective ministry. COMs and the judicatory staff who resource them are facing an adaptive problem with myriad attempts across the denomination to solve it. In light of the above, I offer the following problem statement:

*Presently, the UCC's methods of assessing candidate competency are varied and confusing. They are not functioning as well as they could. They are in need of some standardization of understanding and application, along with ways to prepare people for ministry in today's culture.*

There are a number of ways to address this issue. I bring a conviction that academics and practical skills (competencies) can be assessed using the *Marks of Faithful and Effective Authorized Ministry* in meaningful ways as indicators of preparedness and readiness for parish ministry. In order to investigate this issue, I offer the following research question for this study:

*Acknowledging resistance in recent history, how can the UCC embrace and implement competency-based assessment to evaluate preparedness for authorized ministry?*

This question undergirds my research and my work. In this project, I seek to address it in service of the church.

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<sup>19</sup> Email correspondence with the author, 11/18/21.

<sup>20</sup> This is a generalized statement based on years of staffing Committees on Ministry.

My question is an exercise in practical theology, and so I will use the work of Richard Osmer to guide this project. Osmer claims that the completion of four core tasks should guide the development of practical theology, and I will follow these tasks to answer my research question.

1. Describe is going on – This is the descriptive empirical task of gathering information and looking for patterns as we listen to others.
2. Discover why this this going on – This is the interpretive task that looks for standard ways to better understand and explain the patterns.
3. Think about what should be going on – This engages the normative task of, in Osmer's words, “using theological concepts to interpret” these patterns in ways that inform our responses.<sup>21</sup>
4. Design how we might respond - This is the pragmatic task of discerning strategies to address the situation and provide space for reflection with all parties.

The national setting of the UCC, through our Ministerial Excellence, Support, and Authorization (MESA) team, has brought together information to help with my task of describing what is going on. In describing the current state of the field, I weave reports from several national staffers together with practical judicatory realities and then present my own interpretations alongside some of their conclusions. The UCC’s new *Manual on Ministry* presents a strong theological argument for moving toward using the *Marks* with ministerial candidates and I bring in the setting aside of the Levites in Numbers chapter 8 to compare and contrast the ancient rituals and practices for setting aside priestly leadership with our preparation and formation rituals today. Chapter Three brings in the educational shift to competency-based

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<sup>21</sup> Richard Osmer, *Practical Theology: An Introduction*, (Grand Rapids: William B. Eerdmans Publishing Company, 2008), 4.

education and assessment as more K-12, secondary and post-secondary schools begin to explore and implement this practice. This gives a more worldly view of what should be going on educationally with adults. Chapter Four presents my design for a response from the denomination. It is a working model that considers the history that has brought us to this point in time, as well as the future church that calls us. This allows me to answer my research question and then provide proposed next steps in Chapter 5.

## **Type of Project**

This project employs mixed methods with constructive research around competency-based assessment and qualitative research on implementing competency-based assessment with the UCC's *Marks of Faithful and Effective Authorized Ministers*. I have applied the constructive research with the Assessment Team that brought together assessors from each of our eight associations in the Penn Central Conference of the United Church of Christ. The UCC has provided a tool for assessment and evaluation of candidates for ministry, but it has not been implemented as effectively as many had hoped it would be. I believe this research and application will provide a working example for other committees to use the tool of the *Marks* and to establish a set of artifacts for collection and assessment that will meet the ministry leadership needs of the Church today.

In completion of this project, I have:

- researched the use of competency-based assessment tools for their efficacy and practicality across fields (education, vocational training programs)
- designed a portfolio that can be comprehensive but not cumbersome, specifically for authorization candidates in the UCC (Appendix 3)

- recruited an assessment team of 10-12 volunteers (clergy and lay) willing to try this portfolio with new candidates for authorization in the UCC
- assessed portfolios at various stages of the authorization process, provided feedback and met regularly with candidates
- secured written release from team members and from candidates
- edited the original portfolio as use directed
- designed and tested a training session for Assessment Teams
- evaluated the research and outcomes to compile suggestions for further research areas and potential for broader application.

Essentially, this project has been a reflective case study in the application of competency-based assessment for ministerial candidates in the United Church of Christ. The project was undertaken in search of a working response to the new UCC *Manual on Ministry* and desire to implement widespread use of the *Marks of Faithful and Effective Authorized Ministers*. There will be some element of emergent design<sup>22</sup> as committee members and candidates have agreed that we may shift our baseline portfolio as we learn more and the team collects artifacts. Trends may emerge that invite reconsiderations. Candidates will not be held back in this process. All will remain on track with their local Committees on Ministry. The goal is for the development of a portfolio that asks for the best set of artifacts for assessment by the committee. The design includes updates to the portfolio as candidates respond to learning needs and participate in formative experiences. The creation of such a showcase portfolio project offers a re-orientation

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<sup>22</sup> Emergent Design invites the researcher to respond and adapt the project as the data leads. In this project, emergent design is present as the Assessment Team works to discern how the portfolio will work in implementation. One key development was adding candidate reflection to more artifacts than just the case studies as was originally planned.

for authorization in the UCC weighing the demonstrated competencies of a ministerial candidate more heavily than academic transcripts.

## **State of the Field**

Richard Osmer's first step is to describe the present reality and determine why this is true. The national setting of the UCC through the work of the Ministerial Excellence, Support and Authorization Team (MESA) as formerly led by Rev. Holly MillerShank did a lot of work to address Osmer's first two tasks of "what is" and "why is" this the reality for ministerial formation and assessment in the UCC. Subsequent chapters will turn to tasks three and four in Osmer's approach and offer a vision for what should be going on and one implementation plan. First, where things currently stand. As I read it, MillerShank's Committee on Ministry Report helped to give a snapshot of the landscape, sharing with the denomination "what" was going on at the time in 2014. The MESA Team had formed the Habakkuk Group with thirteen members from across the denomination to revise and re-vision our *Manual on Ministry* to include the 2005 *Ministry Issues Pronouncement* and 2009 *Implementation Document Draft 3.1*. An early task was to understand and interpret MillerShank's report. Their interpretive work excavated some of the "why" and used it to frame the "why" for the new Manual. The Hababkuk Group gathered and studied for several years to produce a new set of *Marks* as well as the denomination's new *Manual on Ministry*. Shared with the wider church in 2018, the re-imagined *Manual on Ministry* casts a vision for "what should be going on."

The new *Manual* codified some earlier resources that had been sporadically used by the wider church since the 2009 *Ministry Issues Implementation Draft 3.1* first introduced the *Marks of Faithful and Effective Authorized Ministers*. The *Draft 3.1* was an implementation document crafted in response to the Ministry Issues Pronouncement of General Synod 25 in 2005 in which

multiple paths toward ordination were affirmed by the denomination.<sup>23</sup> These *Marks* are meant to uphold the principal desire of the UCC to have a learned clergy while also expanding the definition of learnedness. This expansion of what it means to be learned has created a tension point among COMs and clergy in how to continue to assess candidates for authorized ministry. With this expansion of learnedness came the question, “If seminary is not the standard, what is?”

When originally shared in 2009, “*The Marks* were intended to be engaged and further refined to be a guide for ministerial candidates from the early moments of call through authorization, active ministry and into retirement.”<sup>24</sup> The hope was, and remains with the updated version, for the *Marks* to be used in a wide variety of ways along the whole of the vocational journey of authorized ministry. The *Marks* are not designed to be a completed checklist of demonstrable gifts, but rather a full representation of competencies necessary for authorized ministry. A candidate or already authorized clergy person may have great aptitude in some *Marks* while showing limited understanding or experience in another mark. This could help direct continuing education for authorized clergy as they live out their call.

In my work with twelve different Committees on Ministry across two conferences (Southern and Penn Central), as well as deep involvement with national staff training programs over the past 9 years of judicatory ministry, I have seen myriad engagements with the *Marks*. They have ranged from outright refusal to acknowledge their existence to active wrestling over how to use them for accurate, consistent assessment of candidates. This move from traditional assessment via a seminary transcript to a yet to be defined type of assessment being asked of the

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<sup>23</sup> In short, the United Church of Christ would no longer require a Master of Divinity from an Association of Theological Schools accredited seminary for ordination in the UCC. While already affirmed in some areas of the church, this has not been readily accepted or implemented across the whole of the denomination.

<sup>24</sup> Ministry Issues Implementation Committee, *Implementing the Pronouncement: “Ministry Issues: Forming and Preparing Pastoral Leaders for God’s Church,”* Draft 3.1, (Cleveland: United Church of Christ, 2009), 6.

local Committee on Ministry has caused a seismic shift among members of those committees in their understanding of the role of the Committee as it relates to the authorization process. One committee member described it as feeling like she went from a “check-list keeper and story listener to all the seminary professors rolled into one” person.<sup>25</sup>

Historically, many members of the Committees on Ministry might describe their primary function as a gatekeeper for ministry, responsible for checking a list of accomplishments for each candidate. This list generally included a Master of Divinity, a Clinical Pastoral Education experience, and field education in a local parish setting, along with annual interviews with the committee to share about learnings and growth. It was largely a passive role. Engaging the *Marks of Faithful and Effective Authorized Ministers* for assessing each candidate involves the members of the committee or a sub-committee in very active roles looking at numerous work products from each candidate.

This project presents the process followed in Penn Central to design a theologically and functionally appropriate response to the new *Manual on Ministry*. The research explores competency-based assessment and I offer it as a framework for committees to engage in line with the *Marks*. This project also tests this framework in a model for implementation using a showcase portfolio. The language in competency education and competency-based assessment is similar to some of the implementation strategies that have been offered in the past. The *Implementation Document Draft 3.1* that first introduced the *Marks* in 2009 presented a shift in language from “student in care” to “member in discernment” and called on COMs to “define an educational and formational plan tailored to the needs of the church as well as to the particular

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<sup>25</sup> This was from a conversation in 2012 at a COM meeting where I was explaining the hope of shifting their practices to incorporate the Marks more. I do not have in my notes who offered this assessment but wrote it down so as to remind myself to continually combat this errant understanding of the COM’s new role.



gifts, needs and circumstances of each Member in Discernment.”<sup>26</sup> This plan development by the committee was to be done in three stages of extensive initial assessment, followed by managed on-going assessment and then a final assessment for authorization. There were charts for correlating classwork to the *Marks* and resources for assessment that largely focused on this association of academic work to the *Marks*.<sup>27</sup> I believe a more explicit link to competency-based assessment provides a valid means of continuing the tradition and expectation of a learned clergy. The *Marks* gain new meaning when understood inside competency-based assessment and offer new language for helping to educate, equip and engage hesitant committee members in their use. Using the *Marks* in this way also invites deeper examination of the competencies a candidate has at the outset of the discernment journey.

With the 2018 release of the *Manual on Ministry* the need for more Committees on Ministry to engage in candidate assessment using the *Marks* was laid bare. This revision, the first since 1986, suggests an eventual end to three forms of authorized ministry – ordained, licensed and commissioned – moving to one authorization understood through ordination. This shift will take some time to be realized and there is resistance among associations across the denomination. The new *Manual* has moved the eight associations that I serve (as well as Committees on Ministry across the denomination which had previously resisted) to look more seriously at the *Marks* and alternative paths as viable avenues to move candidates toward ordained ministry. A seminary education has nearly always been the assumed path to ordination in this region due to the proximity of Lancaster Theological Seminary. In other parts of the

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<sup>26</sup> Ministries Issues Implementation Committee, *Draft 3.1*, 61.

<sup>27</sup> In the implementation document *Draft 3.1*, the section titled “Resources for Assessment of Persons” uses the introductory paragraphs to focus on Seminary, Educational Institutions, Instructors and Clinical Pastoral Education with only a brief mention of the growing Conference-based regional education programs.

country, this has not been the case. My own history in the Southern Conference of the United Church of Christ introduced me to multiple paths long before the UCC affirmed them in 2005.<sup>28</sup>

When I began to use the *Marks* in 2012, I assumed committee members had knowledge about how this type of assessment would work because of my teaching background and the first edition of the *Marks* bearing close resemblance to classroom objectives. However, the more I teach the *Marks* and their use to Committees and candidates, the more I have recognized how different this is from the instructor-driven education with which I am most familiar. Committees on Ministry are also unfamiliar with doing this type of authentic, broad assessment and the need for looking deeply at the whole person for consideration. A seminary transcript, field education and a few interviews in order to ascertain ministry readiness had been common practice in the past. Across the denomination, my colleagues express how their committees do not feel equipped to do this work of fuller candidate assessment.<sup>29</sup> Committees are comprised of both lay and authorized members of local UCC churches. Most of the authorized members were ordained under the previous iteration of the *Manual* and hold a master's degree in divinity (MDiv). Committees found the process of authorization relatively straight-forward since the MDiv degree assumed broad knowledge in ministry. Not being able to rely on the MDiv degree alone left committees with the complex task of discerning readiness for ministry without the degree as a

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<sup>28</sup> The Southern Conference Ordination Preparation Education (SCOPE) Program started in 1986 and existed for 14 years with 15 candidates eventually being ordained. The Pastoral Leadership Program (PLD) started in the Southern Conference in 2004 and graduated 24 ordination candidates in 10 years. Twenty of those graduates were ordained. Other conferences also offer regional training programs that began in response to the Ministry Issues Pronouncement of 2005: Southeastern Conference Pathways Program, New York Conference School of Ministry, Minnesota and Wisconsin Conferences combined Damascus Project, Penn Central, Southeast and Northeast joined to form Lay Ministry in the 21<sup>st</sup> Century.

<sup>29</sup> Conversations with my 9 Committees on Ministry reinforce this claim. One committee member said in an email how they “does not feel qualified at all” to do this work and a chair shared their feelings saying “I think we don’t feel equipped because of the lack of framework for assessment, trainings for mentors, and time with candidates.” Another committee member shared how they felt OK about it but acknowledged they were using their seminary experience to frame their comments. An ACM colleague shared he felt his committee knew the Marks well, but had no idea what to do with them.

measuring tool. For some members (particularly laity) this seemed complicated and assumed areas of expertise they did not possess. It is my hope that linking the educational practice of competency-based assessment with a process example will equip and invite more committees to embrace the *Marks* and live fully into their calls of discernment, authorization, nurture and accountability with Members in Discernment (MIDs).

The *Marks of Faithful and Effective Authorized Ministers* begins by defining the context for which it was written:

The Marks of Faithful and Effective Authorized Ministers affirm that the 21<sup>st</sup> century Church needs wise, knowledgeable, and ever curious ministers. Consistent with the 2005 Ministry Issues Pronouncement of General Synod, the Marks convey that such learnedness is shaped through diverse educational experiences, lessons of life's journeys, personal character, and the Spirit's inspiration.<sup>30</sup>

*The Marks* consist of eight competency categories with six possible examples for each category.

Using these *Marks* encourages candidates to do a high level of critical thinking, self-reflection, and viewing of prior learning through a new lens. The competency categories are:

- Δ Exhibiting a Spiritual Foundation and Ongoing Practice
- Δ Nurturing UCC Identity
- Δ Engaging in Sacred Stories and Traditions
- Δ Building Transformational Leadership Skills
- Δ Caring for All Creation
- Δ Participating in Theological Praxis
- Δ Working Together for Justice and Mercy
- Δ Strengthening Inter- and Intra- Personal Assets<sup>31</sup>

*The Marks* serve as a guide for assessing a candidate's knowledge and competence, as well as directing continued preparation and formation. *The Marks* engaged as competencies in the portfolio assessment described in Chapter 4 are about the ongoing configurations of the skills that will be needed for a beginning pastor to be effective. There is no assumption made that

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<sup>30</sup> MESA. *Manual on Ministry*, 10.

<sup>31</sup> MESA, *Manual on Ministry*, 11-14.

demonstration of experience or even mastery in a single area means that the candidate is proficient across multiple categories. To reiterate, the *Marks* are not a checklist and may combine in a variety of ways in each candidate that comes before a committee. Furthermore, this type of assessment and the *Marks* can frame continuing education for MIDs and authorized clergy for lifelong learning.

Because of the historic reliance on the seminary to do the education and assessment work with candidates, Committees on Ministry need more guidance and explicit instructions for how to do assessment of Members in Discernment that will help the committees name needed education or instruction for the candidate. My years in education gave me the foundation to make some of the cross-disciplinary leaps that are not necessarily intuitive to others in this process. My hope is that some of the research here will build the connection between ecclesial and education practices so that Committees on Ministry members might navigate this work with intentionality.

As I worked to build my understanding of implementing programs for competency-based assessment, a report from The National Postsecondary Education Cooperative (NPEC) became instrumental in developing the practice in Penn Central. Their 2002 report offers twelve principles of strong practice in their report “Defining and Assessing Learning: Exploring Competency-Based Initiatives.” Their project aimed to “produce a final report that could serve as a hands-on resource for practitioners who seek to develop, implement or refine their competency-based initiative.”<sup>32</sup> To that end, their twelve principles (found in Appendix 1) were instructive in helping me design an implementation strategy using the *Marks* as the standard competencies and a simple rubric for the assessment of Members in Discernment.

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<sup>32</sup> Voorhees and Jones, “Defining and Assessing Learning,” 13.

One obstacle I had to confront in this project was translating from education language and paradigms to ecclesial language. The twelve principles from NPEC were written for educators, educational administrators, and institutions. I offer the following condensed five points in more “church” and “committee on ministry” friendly language, for crafting a strong competency-based assessment program in their associations. As more associations implement competency-based assessment using the *Marks*, the academic and practical skills encompassed in the *Marks* will become more uniformly recognized as indicators of preparedness and readiness for ministry. I will go into more detail and explain how these principles guided the committee education and assessment team implementation work in the Penn Central Conference in Chapter 3.

1. **Large scale acceptance of the competencies**<sup>33</sup> named in the *Marks of Faithful and Effective Authorized Ministers* as those needed for ministry. Across the denomination, this acceptance has been elusive, however, it is imperative for building an assessment program that relies on these *Marks* as the areas of competence.
2. **General understanding of what is meant by competency assessment and willingness to enter the process of assessment** of these competencies over time. This assessment will be across multiple pieces of work, called artifacts, in a showcase portfolio. Artifacts should be routinely assessed over the course of the Member in Discernment (MID) experience and used to inform the development, ongoing implementation, and possible realignment of the individualized preparation and formation plan developed for each MID in an Association’s care.

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<sup>33</sup> When I cover these in more detail in Chapter 3, I will offer the correlation to the Cooperative’s original 12. These twelve are also included in Appendix 1.

3. **Formal Training** for those doing the assessment work, whether the assessment is done by a sub-committee, the full committee on ministry or an assessment team as will be presented in this example, specific training on how to do assessment using the *Marks* is essential.
4. **Recognition that all assessment is of demonstrated competency** and tied to learning goals with results linked to competency growth in specific *Marks*. Demonstrated competency may not be in formal, written papers. Competency may be demonstrated in myriad ways including case studies, reflections, art work, testimonies of others, curriculum development, sermons, and even papers from formal coursework.
5. **Uniform reporting** to all stakeholders is shared when adequate competency across the *Marks* is reached.

As I noted, there were 12 principles when the National Postsecondary Education Cooperative did their study. I proposed these five and worked through them in our collective approach to Osmer's third and fourth tasks of practical theology: looking deeply at what committees are being asked to assess through a theological lens and developing a new approach to the work of ministerial candidate assessment based on both history and present culture, and fully engaging the UCC *Marks*. Before I offer the development of these principles in chapter 3, a review of the marriage of assessment and education over time will return to Osmer's first tasks of what and why from the educational side of this question. First, I will highlight the significance of this work for both the UCC and the wider church, and offer a literature review in Chapter 2. Chapter 3 will look closely at this history and examine the ways in which education and assessment have shaped the work of UCC Committees on Ministry. Chapter 4 will turn to Osmer's fourth task and describe how Penn Central Conference implemented a portfolio assessment for ministerial

competency using the *Marks*, in response to Osmer's early tasks of examination of how we have historically approached this work, and now respond to changes in ministry, culture, and education. Finally, I will offer conclusions in Chapter 5 based on that application for how others might continue this work or apply it in their settings.

## Chapter 2 Significance and Literature Review

Significance

Most Helpful Reads

Literature Review

Important Considerations

### Significance

As the significance of this project is spelled out, the transition into discovering what is going and applying a theological lens for the work begins in earnest. Osmer's initial tasks were addressed in the state of the field. Looking at the significance moves into tasks three and four in core tasks of practical theology. The United Church of Christ values a learned clergy and Association Committees on Ministry have historically relied on seminaries to provide the primary learning opportunity and environment. The shift to a different model of assessment for ministerial candidates requires new learning for committees as well as a more expansive understanding of learnedness across the church. Because the *Marks* have had a varied and rocky reception, many Committees on Ministry across the church are just beginning to engage the *Marks* for assessment. Few committees have a tested method for assessment beyond the ways they have historically assessed via a review of seminary transcripts and supplementing documents. This project tested a competency-based assessment model as methodology for engaging the *Marks* with all candidates for authorized ministry.

While there is some fear that full engagement of the *Marks* will result in the end of seminaries as a place of higher theological learning, I believe an embrace of the *Marks* and competency assessment opens a door for seminaries to provide for the learning needs of a changing church body and a new generation of its leaders. The NPEC analysis and subsequent principles noted in Chapter 1 speaks directly to these settings and Eden Seminary has aligned



educational outcomes with the UCC *Marks*.<sup>34</sup> In the model I am testing, a portfolio review committee provides regular feedback on artifacts and direction for continued learning specific to each candidate, seminarians and those on other paths, based on their existing competencies and skills as measured by the *Marks*. It is possible that one outcome of this study will be a recommendation that an agile seminary could adapt and respond to meet the learning needs of a new population of students as trends and themes develop. In fact, Kairos University has just launched and claims to be “one of the largest and most diverse accredited systems of competency-based theological education in the world.”<sup>35</sup> The Pennsylvania Academy of Ministry courses at Lancaster Theological Seminary, while not competency-based, does offer courses for specific educational needs of ministers not enrolling in degree programs.

In brief, a portfolio would consist of multiple submissions over the course of the Member in Discernment journey. Initially, candidates would submit applicable transcripts, letters of reference, case studies or curriculum lessons and add their personal reflections on *Marks* exhibited. This first set of documents would allow the assessment team to draft a starting place for which competencies are present and at what level. This information would be used to offer recommendations for learning needs specific to that candidate. The next submission would include artifacts to address the areas of growth noted in the previous recommendations. Possible artifacts along the way may include but are not limited to: final papers from coursework, worship services with sermon evaluations, pastoral care visits with reflection, Bible study plans, confirmation sessions, psychological evaluation, workshops developed, videos, or original

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<sup>34</sup> Former Eden President Dr. David Greenhaw (retired 2020) shared in a panel presentation with me and others at the UCC Authorizing Ministry for the 21<sup>st</sup> Century Conference in December of 2018 how Eden Theological Seminary was working to align course objectives with the *Marks of Faithful and Effective Authorized Ministers* to help more in the denomination become more familiar with the *Marks*.

<sup>35</sup> Kairos University, “Our Story,” Kairos University, December 7, 2021, <https://kairos.edu/about/our-history/>.

hymns. Artifacts submitted for assessment will always include the candidate's reflection on *Marks* exhibited. UCC seminaries could assist their UCC students by naming *Marks* in their course objectives or keeping the *Marks* in mind in new course development. The capstone to the portfolio is the candidate's ordination paper that details their personal theology for the association at large to consider at an Ecclesiastical Council.<sup>36</sup>

As a former high school social studies teacher in the late 1990s, I am versed in knowledge banking and objective based teaching and assessment methods<sup>37</sup> that focus largely on the skills and abilities of the teacher to successfully convey information for student learning. Studies by both the Center for Analytics, Research and Data (CARD)<sup>38</sup> and the Ministerial Excellence, Support and Authorization (MESA)<sup>39</sup> offices of the United Church of Christ note that our traditional methods of assessment for candidates have begun to fail the local church through the ordination of candidates who are not equipped to lead the church for today's challenges. "Decades ago, pastors may have been able to effectively lead their congregations solely with the ministry-related education and training they received; that is no longer a viable option for birthing the kind of life-altering, missional, adaptive ministry we long for in the 21st century,"<sup>40</sup> wrote Lizardy-Hajbi in her report on Congregational Vitality and Ministerial Excellence in 2015.

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<sup>36</sup> This capstone of a formal academic writing has demonstrated itself to be a stumbling block for multiple alternative track candidates that are otherwise assessed as ready. I believe full implementation of competency-based assessment using the Marks will necessitate a revisioning of the purpose and presentation of the ordination paper as it has been used for some time. I note the need for more work on this in my conclusions.

<sup>37</sup> See Central Terms for fuller explanation

<sup>38</sup> Kristina Lizardy-Hajbi, "Congregational Vitality and Ministerial Excellence."

<sup>39</sup> Holly MillerShank, "Committee on Ministry Research Report."

<sup>40</sup> Lizardy-Hajbi, "Congregational Vitality and Ministerial Excellence," 5.

Drawing on that report and the connection Lizardy-Hajbi draws to demonstration of the *Marks*, as well as my personal experience working with UCC Committees on Ministry, I am convinced more nimble leaders are needed in this era of God's church. As an example of this turning toward building nimble leaders, consider 2020. Even as a global pandemic continued to force pastors to regularly reassess their ways of gathering and ministering, I observed some clergy refusing to change with the moment. Some simply locked the doors and waited for a return to the ways of old. More agile pastors, especially in rural areas where internet access was not readily available or in congregations where resources were limited or members' age made the easy technological answers inaccessible, clergy mailed out weekly bulletins and sermon manuscripts or devotions for their members. Some pastors worked through their directories and sent out hand-written notes to each member of their congregation. There were also clergy who jumped into online gatherings, communities, and ministries as mediated by social media technology. In some areas, conference call worship became the norm. Many clergy believe that some sort of hybrid (in-person and online) worship will be necessary for the church moving forward. These examples speak to competencies in the categories of "Engaging Sacred Stories and Traditions," "Participating in Theological Praxis," and "Strengthening Inter- and Intra-Personal Assets" by showcasing engagement across generations, dealing with this collective trauma in theological frameworks, as well as adapting to preaching and teaching with, or in some cases without, technology in effective ways.

Teaching COMs language for competency-based assessment may be a bridge to help the wider UCC embrace the *Marks* and the example I share is a path toward assessing new leadership that is equipped to guide churches today. Even as other conferences begin portfolio assessment, I think giving competency-based assessment language to those doing this type of

work is of vital importance to help committee members feel equipped to do this specialized assessment in new and creative ways for ministerial candidates. It also can build a framework for validity and trust from the denomination and possibly across the wider church. I am aware the New Hampshire Conference, and more recently the Wisconsin Conference, have seated a unified, conference-wide committee for portfolio assessment and Eden Seminary is piloting a Marks Assessment Snapshot Portfolio in a partnership with the MESA team at the national setting.

### **Most Helpful Reads**

As I did this work of research and building a model in Penn Central Conference, I relied on some resources more than others. I offer first a “Most Helpful Reads” list for judicatory staff and committee on ministry groups considering implementing a competency-based assessment program.

1. *The Marks of Faithful and Effective Authorized Ministers of the United Church of Christ* are found in the UCC’s *Manual on Ministry* beginning on page 10. These are the competencies the national setting, with input from a variety of settings, has defined for authorized ministry in and on behalf of the United Church of Christ. The eight competency categories must be integrated into every aspect of the assessment plan.
2. *Defining and Assessing Learning: Exploring Competency-Based Initiatives* from the National Postsecondary Education Cooperative is a report I carried around with me for months. Their twelve principles and eight case study abstracts

inspired my five principles and guided much of my development work. Every word is worth the time.

3. *Understanding by Design* by Grant P. Wiggins and Jay MacTighe really helps assessors to define the levels of knowledge and understanding when assessing artifacts. I consider this another of my essential tools when preparing to talk about assessment of another person's competency. This book is the basis for my teaching in the use of a rubric alongside the competencies of the *Marks*.

## **Literature Review**

Kristina Lizardy-Hajbi's *UCC Congregational Vitality and Ministerial Excellence Report* from 2015 has guided understanding of the *Marks* for me and gives examples of the ways these competencies might be engaged by church leaders. She led research on behalf of the national setting to identify which of the *Marks* were the most apparent in the pastors of our denomination's vital congregations. Lizardy-Hajbi frames the *Marks* as important skills for pastors, noting of course that some skills are more important than others. This report can help discount the 'Marks as checklist' approach that many committee members share.

The *UCC Manual on Ministry* (1986 & 2018) and Holly MillerShank's *Committee on Ministry Research Project* (2015) are important tools for Committees on Ministry. The current Manual guides almost every aspect of the committee's work. MillerShank's report provides insight for the most recent revisions in this Manual. My own revisiting of these in totality gave a greater depth of understanding in the ways Committees on Ministry work across the denomination and what these committees feel they need to meet the newer demands of the recent revisions in the *Manual on Ministry*. With the shift from a focus on educational preparation and credentialing to demonstrable gifts and competencies, the next logical step is inviting committees

to understand their work as competency-based assessment and how that work fits into the larger scene of the changing landscape in education.

“It is very challenging to create, plan and implement competency-based systems” according to the 2002 report of the *National Postsecondary Educational Cooperative* as they shared results from eight case studies of competency-based initiatives in post-secondary institutions with the majority still in their early phases. This quote became mantra as I worked these last two years on doing exactly this in Penn Central Conference. In this report, the authors define competencies, discuss the importance of the “standardization of terminology and semantics that can lead to the transportability of competencies,”<sup>41</sup> and set a roadmap for using competencies in building a bridge from class credit hours to actual learning. These steps offer a way forward for committees that feel stuck in using the *Marks*. Their first component of a competency-based initiative is a description of the competency. The UCC *Marks* offered in the *Manual on Ministry* is the decisive list. This report calls for a standardized and embraced means of measuring or assessing the competency.<sup>42</sup> There is a standard rubric available from the national setting, but it is not widely known.<sup>43</sup> The report also prioritizes a standard by which someone is judged to be competent. Without a seminary transcript, committees don’t have confidence in their ability to measure candidate competencies.

The working paper from the Ministry Issues Implementation Committee, often referred to as *Draft 3.1* has also had influence on me over the years as it introduced the initial set of 64 *Marks* and the idea of a portfolio for Members in Discernment. MillerShank noted in 2015 how “the introduction of the *Marks of Faithful and Effective Authorized Ministers* put the United

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<sup>41</sup> Voorhees and Jones, “Defining and Assessing Learning,” 12.

<sup>42</sup> Voorhees and Jones, “Defining and Assessing Learning,” 26.

<sup>43</sup> A page from this rubric is in Appendix 6.

Church of Christ at the forefront of the move from input-based models of theological formation to outcome or competency-based models.”<sup>44</sup> A combination of denominational documents informed by my experience in judicatory ministry affirm for me a need for competent, nimble leaders for today’s church and a more standardized process for candidates even while the educational components, preparation and formation of each candidate remains highly individualized.

Heifetz and Linsky’s work on *Adaptive Leadership* and Tod Bolsinger’s book *Canoeing the Mountains* have been early influencers in the direction of this project. Many of the *Marks* point toward the difficult to measure leadership traits that combine with easier to measure theological and systematic knowledge. These books consistently point toward the needed adaptability of good leaders as well as competency in the field they lead. The adaptive change necessary for the UCC to move from transcript assessment to competency-based assessment is the bridge for which I am offering a model.

Former Southern Conference colleague Isaac McDonald writes in *Multiple Paths to Ministry: New Models for Theological Education* about the Southern Conference SCOPE (Southern Conference Ordination Preparation Education) program that was started in the 1980s. McDonald shares how the history of exclusion from education and ordination meant that many black men and women stood in need of alternative paths to ordination. The program that he outlines looks at four aspects of preparation and acknowledges that each candidate may work through these differently: (1) experience in the work of the church; (2) experience and training in secular areas of employment; (3) academic training; and (4) personal faith experience within the

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<sup>44</sup> Lizardy-Hajbi, “Congregational Vitality and Ministerial Excellence,” 52.

church. These aspects combine in myriad ways to move the candidate toward ordination.<sup>45</sup>

SCOPE was building portfolios and assessing competencies before that language was common and long before it would be affirmed by the wider church because of a demonstrated need in a specific community of the UCC. We have much to learn from our African American siblings in this type of preparation and assessment. How much more might the SCOPE model teach us for ministerial candidates not attending seminary?

Glenn Miller, in his essay in *Multiple Paths to Ministry*, asks “Why the seminary?” While there is a long history of the church’s dependency on this institution and the prestige that it enjoys, Miller wonders if the shifts in education and the church are forcing us to ask this question with less than a positive mindset. Seminaries are an important piece of the preparation puzzle; however, so many second and third career ministerial candidates cannot afford (financially or otherwise) 3-4 years of in-residence education. Seminaries may need to think about more online offerings and cafeteria style course registration. Some are moving to this type of model while others resist. This shift would push their accrediting bodies as well. Many ministerial candidates are asking this very question, why the seminary, of their committees. How does seminary teach the competencies named in the *Marks*? The pandemic saw the hashtag ‘#thingsididntlearninseminary’ routinely among the posts on my timeline. The regional theological training program in Southeast Conference, PATHWAYS, undergirds all their offerings with the *Marks* as learning objectives so that students and committees, as well as instructors, know exactly what the expected competency growth is. “PATHWAYS curriculum is competency-based and the courses are each aligned with *The UCC Marks of Faithful and*

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<sup>45</sup> Glenn Miller, “Why the Seminary?,” in *Multiple Paths to Ministry: New Models for Theological Education*, eds. Lance R. Barker and B. Edmon Martin (Cleveland: The Pilgrim Press, 2004), 63.



*Effective Authorized Ministers.*”<sup>46</sup> This would be one way for seminaries, especially those affiliated with the United Church of Christ, to answer Miller’s question and offer direction to the assessment work of committees using the *Marks*.

The grant team I served on at Lancaster Theological Seminary, formed in 2017, studied the possibilities and ramifications of the seminary absorbing the regional theological training program known as the Pennsylvania Academy of Ministry (PAM) and discussed the importance of the *Marks* in framing their course offerings. PAM was the second iteration of the tri-Penn Conference Lay Ministry in the 21<sup>st</sup> Century Program that was a member of the UCC Regional Theological Training Programs.<sup>47</sup> PAM was designed to train lay members for licensed ministry in the UCC with a 5-year program of Saturday courses. These courses were part of a full program but also available as needed by any particular candidate. One did not have to enroll in the full program to take a course. This cafeteria style is important for individualized education plans of preparation and formation that are designed from portfolio assessment. The lack of “pick and choose,” top-quality courses is a limitation for committees who want to help candidates get education to fill in gaps. It was an issue for the SCOPE program in the 1980s and remains an issue for the wider church still today.

A chief influencer in developing this process for me is the US Army’s *Be-Know-Do* approach to leadership and their use of the After-Action Report. The dispersed leadership model seems like a good analogy to church leadership as well as the ways the Army assesses the actions of leaders. The Army has a set pool of people from which to draw out leaders. The church is in a

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<sup>46</sup> “Ministry Preparation,” PATHWAYS: Theological Education for a Changing World, accessed June 19, 2020, <https://www.pathwaystheological.org/ministry-preparation-courses/>.

<sup>47</sup> The Tri-Penn conferences consist of Penn Northeast Conference, Pennsylvania Southeast Conference and Penn Central Conferences of the United Church of Christ. Across the denomination conferences and groups of conferences have established these types of training programs.

similar position. Neither can pull a person off the street corner because of demonstrated potential for leadership, both must rely on people already connected to their mission. Paul Schmitz summarizes the Army's Be Know Do principle in his book *Everyone Leads*, "Be: the character of a leader; Know: the competence of a leader; and Do: character and competence underlie everything a leader does."<sup>48</sup> The US Army and Public Allies (Schmidt's organization) believe in necessary competencies based on the field or mission to which a leader is called. They use competency-based assessments determined by the mission. Blending the Army's practice and the *Marks* is an applicable way for Committees on Ministry to approach their new call of deeper and fuller assessment of their candidates for authorization. The After-Action Report (AAR) model of the US Army as discussed in this book has potential to reframe the ways committees approach a candidate's preparation of artifacts and case studies for the portfolio. This AAR model was instrumental in the addition of candidate reflection on each artifact in their portfolio.

I was an educator in the day of objective based pedagogy and assessment and many members of committees on ministry remember more of a knowledge banking approach for teaching and learning. This makes it very challenging for committees to think about assessment of candidates without the traditional inputs of transcripts. My assessment skills predate the competency-based models in public education. *Portfolio Development and the Assessment of Prior Learning* offers twelve case studies in the use of portfolios in higher education as a means of giving academic credit to adult learners that have not been in the classroom setting for their learning. This book covers some of the concerns expressed by the UCC in their affirmation of multiple paths to ordination and in the crafting of the *Marks*. There are studies that investigate the economic and cultural injustices of higher education as well as social equity issues for

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<sup>48</sup> Paul Schmitz, *Everyone Leads: Building Leadership from the Community Up* (San Francisco: Jossey-Bass, 2012), 81.

women and minorities. “Prior Learning Assessment is non-elitist in a particularly American way, reflecting the belief that there are many ways of creating knowledge and countless sites at which academically credible knowledge is created.”<sup>49</sup>

Years ago, *Draft 3.1* from the Ministry Issues Implementation Committee was used to develop a portfolio for my candidates and committees in the Southern Conference to use and has been updated almost yearly as information from the national church is released. Committees (mine and those across the church) struggle with what artifacts to request and how to assess the artifacts received. One of the outcomes of this project has been a method for teaching committees competency-based assessment practices using our showcase portfolio and the *Marks* as the competencies being assessed. *A Hand-Book for Personalized Competency-Based Education* is pushing me to think about the Experience to Passion rubric from the national setting in terms of a proficiency scale for more standardized interpretations of prior learning. This book is designed for K-12 educators and geared toward classroom settings, but measuring learned content and skills is still the goal. Chapter 4 “How will Teachers Measure Student Proficiency” is a deep dive into blending content assessment with cognitive and metacognitive assessment into a combined score for grade level competency.

Regarding rubrics, James Popham writes in *Educational Leadership*, “Measurement specialists who scored students’ written compositions began to use the term [rubric] to describe the rules that guided their scoring.”<sup>50</sup> Perhaps the term ‘scoring guide’ would have been easier to understand, but rubric – a derivation of Latin for red and the marking of Christian monks at the beginning of chapters – was “decisively more opaque” and therefore made more sense.<sup>51</sup> The

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<sup>49</sup> Michelson and Mandell, *Portfolio Development and the Assessment of Prior Learning*, 10.

<sup>50</sup> W. James Popham, “What’s Wrong – and What’s Right – with Rubrics,” *Educational Leadership*, 55, no. 2 (October 1, 1997), <https://www.ascd.org/el/articles/whats-wrong-and-whats-right-with-rubrics>.

<sup>51</sup> Popham, “What’s Wrong.”

*Marks* meet several of the qualifiers for a flawed rubric that Popham outlines like being both general in evaluative criteria and yet offering some level of dysfunctional detail across the 48 Marks. Ultimately, Popham writes that “rubrics represent instructional illuminators.”<sup>52</sup> And that is the hope for how this proposed method will engage the *Marks*. As Popham suggests, students and teachers can reach mastery if rubric both measure what is known and what is not yet known. In education, this invites remediation or re-teaching. As used with a portfolio, the *Marks* as can identify areas of existing or achieved competency/mastery, as well as areas needing additional preparation and formation. This was helpful for me and my team in continually naming the *Marks* as competencies and varying levels of understanding as rubric. This approach coupled with the candidates’ reflections on their artifacts indeed made the *Marks* “instructional illuminators.”

*Understanding by Design* was also instrumental in this shift in thinking. This book discusses the differences between understanding and knowledge and asks how we know what needs understanding. It also describes the principles of designing authentic, performance-based assessments specifically for adult learners. This will help in understanding and articulating some of the ‘whys’ and ‘what fors’ behind the *Marks* as well as make the leap from many of the K-12 and postsecondary works to the adult learners to whom all my work applies.

Personal bias in favor of portfolios as a tool for assessing knowledge and skills exists in the education world and in my mind. In reading *To Portfolio or Not to Portfolio*, Judy Lombardi names the requirement of teacher portfolios as the main reason she is resigning her faculty position. She traces the history of portfolios and names dangers and benefits of this use in

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<sup>52</sup> Popham, “What’s Wrong.”

assessment of teaching candidates. Ultimately, she notes, “despite the price of progress, portfolios are here to stay.”<sup>53</sup> Lombardi pushes the questions of how valuable portfolios really are given the time necessary to compile them as well as who owns the artifacts submitted. These are questions this study as well as committees will need to address. In the course of our work, we determined that work products belong to the candidate. The feedback becomes part of their ministerial file which is the property of the United Church of Christ and stored by the association that holds the MID status or ministerial standing once granted.

Elizabeth Staehler in *Portfolio Assessment* highlights Alverno College. They offer a summer conference each year on Teaching for Competencies Using Performance Assessment. She outlines a strong case for portfolio assessors to have special training for their work. This was taken seriously in the implementation here in Penn Central. She also expands the discussion on who owns and has access to portfolios while in process and once completed. She also outlines the strengths and weaknesses in the portfolio system used at her school. Noting the strengths and weaknesses of other programs informs the development of training for committee as well as crafting questions for the portfolio review committee and for their assessment of candidate artifacts.

Literature around competency-based assessment, portfolios, and rubrics is vast as the education world has moved in this competency direction over the past twenty years or so. This reading informed the implementation of a working model for Penn Central Conference as we wrestled with using the *Marks* for ministerial assessment. These books and others noted in the

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<sup>53</sup> Judy Lombardi, “To Portfolio or Not to Portfolio: Helpful or Hyped?,” *College Teaching* 56, no. 1 (Winter 2008): 7-10.

annotated bibliography below also help to frame the assessment work that I taught my team how to do.

## **Annotated Bibliography**

These books listed here offered supporting information and often drilled down some of the specifics in the educational practices. It was helpful reading for me as I worked to develop training resources for the assessment team.

Andrade, Heidi Goodrich. "Using Rubrics to Promote Thinking and Learning." *Educational Leadership* 57, no. 5 (February 2000):13-18.

"Instructional rubrics make expectations clear" and "provide students with more informative feedback about their strengths and areas in need of improvement." Andrade outlines a clear argument for why rubrics are a great tool for learners. She addresses teachers concern that things change in education everyday so why should they learn this method and it makes me wonder if part of committees' lack of engagement is simply trying to wait out this change that they don't like for something better to come along. Andrade also has a section on making a rubric. While the Marks are constructed for committees already, her section discusses scale and crafting feedback for further learning. This is the goal of the Portfolio Review Team.

Berrett, Dan. "College, On Your Own." *Chronicle of Higher Education*, 60 no. 41 (July 18, 2014).

"Mastering a competency," he said in an interview "is like acing a driving test. Becoming a driver and passing a driver's test are quite different." This article really focuses on the pushback that colleges are receiving regarding the shift to competency-based assessments and shares personal stories from both teachers and learners. It also looks specifically at adult learners,

“I’m a different student than I was at 18. A more mature student is able to retain and conceptualize information differently.” How does this critique as well as maturity factor into the assessment process with the Marks?

Carnevale, Dan. “New Assessment Offers Accountability, Says President of Western Governors U.” *Chronicle of Higher Education* 53, no. 13(November 17, 2006) 38-40.

In this interview, Robert W. Mendenhall, president of Western Governors University discussed his institution’s shift to competency assessments. He discussed how competencies are measured and how that system can achieve greater accountability from the education sector. Carnevale’s opening question, “I’m used to hearing ‘competency assessments’ in terms of vocational training. How does that concept translate to a more academic setting?” seems directly related as the Marks are for ministers training toward their vocation in professional ministry. Surely there are more ways that vocational trade training might intersect with ministerial training for one’s vocation.

Chappuis, Jan and Richard J. Stiggins. *An Introduction to Student-Involved Assessment for Learning*, 7<sup>th</sup> Ed. New York: Pearson, 2017.

One of the goals of this text is for instructors to better select assessment methods for student learning targets as well as accurately measure student learning. It also notes the important role of the learner in crafting the assessments. Chapter 7 focuses on Performance Based Standards and applies directly to the Marks and the portfolio strategy for assessment.

Earl, Lorna M. *Assessment as Learning: Using Classroom Assessment to Maximize Student Learning*, 2<sup>nd</sup> Ed. Thousand Oaks, CA: Corwin Press, 2013.

In discussing this project with some educators at the University of North Carolina at Charlotte, they suggested this text because the portfolio review process outlined in my project is

engaging the candidate's personal reflection as a tool for their learning and growth as much as the feedback from the Review Committee. Earl gives an in-depth look at the nature of learning and ways that assessment itself can be designed to be formative for the learner. This will help discern artifacts for collection as well as ways of asking candidates to process and present their narrative.

Freire, Paulo. *Pedagogy of the Oppressed*. New York: Bloomsbury Academic, 2018.

In this book, Freire posits that oppressed people should turn away from the knowledge banking model of education and argues for a problem-posing model that invites students to analyze existing problems and question circumstances. He felt dialogue was better for learning than the traditional depositing of knowledge. The move to competency-based education broadly addresses Freire's concerns. Committees have long relied on the knowledge banking model assuming that completion of seminary made a candidate ready for ministry in the local church.

Gladwell, Malcolm. "Most Likely to Succeed." *The New Yorker*. Accessed May 21, 2020.  
<https://www.newyorker.com/magazine/2008/12/15/most-likely-to-succeed-malcolm-gladwell>.

Gladwell asks the important question, "How do we hire when we can't tell who's right for the job?" He compares assessing college quarterbacks' likelihood of success in professional football to teacher candidate success in the classroom. In both he discusses the intangibles that are observable but not always available as narrative and certainly not easily measurable. As the *Marks* are demonstrable gifts, there are many parallels here. Gladwell's point is well taken and as a sports fan I will use them often in explaining the *Marks* to committees.

Johnson, Robert L., James A Penny and Belita Gordon. *Assessing Performance: Designing, Scoring, and Validating Performance Tasks*. New York: The Guilford Press, 2009.



This book promises fuller insight on how to do the actual assessment of artifacts that are included in candidate portfolios. It also touches on some of the critiques and biases in performance assessments. This will be a valuable voice as the assessment team determines what work products, real life performance tasks, are needed to assess a Member in Discernment's competency in given areas.

Kotter, John P. *Leading Change*. Brighton, MA: Harvard Business Review Press, 2012.

Realizing that change is no longer the exception but has become the rule is important learning for leaders, pastors, in the 21<sup>st</sup> century. Kotter's eight steps for managing change can be used with committees as they engage this substantive change in their engagement with candidates. It may also help with addressing some of the intangibles that are being measured by the Marks.

Peterman, Francine. *Designing Performance Assessment Systems for Urban Teacher Preparation*. Mahwah, N.J.: Routledge, 2005.

Peterman writes about the practicality ethic 'keep on doing what seems to work' as it relates to teaching in the urban classroom and how that must be abandoned, even though the alternative will be more challenging, in order to better educate and measure learning in urban students. This parallels the shift in theological preparation and formation for ministerial candidates and her discussion on the development of different pedagogy and assessment will inform the argument here.

Townsley, Matt. "What is SBG?" YouTube Video, 4:29, November 8, 2011, <https://www.youtube.com/watch?v=k3dyJAKYsew>

I can't believe I'm citing a YouTube video, but this one was a needed shot in the arm for my understanding. This short video will be shown at our next Portfolio Review Committee meeting. It very clearly shows how our work with competencies (standards) will help candidates better determine their needs for greater understanding in certain Marks. It really makes me want to include a short video like this that explains how committees use the Marks. So much of the work of these types of committees is text heavy, I wonder if this would meet a committee learning need.

## **Important Considerations**

Osmer's first and second tasks in practical theology point practitioners to describe what is going on and to discover why that is the reality. This extensive research in the field of education, including theological education, helped paint the contrasting realities of dynamic and constant change in education, while the requirement of a seminary degree, and the accompanying preparation and formation of ministerial candidates, changed little over great spans of time. Change in the church seems often behind that of the wider culture. Competency-based education and assessment have proven histories in the field at this point and more school systems and higher education institutions are exploring growth in this direction. It is right that the church follow. The *Marks* give Committees on Ministry, and seminaries, in the United Church of Christ a way to do just that.

## Chapter 3

### **Brief History of Education Theological Education through Time Five Principles for COM Assessment Programs**

*“There is no such thing as genuine knowledge and fruitful understanding except as the offspring of doing.”*<sup>54</sup>

*John Dewey*

The literature for competency-based assessment in education brought me up to date on a number of changes in the field since I taught school twenty years ago. Coalescing this latest information with my UCC knowledge gave a sense of urgency to the task of implementing competency-based assessment in ministerial preparation. Having arrived at this urgency, I now offer a consolidated glimpse at the histories and offer examples from higher education to support the five principles I offer to those ready to employ fuller use of the *Marks* in their settings.

### **Brief History of Education**

How a topic is taught differs from the assessment of the student’s understanding of the topic. Paulo Freire wrote in *Pedagogy of the Oppressed* that education had become “an act of depositing, in which the students are the depositories, and the teacher is the depositor. The teacher talks and the students receive, memorize and repeat.”<sup>55</sup> He calls this the “banking concept” because a student becomes a bank that houses the knowledge given by their teachers. This is the way education has been practiced and knowledge assessed in schools for generations. Preparation for ministry has often, but not always, followed a similar path. Here’s a brief look back at both of these.

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<sup>54</sup> John Dewey, *Democracy and Education: An Introduction to the Philosophy of Education*, (New York: Macmillan, 1916), 321.

<sup>55</sup> Freire, *Pedagogy of the Oppressed*, 89.

As early as the Han Dynasty in China, 210 BCE, all members of the civil service had to complete tests of skill and performance to qualify for service. Some speculate this is the first recorded example of performance or competency-based assessment for employment eligibility. In the Middle Ages, there were assessments of skill to certify guild membership and mastery. Oral disputations were commonplace at Oxford in the 12<sup>th</sup>-17<sup>th</sup> centuries whereby students were asked a question and then their response was continually questioned so the student might demonstrate their depth of knowledge. In North America, oral exams were the norm until a shift in Boston Public Schools to essay exams in 1845. To work for the US Treasury Department in the first half of the 19<sup>th</sup> century, one had to compose a business letter on command among other tasks.<sup>56</sup>

Education in the US adopted standardized norm-referenced, multiple choice, tests in 1915 with the College Board introducing the SAT in 1926. This was the gold-standard in assessment practices for public schools until the 1960s saw a return of performance and direct assessment for armed and civil service, many vocational trades, and teacher training. These emerged from the 1970s as leaders in the use of performance assessment because of the basic requirement in those fields for integration of cognitive learning with physical tasks.<sup>57</sup>

## **Theological Education over Time**

The seminary education as we in the church today have come to understand it (four years of undergraduate studies followed by three years of graduate level theological study) was born in the United States. “The earliest Protestant Christian churches were led by those who

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<sup>56</sup> Robert L. Johnson, James A. Penny, and Belita Gordon, *Assessing Performance: Designing, Scoring, and Validating Performance Tasks* (New York: The Guilford Press, 2009). This text offers broad strokes of professional performance assessment with snapshots along the timeline in Chapter 1. I summarize that here.

<sup>57</sup> Johnson, Penny, and Gordon, *Assessing Performance*. Again, I am summarizing their historical research.

demonstrated a capacity for leadership.”<sup>58</sup> Most church leaders were educated in the sense that they could read and write, but not all. Priests had received their theological education in monasteries or simply applying their knowledge from the regular Roman Empire education in the field of their passion.<sup>59</sup> The invention of the printing press had great impact on education and Martin Luther’s Ninety-Five Theses and the Protestant Reformation that followed would shift theological education toward the university system and theological studies. Reformer Philip Melancthon pushed for more education<sup>60</sup> and in time the Lutherans adopted the theological degree from a university as standard preparation for the ministry. Within a century of Luther’s Theses, most German pastors adopted this university route to church leadership. Like the Reformation itself, this education expectation for ministers spread across the European continent. Reformers in Great Britain were more humanist, and the study of Greek and Latin classics was preferred by Elizabeth I who desired Anglican pastors to be a natural fit in the ruling class in her court.<sup>61</sup>

Most colonists in America relied on Europe for their clergy. Denominations with roots in Great Britain often preferred a liberal arts education while Reformed and Lutheran traditions tended more toward university theology degrees. In the colonies, it became somewhat problematic to rely on Europe for trained clergy and by the 19th century there was a need to directly satisfy growing religious demand in America. “In some cases, these democratic ministers were people of true spiritual and religious nobility, who sacrificed their own prosperity in order to bring a healing word to their neighbors. But others had more in common with the then

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<sup>58</sup> Miller, “Why the Seminary?” 118.

<sup>59</sup> Miller, “Why the Seminary?” 117.

<sup>60</sup> See his many writings that reformed education on the whole in Germany and earned him the title “Preceptor of Germany.”

<sup>61</sup> Miller, “Why the Seminary?,” 119-20.

commonplace patent medicine salesman, who hawked their wares to an uneducated and unsuspecting people.”<sup>62</sup> Leaders in the church knew something must be done to have a more uniform education for recognized clergy. The free-standing seminary, released from university rules, was exactly what the free market in America and the growing religiosity of the American people needed. “Seminaries became intellectual citadels of divergent dogmas with a highly ideological character.”<sup>63</sup> Lutheran and Reformed traditions continue to have clergy with college plus seminary education.<sup>64</sup>

This is part of the inheritance of the United Church of Christ from our founding streams of German Reformed and Lutheran Churches. As Glenn Miller writes in his essay “Why the Seminary,” one of the strongest supports for seminary is this inherited religious tradition. However, Osmer argues that today “unfortunately, many contemporary schools of theology do not prepare leaders to grasp” the interconnections of cognitive learning and the physical tasks of daily ministry.

“This is a by-product of specialization in the academy, which has resulted in sharp divisions between scholarly fields and the subject areas in the curriculum. In practical theology this often results in courses that focus exclusively on one form of ministry like preaching, pastoral care, or Christian Education. What gets lost in this educational pattern is the interconnectedness of ministry in the congregational system and the congregation’s interaction with its context.”<sup>65</sup>

Osmer’s argument succinctly names several, but not all, of the concerns about theological education that have called on the UCC to expand this inheritance beyond the expectation of a seminary degree. Other contributing voices, like leaders in the UCC, take a social justice route

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<sup>62</sup> Miller, “Why the Seminary?,” 121.

<sup>63</sup> Miller, “Why the Seminary?,” 122.

<sup>64</sup> In New England, most of the universities including Harvard, Princeton, and Yale started as places to train clergy and then expanded to become wider universities. As universities grew around some seminaries like this, the seminary would remain part of the whole.

<sup>65</sup> Osmer, *Practical Theology*, 15.

arguing the seminary degree does not fit the needs of multi-cultural, multi-racial churches today and there is need for greater, inclusive representation among authorized clergy.

## **Examples from Higher Education**

A few examples from higher education may help focus on how competency-based assessment work in the education field and as I work in the *Marks*, it may become more clear how this combination may meet the need for theological education in the 21<sup>st</sup> century church. In the 1970s as the education world was turning again toward competency and skills assessment in some fields. Alverno College in Milwaukee, Wisconsin began to use a competency-based framework with portfolios to focus on the “development of ability integrated with knowledge” for adult learners. Alverno’s model invites students to do what they know first and determine learning needs from that unique starting place. This asks students to reflect on all of life’s learning and can be a “powerful means for turning life experiences into learning.” Alverno’s goals for competency stress broad abilities rather than specific facts or abilities.<sup>66</sup>

Similar to Alverno’s approach, Sinclair Community College in Dayton, Ohio (one of the 20 largest community colleges in America) began studying competency and skills assessment in the 1980s. Their goal was to guarantee entry-level skills of their graduates to local industry in Ohio. It was not until 1992 that they achieved the goal of “skill guarantee”, but following a long season of development, the administration was ready to make that promise to their community. Like most community colleges, anyone can be admitted for courses or full programs so entry level competencies are assessed in a way that growth could also be monitored.<sup>67</sup>

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<sup>66</sup> Michelson and Mandell, *Portfolio Development and the Assessment of Prior Learning*, 69–70.

<sup>67</sup> Voorhees and Jones, “Defining and Assessing Learning,” 65.

This type of competency-based program was also developed at Western Governors University, based in Salt Lake City, Utah, from its inception in 1995. In its founding WGU committed to competency-based degrees and distance education, noting, “The basic building blocks of WGU degrees are the individual competencies that consist of performance descriptions.”<sup>68</sup> Students at WGU move through curriculum programs at their own speed as they demonstrate mastery. Unlike traditional education models where advancement is linked to the time spent in class, there is no basis for promotion on seat-time in WGU’s curriculum.

As recently as 2015, K-12 and postsecondary innovation consultant T.R. Nodine suggested that the total number of competency-based programs in higher education remains small, but that indicators point toward program planning and development at many more institutions. Nodine writes that “Several developments in K-12 education set the stage for CBE implementation in post-secondary education.”<sup>69</sup> Mastery-based models from the 1920s claimed that with the right amount of time and the proper information delivery systems, the majority of students had the ability to master a learning task. This reflects the knowledge banking system that Paulo Freire named in *Pedagogy of the Oppressed* when education becomes “an act of depositing whereby the teacher issues communiques and makes deposits which the students patiently receive, memorize, and repeat.”<sup>70</sup> This type of instruction model leaves about one-third of the students failing or just getting by and paved the way for Benjamin Bloom to postulate in 1956 that individual learning differences should impact the teaching and learning process resulting in a suggestion of more flexible time frames for student mastery.<sup>71</sup>

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<sup>68</sup> Voorhees and Jones, “Defining and Assessing Learning,” 68.

<sup>69</sup> T.R. Nodine, “How Did We Get Here? A brief history of competency-based higher education in the United States,” *The Journal of Competency-Based Education* 1, no. 1 (2016): 5.

<sup>70</sup> Freire, *Pedagogy of the Oppressed*, 89.

<sup>71</sup> Nodine, “How Did We Get Here?,” 6.



## Combining the Educational World with the UCC

This shift in education toward more flexible time frames and personalized instruction met our denomination at a time when there was a decrease in available clergy, a rise in the cost of seminary and a desire for a more diverse clergy. Former UCC General Minister and President, Rev. John Thomas wrote, “The demographic shifts and new cultural realities require innovative strategies for meeting the leadership needs” of churches especially in “those denominations that, in recent history, have almost exclusively defined their authorization for ministry procedures in terms of the master of divinity degree.”<sup>72</sup> This all contributed to the “Ministry Issues Pronouncement” that affirmed multiple paths to ordination in the United Church of Christ at its 2005 General Synod. The *Marks* included in the implementation document that would follow in 2009 (*Draft 3.1*), and revised in 2016, invite the UCC to follow Alverno’s (and others’) lead into assessing adult learners’ ability to demonstrate their knowledge through doing and invite their COMs to live into competency assessment that is broad and informs needed learning and growth for the specific field of ministry. Drawing on all of a candidate’s life experience to establish where they are in their understanding of ministry and the competencies necessary to be successful in the field can allow candidates to answer a call to professional ministry without needing to quit their day-job and relocate to a seminary town.

The “Ministry Issues Pronouncement” offered formal recognition and support for some of the regional theological programs that were already working to authorize ministers without seminary degrees. Rev. Isaac MacDonald, director of the Southern Conference SCOPE

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<sup>72</sup> John Thomas, “Foreword.” in *Multiple Paths to Ministry*, eds. Lance R. Barker and B. Edmon Martin (Cleveland: Pilgrim Press, 2004), xi.

program,<sup>73</sup> writes of the competency-based program that it was structured to meet the needs of a set of congregations in the Afro Christian church tradition. These churches had their “origin in brush arbor meetings that were organized immediately following the Civil War.”<sup>74</sup> These churches were well-led by “unlettered black men and women who heard themselves called. Their theology was a living experience intuited during prayerful walks with God among endless cotton rows. And their theology generated a faith on which the people built and created for themselves a great tradition and a great church.”<sup>75</sup> A call from God, demonstration of leadership, and passion for understanding and following the teachings of Christ was the bar set for black pastors long before schools in America were educating this population. MacDonald writes, “We in the Black Church have a great and glorious tradition of competent, even prominent church leaders who, having been called by God, needed no more than to leave off gathering sycamore fruit, or to have their lips touched by the divine coal, in order that they might go forth and prophesy in God’s name.”<sup>76</sup> The competency-based program that emerged in Southern Conference sought to stay true to this heritage and find paths to authorization for those who were called by God. From 1986-1999, 15 candidates completed the SCOPE program and were ordained.<sup>77</sup> MacDonald concluded, “New ways and new methods and new schools and new workshops and new plans must be explored in order that we may continue preparing” leaders for all churches today.”<sup>78</sup> The Southern Conference would continue exploration and started the Pastoral Leadership

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<sup>73</sup> SCOPE is the acronym for Southern Conference Ordination Preparation Education. This regional program was developed in the 1980s specifically as an alternative track to ordination in the Southern Conference of the United Church of Christ.

<sup>74</sup> Isaac MacDonald, “Called: An Alternative Path to Ordination.” In *Multiple Paths to Ministry*, eds. Lance R. Barker and B. Edmon Martin (Cleveland: Pilgrim Press, 2004), 51.

<sup>75</sup> MacDonald, “Called,” 65.

<sup>76</sup> MacDonald, “Called,” 66.

<sup>77</sup> Margot Pickett, “Essential Information about the Pastoral Leadership Development Program,” (Burlington, NC: Southern Conference UCC, 2013).

<sup>78</sup> MacDonald, “Called,” 66.

Development Program in 2004. Over its 10 years of existence, 28 people graduated the full program and 24 were ordained.<sup>79</sup>

Southern Conference was not the only conference developing programs in the early 2000's to move non-seminary trained pastors toward licensure or ordination in the UCC. Southeast Conference developed *PATHWAYS*, New York Conference has the *NY School of Ministry*, and Minnesota and Wisconsin partnered for the *Damascus Project*, Southern Conference would morph *SCOPE* into the *Pastoral Leadership Development* program that had great success noted above, and Penn Central Conference joined with Penn Northeast and Pennsylvania Southeast Conferences to form a Lay Ministry Academy. The denomination, through its local churches, associations and conferences, was recognizing the need for ministerial preparation outside the seminary that moved candidates into authorized ministry. The *Marks* offer us a way forward using competency-based assessment well rooted in K-12 education and growing in secondary and post-secondary institutions.

“It is very challenging to create, plan and implement competency-based systems” according to the 2002 report of the National Postsecondary Educational Cooperative.<sup>80</sup> The Cooperative shared publicly results from eight case studies of competency-based initiatives in post-secondary institutions with the majority still in their early phases. In this report, the authors define competencies, discuss the importance of the “standardization of terminology and semantics that can lead to the transportability of competencies,” and set a roadmap for using competencies in building a bridge from credit hours to actual learning.<sup>81</sup> I saw this a way forward for committees that feel stuck in using the *Marks* and drew five principles from the 12 they offer

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<sup>79</sup> Pickett, “Essential Information about the Pastoral Leadership Development Program.”

<sup>80</sup> Voorhees and Jones, “Defining and Assessing Learning,” 12.

<sup>81</sup> Voorhees and Jones, “Defining and Assessing Learning,” 12.

institutions that guided the program development here in Penn Central. The Cooperative names the first component of a competency-based initiative as a description of the competency. The UCC list of *Marks* offered in the Manual on Ministry is the decisive list. Second, this report calls for a standardized and embraced means of measuring or assessing the competency.<sup>82</sup> There is a standard rubric available, but it is not widely known and without the third component offered in this report, a standard by which someone is judged to be competent, committees do not have confidence in their ability to measure candidate competencies. The portfolio offers a way for the candidate to exhibit their skills in both familiar and new ways, and for the committee to build confidence in their ability to measure competence. It is vital that those charged with assessment are well-versed in the *Marks* and are provided specific training for assessing candidate portfolios.

### **Five Principles for Committee on Ministry Candidate Assessment Programs**

This report from the National Postsecondary Education Cooperative used case studies of both postsecondary schools (i.e. Alverno) and businesses (i.e. Ford Motor Company) to suggest twelve principles for institutions in developing their own competency-based initiatives. Using these institutionally inspired twelve and combining them with a practical approach, I propose five principles for Committees on Ministry in the United Church of Christ to build *Marks*-centered processes for the assessment of candidate competency as the new yardstick for measuring ministerial candidates. This progresses into Osmer's third and fourth tasks of normalizing what should be going on and designing how to make that reality.

#### **1. There must be broad acceptance and buy-in of the measurable competencies known as the Marks of Faithful and Effective Authorized Ministers.<sup>83</sup>**

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<sup>82</sup> Voorhees and Jones, "Defining and Assessing Learning," 26.

<sup>83</sup> Voorhees and Jones, "Defining and Assessing Learning." This principle combines the Cooperative's principles 2, 3, and 4 which include consensus on specific competencies with broad acceptance across relevant stakeholders.

The *Marks* are competencies with an array of applicability across seasons of ministry and cultures within the UCC, as well as transferable across generations. They must first be embraced by the denomination so they can be applied as the competencies for assessment of ministerial candidates. In my work with COMs, members simply do not know the actual *Marks*; they only know of their existence. When training committees on ministry and especially when I trained the assessment team, I stress the importance of familiarity with each of the eight *Marks*. It is important when learning them to read them every day. (When I was learning the *Marks*, I chose one *Mark* a day to read several times and to think of as many examples as possible so that I could use *Marks* language, not just the words “the marks,” in every COM meeting in a variety of ways.) This learning invites committee members and candidates to become familiar with the tone and timbre of the *Marks* and see them in everyday circumstances. The *Marks* are language every candidate should be using when preparing their portfolios and it is the language that must be used to respond to portfolios and affirm competency or need for growth. When a candidate shares a narrative about visiting a church member in hospice care with their supervising pastor and shares their discomfort with the facility and the ways that the pastor and member discussed death and heaven, the committee could frame their assessment and response in *Marks* language such as:

- The candidate demonstrated their ability to *Engage Sacred Stories and Traditions* in listening to the parishioner and affirming their hope based on scripture stories and their own memories. It is further demonstrated in adding supporting scriptures to the conversation. This offers insight into the candidate’s scriptural knowledge and the ways they hold parishioner’s stories.

- *Caring for All Creation* is also demonstrated in the ways the candidate is disturbed by the state of the facility and in their ability to not engage a debate about atonement when the parishioner is at death's door. *Caring for All Creation* is also seen in the candidate's reflection as they discussed the experience with their spiritual advisor and supervising pastor after the visit. Seeking feedback and their own pastoral care are important demonstrations of this competency.
- This visit also addressed the competency *Participating in Theological Praxis* as they offer a theological and faithful lens to some of the human experiences that are shared by the parishioner. Care should be taken when doing this at this stage in life's journey and the committee did engage discussion on how this conversation developed.
- Finally, this visit pointed out room for growth in the competency *Strengthening Inter- and Intra-Personal Assets* lifting up the well-written communication of the experience, encouraging exploration of why the visit produced so much discomfort for the candidate, and encouraging the candidate to reflect on a similar experience after work is done in this area.

To produce assessment notes like this every member of the committee would need to understand the *Marks* thoroughly and what actions in ministry might demonstrate a candidate's competency in any one or more of the *Marks*.

In my experience this learning and incorporation of the *Marks* may be the hardest part of the implementation of the *Marks*. Committee members will acknowledge the existence of the *Marks* but cannot really name them even after years of service to the COM. I focus on the eight competency categories and highlight that many actions of a candidate may demonstrate one or

more of those eight. I often use the example of how a sermon can illuminate competencies across all eight *Marks*. When the list is expanded to include the six sub-marks in each category, it can limit the committees' ability to see actions beyond the specifics noted as valid displays of competence. In Popham's critique of rubrics, he encourages finding a balance between task-specific and excessively general evaluative criteria.<sup>84</sup> Focus on the eight *Marks* can help establish that balance for Committees on Ministry and let an assessor see knowledge applied as competence across multiple *Marks*. It may also be culturally significant to recognize the ways candidates from outside the dominant culture may exhibit their understanding or passion in a given area indicated by the broad categories. For example, a young, LGBTQ Member in Discernment may have a large following on Tik-Tok with content that integrates their theology around radical hospitality using pop culture icons and images, as well as song. Members of the Committee on Ministry may not readily recognize this as *Participating in Theological Praxis* or *Building Transformational Leadership Skills* because of the avenue of presentation. Likewise, an African American MID may submit sermons with reflections that do not read or view in the same ways as a largely white committee hears on Sunday mornings or were taught to write sermon in their seminaries. This is a demonstration of competence in *Engaging Sacred Stories and Traditions*, among others. Neither of these candidates' competencies should be valued less because those around the table have limited exposure beyond their own cultural norms and expectations.

Consistent use of the vernacular of the eight *Marks* will help candidates to embrace these as the core competencies of the field of authorized ministry and will encourage consistent development over the life of their ministry. Often the *Marks* are seen as a tool for members in

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<sup>84</sup> Popham, "What's Wrong."

discernment only, but they are applicable across the life of ministry. In Holly MillerShank's report on Committees on Ministry in the UCC, it was noted by some committees how there is a need for a way to measure and ensure ministerial competence post-authorization. Constant use of the *Marks* as competencies with candidates and their authorized advisors may also help to introduce another generation of clergy to these competencies for wider consideration. Lizardy-Hajbi pointed out in her report on connections of church vitality and pastoral competencies how seminaries often teach students to "think theologically, interpret scripture, preach, provide pastoral care, and lead worship and ritual."<sup>85</sup> The *Marks* integrate many of these skills into a broader leadership model that Lizardy-Hajbi argues is important for the health of churches. COMs and the wider UCC must embrace the eight competency categories as THE COMPETENCIES of authorized ministry in the UCC in order for a shift to this type of assessment to occur.

**2. Developing a deep understanding of competency and doing assessment of competencies across multiple pieces of work (artifacts) to create a showcase of candidate knowledge and skills.<sup>86</sup>**

Competencies are defined as the "combination of skills, abilities, and knowledge needed to perform a specific task."<sup>87</sup> The Postsecondary Education Cooperative's study noted across the institutions they reviewed how faculty and staff chose "multiple measures to directly assess certain competencies."<sup>88</sup> One work product, a snapshot, cannot show the full combination needed to demonstrate competency. For example, several sermons in

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<sup>85</sup> Lizardy-Hajbi, "Congregational Vitality and Ministerial Excellence," 4.

<sup>86</sup> Voorhees and Jones, "Designing and Assessing Learning." This correlates to the cooperative's principle number 5 naming the importance of multiple assessments of competencies.

<sup>87</sup> Voorhees and Jones, "Defining and Assessing Learning," 7.

<sup>88</sup> Ibid, 42.



combination with pastoral care notes and worship liturgies may come together to demonstrate theological understanding of a certain topic and show some competency in two *Marks* - *Participating in Theological Praxis* and *Engaging Sacred Stories and Traditions*. This may be demonstrated through engagement with scripture, development of worship practices, and incorporating that in their visit with a shut-in who attends worship via the live stream.

The showcase portfolios are compiled over time and include a variety of work samples. Competency-based portfolio assessment allows for accessing and assessing the current knowledge and skill set of candidates through their own demonstrated actions and reflections. In building a portfolio, or evidence of competency, candidates must begin to “grapple with their expertise not as something solid and the easy arbiter of all truth claims, but as a problematic and changing notion.”<sup>89</sup> This way students can be encouraged to place what they know within the context of professional ministry by using the eight competency categories of the *Marks*. This approach also encourages candidates to look ahead and plan for more learning as their new field of expertise expands and grows.

Among committee members, across the denomination and even within some candidates, there is a competing sense of what is important to know. If candidates are seminarians directly out of college, their minds are still very much in academia and pleasing the teacher/grader is a skill set they likely have mastered. The *Marks* offer a standard guideline for what the assessors need to see from them. Second or Third career candidates and those from other fields may need help in translating their existing skills into *Marks* related competencies. The *Marks* offer a framework for highlighting a candidate’s existing competencies for application in a new field so that the assessment committee can better pinpoint the specific growth needed. Someone coming

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<sup>89</sup> Michelson and Mandell, *Portfolio Development and the Assessment of Prior Learning*, 57.

from a financial background may have expertise in profit and loss calculations and budget creation skills (*Building Transformational Leadership Skills* and *Exhibiting a Spiritual Foundation and Ongoing Spiritual Practice*) yet lack the theological resources necessary to craft a narrative budget for the church (*Participating in Theological Praxis* and *Engaging Sacred Stories and Traditions*).

### **3. Formal Training for those doing the assessments that includes clear methodology for completing the assessment process.<sup>90</sup>**

This is where we as the UCC have plenty of room for improvement. Very little in our denomination is consistent. When Rev. Holly MillerShank did her report on Committees on Ministry in 2015, her first conclusion was “Associations/conferences recognize and honor the importance of Committee on Ministry work; however, the inconsistency across settings is apparent. There was a strong recognition throughout this project that increased consistency and excellence is desired.”<sup>91</sup>

Also from MillerShank’s report, Member in Discernment requirements are not standardized, demonstrated by three of the responding conferences not requiring UCC History and Polity and only half of the responding Conferences requiring Clinical Pastoral Education. The commonality of the ordination paper is not noted in the report; however the *Manual on Ministry* does note that when a candidate has completed their preparation and formation plan demonstrating competency across the *Marks*, the “Member in Discernment prepares an ordination paper or portfolio presentation for and ordination interview” and Ecclesiastical

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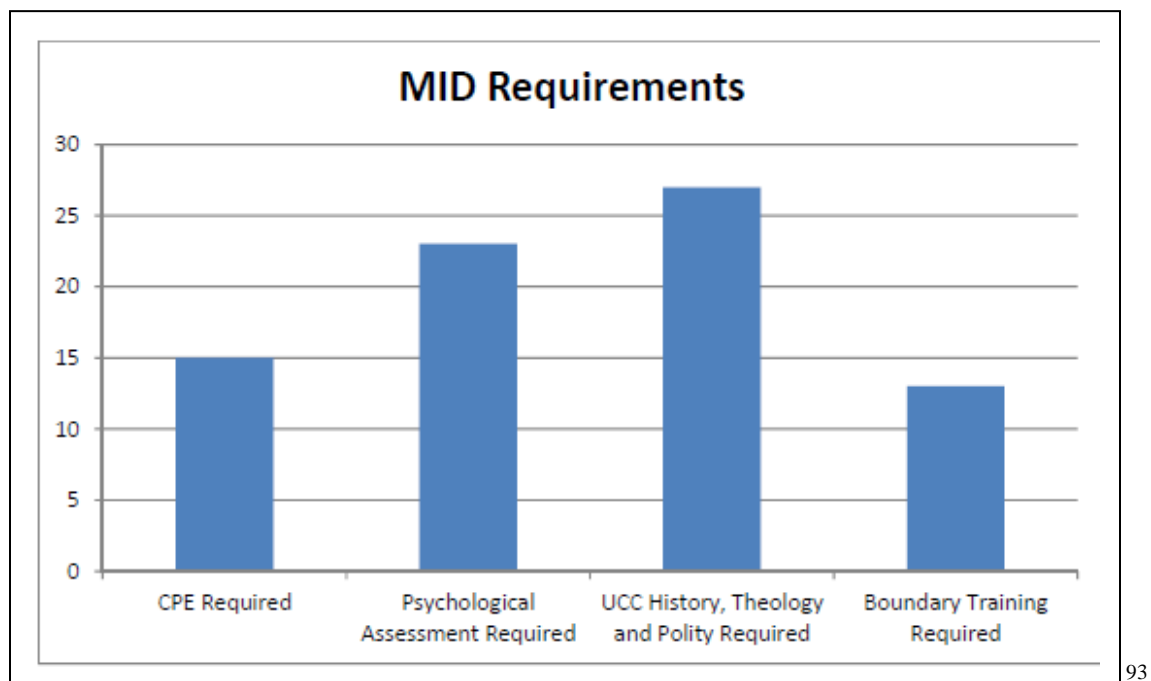
<sup>90</sup> Voorhees and Jones, “Designing and Assessing Learning.” This is not directly tied to one of the Cooperative’s principles. It is an outgrowth of their principle number 7 that stresses how the “precision, reliability, validity, credibility and costs” should be studied. The Cooperative tied the reliability and credibility of assessments to “the formal training that faculty developed for all reviewers and raters of student work.” 43.

<sup>91</sup> MillerShank, “UCC Committee on Ministry Research Report,” 4.

Council.<sup>92</sup> Even with this recommendation in the *Manual*, there is no noted consistency in its use in the report.

Additionally MillerShank notes:

- 13 conferences reported boundary training was required for all MIDs.
- 2 conferences require a social justice project
- 5 conferences mentioned requiring criminal background checks for MIDs.
- 2 conferences mentioned a robust mentoring program requirement
- 1 conference requires a Master of Divinity for ordination
- 1 conference requires a MID Portfolio
- 2 conferences require a UCC Ministerial Profile as part of the discernment process
- 1 conference reported spiritual direction was required on a case-by-case basis.



The *Marks* give us a common set of competencies. Now a denomination-wide training for assessment of those competencies would provide some much-needed consistency in their use. At issue is the congregational nature of our church body and the resistance to anything standardized or church-wide. A former standard that was widely accepted was a seminary degree from an

<sup>92</sup> MESA, *Manual on Ministry*, 32.

<sup>93</sup> MillerShank, “UCC Committee on Ministry Research Report,” 10.

Association of Theological Schools accredited seminary, but as already highlighted, for ministerial candidates from non-majority groups like indigenous peoples and African Americans, as well as second-career pastors, many associations were already experimenting with alternative methods of candidate assessment and authorization.

The National Postsecondary Education Cooperative study noted how universities often started their assessments with commercial tests that are used broadly across education, but most schools developed local assessments to look for specific competencies related to their programs or courses of study along with their scoring rubrics. “They then spent considerable time training all raters. The formal training that faculty developed for all reviewers and raters of student work helped to promote the reliability of these assessments.”<sup>94</sup> In order for the UCC to do this well, we will also need to train our assessors for this work.

Committees on Ministry across the denomination are comprised of lay and clergy from the memberships of our local churches. Often the training for this committee is annual and one might serve on a committee for several months without anything more than a copy of the *Manual on Ministry* and anecdotal advice offered during meetings. For a competency-based assessment program to be effective, it will be important to train all members expected to participate in the assessment work *before* their first meeting. For these assessment programs to be seen as valid across the denomination, a standardized training would be helpful.

**4. Assessment is of demonstrated competencies and tied to learning goals, both linked to growth of understanding in specific *Marks*.<sup>95</sup>**

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<sup>94</sup> Voorhees and Jones, “Designing and Assessing Learning,” 43.

<sup>95</sup> Voorhees and Jones, “Designing and Assessing Learning.” This principle correlates to the Cooperative’s number 10.

When assessors view artifacts in the portfolio, each item stands as a single snapshot and also as a part of a larger body of work. Submissions should be reviewed regularly, and feedback given in terms of what level of competency is demonstrated by single items in concert with the whole body of work. The common rubric offered by the national office of the UCC names Experience, Understanding, Integration and Passion as the four levels of proficiency or competency. This means that each artifact should be ranked on that scale. For example, a sermon may demonstrate passion for a social justice issue and yet lack theological understanding for why others should feel similarly. Feedback would note both the passion in *Working Together for Justice and Mercy* and the more limited demonstration of *Building Transformational Leadership Skills, Participating in Theological Praxis*, and possibly *Engaging Sacred Stories and Traditions*. In conversation with other artifacts, the candidate's theological integration in a different area may give evidence for direct feedback on expected growth. For example, in this Bible Study on the book of Luke, deep theological understanding for why members should support this sample cause is shown, but when this cause is referenced in a sermon, there was very little theological foundation demonstrated. The assessors might say something like they would like to see more explicit building of the theological argument for social justice support be consistent across work products. This is also an area to demonstrate deeper engagement with common sacred stories and traditions including scripture. Assessors should recognize that sermons and Bible studies are different environments for teaching and learning so the candidate's self-reflection for each artifact may be where the evidence of competency is demonstrated rather than in the artifact itself.

**5. When adequate competency is met, uniform reporting to all stakeholders is shared.<sup>96</sup>**

Because our Committees on Ministry have historically relied on transcripts to tell them a candidate's knowledge, a new reporting system will need to be developed that meets local needs. As I will show when discussing the implementation in Penn Central Conference, each committee may work through a number of drafts to determine what reporting form will work best for them. In general, it is important to name the *Marks* and the level of competency met by the MID. Our committees really wanted to hear in which sets of artifacts a *Mark* was demonstrated. For example, a candidate may demonstrate their competencies in the *Marks Caring for All Creation*, *Working Together for Justice and Mercy*, and *Participating in Theological Praxis*, as well as *Strengthening Inter- and Intra-Personal Assets* through sermons, case studies, advocacy work with a non-profit, and faith formation curriculum development around LGBTQ justice issues. This was reported from our group on a grid so that the association Committee on Ministry might see integration of the candidate's competencies.

This whole project is an exercise in practical theological interpretation, Osmer might say, in that it creates a bridge between the rigorous academic preparations of ministers in previous generations to the multi-faceted, competency-based approach for assessing ministerial candidates in the United Church of Christ today using the *Marks of Faithful and Effective Authorized Ministers*. There is more than one way to implement competency-based assessment in line with the *Marks* and what follows is one of the possibilities that may help Committees on Ministry employ this technique using a showcase portfolio and designated assessment team.

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<sup>96</sup> Voorhees and Jones, "Defining and Assessing Learning." This correlates to Cooperative principle number 11 which includes reporting.

These five principles help build a response to the changes the new *Manual on Ministry* asks of committees across the denomination. This is Osmer's pragmatic turn and final task. Conceptually it answers my research question of how UCC Committees on Ministry might embrace and implement competency-based assessment in meaningful ways. The following chapter will test the concept in our Penn Central experiment.

## **Chapter 4: The Penn Central Experiment**

**Working Group Discernment**

**Assessment Team Work**

**Candidate Examples**

**My Training Module**

The tasks one performs and the work accomplished are demonstrations of cumulative knowledge. Knowledge gained from the classroom, intentional education endeavors, accidental life experiences, jobs, interactions, relationships, and everyday living. Some learning can be read on transcripts, but it is most often seen in action. This is daily demonstration of one's competency. It can be seen in a Member in Discernment as they lead a faith formation class in their field education placement or write a paper for their theology class. Competency can be demonstrated in a sermon or in an encounter in the produce section at the local grocery store.

I have been teaching the *Marks of Faithful and Effective Authorized Ministers* to Committees on Ministry in the UCC since I began judicatory work in 2012. As a former educator, I was fascinated by this list of then 64 explicit skills and areas of knowledge expected from those seeking to be ordained. I attended workshops on their use and purchased all the resources the national setting made available. I developed a portfolio design encouraging ordination candidates (Members in Discernment) to show evidence of their knowledge and skills in these areas.

My portfolio design concept was based on my classroom experience as a high school social studies teacher. I taught a course called "World Cultures." It was not on the college preparatory track and often was filled with students who had seen limited academic success. I desperately wanted them to learn, and testing had proven to demonstrate only what they hadn't learned. We began doing portfolios for every culture we studied: maps, language recordings,



videos, food preparation, music collections, clothing designs, and details of everyday life. Students were drawn in and at the end of the unit, I was able to see what they had actually learned and what they were able to share with their classmates. These were things they felt they would never forget. (Reading Barbara Brown Taylor's *Holy Envy* reminded me of those projects. Students were often fascinated with other religions.) In World Cultures, my goal shifted from bulleted learning objectives included in my lectures, to the student's ability to demonstrate knowledge gained about a certain culture in ways and on topics of their choosing. Each unit still included map quizzes, lectures, and projects, but the projects were far more open to student research on something they found interesting in the lectures rather than the assigned topics of my former method.

As a teacher, I was directing their learning to be sure, but I wanted them to have some ownership in the learning and I wanted to see what they were excited about and had actually learned, not just mark things right or wrong on tests and quizzes. My students showed remarkable learning and course enrollment increased as an elective across the spectrum of all students and grades.

Because of this background, I approached the *Marks* as ways for candidates to show off what they could do. Committees were used to receiving a transcript and assuming knowledge and skills in the given candidate based on what the transcript showed. Candidates were used to taking classes and writing papers. Even non-seminarians had been conditioned to this method of assessment. Asking them for case studies or artifacts that demonstrated learning just didn't really take hold. I was sure this was something that would work. Why couldn't I implement it well?

I struggled off and on with this portfolio idea for several years and then I read Paul Schmitz' *Everyone Leads* and was introduced to the US Army's leadership training approach of *Be Know Do*. "Know: the competence of a leader"<sup>97</sup> was being read at about the same time as articles on competency assessment in Individualized Education Plans (IEP).<sup>98</sup> I began to think about the *Marks* as a list of competencies, and all of my previous thoughts on how to do the portfolio began to shift. I didn't really know about the movement toward competency-based education and assessment in public schools, colleges or post-secondary institutions, but I knew I had found language to help me bridge the gap between the thoughts in my head and the work I was asking of candidates and committees.

In reading about the US Army leadership approach, *Be Know Do*, I also learned the process for After Action Reports. Lots of individual voices prepare an After-Action Report and a designated group of leaders review those reports. Each one answers four questions: what was planned to happen, what did happen, what went well and why, and what can be improved and how. Answering the "what happened" question is straight forward. Answering "why and what was intended" are more about reflection and learning for all involved. I saw value in the process of the reflection and group discussion in these reports, not unlike Clinical Pastoral Education for pastors. Portfolios needed to include the equivalent of these After-Action Reports with deep reflection from the candidate. In the *Be Know Do* manual, the Army notes "there's nothing wrong with making mistakes, but there's plenty wrong with not learning from those mistakes. Reflection is the means to that end."<sup>99</sup> It is in the reflection that one learns and the After-Action Report, like the case studies and artifacts candidates provide, give form to the reflection so that

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<sup>97</sup> Schmitz, *Everyone Leads*, 82.

<sup>98</sup> I am learning to be a parent advocate for a child with an IEP.

<sup>99</sup> Hesselbein and Shinseki, *Be, Know, Do*, 54.

meaning can be made. Asking and answering these four questions: what did you think would happen and what really did happen, alongside, what went well and why, as well as what could be improved and how, provide a formula for reflection that points toward the development of deeper competency.

I have been searching for a way to really engage the *Marks* with the committees I serve since I began conference work staffing COMs in 2012. As mentioned, there have been fits and starts but nothing that ever seemed to take hold with committees who already felt overworked. Committees wanted “programs,” “certificates,” and “degrees,” not individualized plans for every Member in Discernment. It seemed to me that the *Marks* were calling for exactly that - an individualized plan for each candidate - and all the meetings and training sessions I attended were saying the same thing. All arrows were pointing toward an end goal without a plan to get there. This new knowledge and competency approach from the Army gave me new eyes and energy for another tactic. Committees were often willing to try something small as long as I would make a specific ask with clear objectives and steps, they were willing to try.

## **Working Group Discernment**

Here in Penn Central Conference, very few of the Committees on Ministry were engaging the *Marks of Faithful and Effective Authorized Ministers* when I arrived. I set out with each group to incorporate use of the Marks into the assessment work they were doing with candidates’ ordination papers and made some progress to strengthen engagement with the *Marks*. When the 2018 *Manual* was published committees were again naming their hesitancy to do more formal assessment of candidates beyond those papers. I pushed against them and learned that a seminary degree was entrenched as the default and most COMs here in Penn Central were not in a place to consider non-degree MIDs for ordination. Those MIDs were certainly eligible for a license, but

that continued option ended with the new *Manual* moving to one form of authorization. Our Commission on Ministry, consisting of 9 committee chairs plus one member from each COM, named a working group to explore greater engagement with *Marks* assessment for this new single authorization that was presented in the *Manual*.

The working group determined that this type of assessment would best be done by a designated group not necessarily the existing nine committees on ministry. New MIDs brought into the process after October 2019 would begin working with the Assessment Team. Other MIDs would complete their process with the local association COMs unless specifically asked to move into the new process. We hoped it would be seamless but knew that was unrealistic.

### **Assessment Team Work**

We recruited representatives from each of our associations seeking COM experience, lay-clergy balance, diversity across UCC theology as well as LGBTQ voices. A team was formed, and we met in January 2020 for a 6-hour training session. The recruitment period took longer than anticipated by the working group, but the few new MIDs were asked to be patient and begin pulling together their initial submissions.

I spent the first hour or more in icebreakers using the *Marks* as foundational language. As I explained the purpose of the new committee and the great need for us all to speak this Marks language, there began to be some understanding among the team. Recently authorized members of this team were excited to see a coherent plan that engaged the *Marks* rather than just talk about them as had been their experience.

Next in the training, we spent time discussing what artifacts would be helpful for us in seeing these competencies demonstrated. Our initial list included:

- Formal transcripts

- Psychological evaluation
- Letter from people who had experienced the MID's ministry
  - Pastors, elders, deacons
  - Colleagues
  - Current or Past congregants
  - Judicatory leaders
  - Community relationships
  - Supervisors, Mentors
- Documentation of informal learning experiences connected to Marks growth
  - Workshops
  - Retreats
  - Regional Theological Training Programs
  - Courses
- Reflections on Ministerial Experiences and Case Studies
  - Sermons and Worship Materials
  - Pastoral Care Experiences
  - Curricular Materials developed by MID
  - Newsletters, Publications
  - Protest/Activism Experiences
  - Field Education
  - Mission/Outreach Planning, Participation, Leadership
  - Evaluations from Supervisors (field ed, CPE, etc.)
- History and Polity Paper or Project

The Team decided that they wanted to meet with the MID at the outset to clarify expectations and explain the differences between this team and the MID's Association Committee on Ministry. While I had felt that anonymity would be important, the team noted the goal was to assess the whole person and they would need at least this first session with them to do that. Conscious of how this could offer confusion to the MID as to who was who in the process, the Team wanted to make clear the roles of each group. The delineation of roles was drafted with the expectation that we might stumble early but eventually find a good balance.

#### Local COM

- Assist with Sermon Observations from at least 2 association churches each year
- Assignment of Advisor who covenants to meet quarterly with MID
- Establishment of Local Church Discernment Committee who meets quarterly with MID
- Connections with Association and Conference Leadership for Meetings, Ministerium, etc.
- Participation in Seminary CVR as necessary
- Yearly Meetings reviewing reports from Assessment Team
- Connections with MESA for regional MID events and Synod

- Decision to schedule Ecclesiastical Council following Assessment Team guidance

#### Assessment Team

- Preparation and Formation Plan Development with Monitoring
- Artifact Assessment and communication with MID
- Ordination Paper Draft
- Regular updates shared with Association COM regarding MID's progress with the Marks

The Association Committees on Ministry and the Portfolio Team recognized that each had specific roles and that communication would be very important. The first few candidates were definitely a training ground for everyone. We had outlined on paper the following process to try to keep everything moving.

- Association COM grants MID status and shares the MID application with the Portfolio Team
- COM sends MID welcome pack to MID, MID church, and Advisor
- Portfolio Team reaches out to MID to schedule initial meeting (casual, get-to-know dinner)
- MID submits initial artifacts and psychological evaluation
- Assessment Team reviews artifacts and notes Marks with demonstrated ministry and areas where attention might be directed more learning and growth and shared this plan with MID and COM Chair
- MIDs would add artifacts to a google drive shared with the Assessment Team and alert the Team Chair when new items were uploaded
- When general Marks proficiency was noted, an ordination paper would be drafted
- Assessment Team would offer first draft feedback and remind the MID that their local COM may have additional recommendations for the paper as they prepared for the Ecclesiastical Council
- Assessment Team would send copies of all MID correspondence to COM chair and there would be a formal hand-off after review of the ordination paper draft

This process was adapted as we began working with the first few candidates in February of 2020 and then the Coronavirus Pandemic necessitated immediate changes to our meeting with candidates and one another. All meetings shifted to Zoom and the Team determined that meeting every-other-month would offer enough time to onboard MIDs with us and for us to review artifacts submitted. We met with MIDs for their first “dinner” session as we called it to try to keep the informal setting that we had hoped for. These meetings seemed to go well with few

questions from the candidates as they were just getting started. Our Assessment Team was off to a good start with Members in Discernment, but we would go through a few iterations of reporting before we found common ground with candidates, advisors, and local Committees on Ministries.

Initially the committee wanted to look at artifacts as they came in on each MID's Google Drive. This was found to be cumbersome and could invite confusion in our assessment, linking different MID work together across candidates. We decided it was best to review all new artifacts for a given MID just prior to our meeting when their plan was on the agenda. This way we were only looking at one candidate at a time.

The team also tried a few different reporting methods. Initially offering narratives about each *Mark* for a given MID, but both advisors and local COMs found it difficult to follow and keep track of where the MID was in relation to their preparation and formation plan and timeline. A shift was proposed using a grid listing each *Mark* and noting the artifact where competency was exhibited, or growth needed. A follow-up column was added so that the team, their advisors and committees could all be pushing in the same direction. In our reports back to local Committees on Ministry, the assessment team continued to offer some narrative feedback on their time with the MIDs but the added chart, specifically referencing the artifact and *Mark*, was easier to follow.

The team also adjusted their artifact expectations and added the requirement for personal reflection with each artifact. Initially, the only personal reflection and Marks assessment was linked to the case studies following the After-Action Report model. The team determined that we needed that type of reflection from the MID on almost all artifacts.

One of the challenges we met without immediate recourse is the frequency of change in local committees. In the course of a year, some committee chairs change in spring, some in late fall and one on January first. This has felt like a constant shift in expectations from COMs and the Assessment Team continues to wrestle seeking a single method of communication to all our COMs in Penn Central.

By fall 2020 (nine months in), we had a good process and even had two candidates ready to submit ordination paper drafts to their local Committees on Ministry. We seemed to have found a good meeting and correspondence rhythm with our MIDs and with some of our COMs but were still on shaky ground with others. Most committees meet monthly while the Assessment Team only meets every-other-month. Some chairs wanted monthly feedback even if we weren't meeting candidates or assessing artifacts on that frequency. The Assessment Team worked on letters that better outlined how often they would look at portfolio submissions and/or meet with the MIDs. The Team has found that reviewing artifacts in preparation for a specific meeting helps keep each MID's skills distinct from the others. Initially we were reviewing as they came in, but it made discussion challenging as MIDs became one person rather than distinct individuals. We do not feel meeting with candidates needs to occur more than annually for the Assessment Team unless requested by the MID. Associations that were still finishing the MID process with existing MIDs who would not use the Assessment Team were (and to some degree still are) having a hard time adjusting to parallel, yet different, processes.

Some of our learnings and adjustments so far include:

- More clarity in number, type and frequency of artifact submission – We have some MIDs who submit sermons and worship materials every time they preach while other MIDs are a year in with not a single submission. We are setting review dates on six-month schedules for each MID and outlining artifact expectation to meet benchmarks in the areas we noted as growth areas of focus. The broad list was a challenge for new MIDs who felt they needed some of everything on the list. We want to keep it broad enough for



creativity and the ability to see all of the MID's strengths but offer specificity so that we can also curb anxiety and help steer MID's in the directions of needed growth as well.

- Inclusion of self-assessment in line with *Marks* on each artifact submission – This was inferred, we thought, but are making it explicit.
- More formal structure in our feedback correspondence – We developed a *Marks* chart to help our team and MIDs keep an overview of the *Marks* always in front of us. The more narrative feedback that we had planned was not helpful as the *Marks* did not stand out and committees, as well as candidates, were missing the affirmations and growth directives.

The Assessment Team and I have concluded that it is helpful to have this separate group to do this specific work with MIDs; however, it is possible for an Association COM to do it just as some of ours are with MIDs who have been in process before the Assessment Team began its work. Training for the task of assessment is key. Fluency in and memorization of the *Marks* is also very important. Feedback should always be in terms of exhibited competency in a *Mark* area or need for growth in a *Mark* area. This type of assessment invites the committee to look at the whole person. A transcript may show knowledge, but using the *Marks* demands field specific application of knowledge demonstrating real competency. By addressing some of the unwieldiness of the forty-eight *Marks* and focusing on the eight big *Marks*, the door was opened for the assessors to look for the demonstration of 8 *Marks* across numerous artifacts. This was not an easy move for the committee to let go of the specifics offered by the forty-eight while also recognizing they might see that very thing in looking for demonstration of the big header *Mark*. Because the training on assessment was a sticking point along the way, I developed a specific training module that could be helpful for any COM wishing to strengthen their use of the *Marks* and possibly move to competency-based assessment using a portfolio system like Penn Central did.

## **Candidate Examples**

This is the model we used, but questions may remain about how it works with Members in Discernment. Here are a few possible scenarios from the team's work:

- A seminary graduate, new to the UCC, was seeking authorization. This candidate met with the Assessment Team early in 2020 and had submitted a number of artifacts before that first meeting in anticipation of feedback. They were highly motivated to move through the process and search for a settled position in a local church. After meeting with this candidate, the team reviewed the artifacts and discussed how to present the results. The team struggled with the rubric offered by the national church and offered narrative responses to each *Mark* in regard to demonstrated competency or need for growth. This candidate had been in ministry in other denominations without authorization for some time and submitted a number of case studies and references to show competency. The team did see need for growth in understanding of UCC polity and the depth and breadth of UCC theology. In all other *Marks*, this was a candidate competent and ready to lead a congregation. The candidate submitted an ordination paper draft and the team again pointed to areas of the paper that needed more development as had been seen through the artifacts in the portfolio, again mostly specific to UCC knowledge and identity. The candidate attended meetings and shadowed clergy to learn more about the denomination. After about nine months, the team referred the MID back to her local committee on ministry with assessment results and a paper draft. About three months later the candidate was approved for ordination pending call. They were called to a local PCC church and ordained 16 months after starting with the assessment team. (It should be noted this candidate had

been exploring the UCC for a few years and attending seminary before engaging the Member in Discernment process.)

- A seminarian in their second year asked to meet quarterly with the committee in the first meeting with the team. A number of artifacts had already been submitted and the team began their assessment. Members sent notes to the team scribe who worked with me to make another attempt at a reporting format. We tried a couple different grid formats and landed on one that was appreciated by the rest of the team, as well as the candidate. However, there was still resistance to the four-fold rubric offered in MESA resources. We found ourselves using phrases like “I don’t see this evidenced in the artifacts,” and “I think they are really working on this one” or “this is a real gift for them.” This led us to the rubric of “Not Seen, In Progress and Demonstrated” and we noted in the grid the artifacts where some evidence or proficiency was seen. This candidate was also one of our first and is still in process. Artifacts have included sermons, sermon evaluations, case studies, recommendations, a CPE evaluation and papers from seminary courses. We meet about every six months with this candidate. Quarterly was too frequent as more MIDs were referred to the assessment team. This candidate has been in process with the team for 20 months as of this writing.
- Another candidate has been hesitant to engage the process sharing with their advisor they just don’t feel they have enough experience yet to complete even initial parts of the portfolio. We have offered encouragement for this candidate to just submit things but have not developed an approach for how to respond when candidates do not submit the needed items. This candidate is a seminarian and has been with the team about 14 months.

- We have had one candidate withdraw from the discernment portion of the journey after working with us and their advisor to discern the call was not to ordination but rather to a single church for this season. This candidate also holds Lay Ministerial Standing and will continue to be monitored by the local association committee on ministry for renewal of that standing. This second-career candidate was not a seminarian and continues to take courses in the regional theological program offered at the seminary and attends conference continuing education events. This candidate was with the assessment team for about 6 months.
- Another second career, non-seminarian continues to work in their first vocation full-time and very part-time with a local congregation while also submitting artifacts for the assessment team. Some are case studies of interactions they have in their day-job with clients demonstrating high levels of competency in some of the *Marks*. This candidate is working on the theological underpinnings and public speaking aspects that will help them transition from one service career to another in parish ministry. This candidate has been with the assessment team for just under 12 months.

The Assessment Team has met with nine candidates since February of 2020. Three have completed their assessment or discernment with one already ordained, another scheduling their ecclesiastical council and the third discerning their call was not to ordination. The remaining six are at various places on the journey with some very engaged and others less so. Work remains for the Assessment Team in helping to fully engage both the association Committees on Ministry and some reluctant MIDs. We also have work to do in better defining artifacts for candidates with significant life experience but limited ministry experience. There is a strong desire to incorporate the Committees on Ministry, or at least the MID Advisors, more into the process.

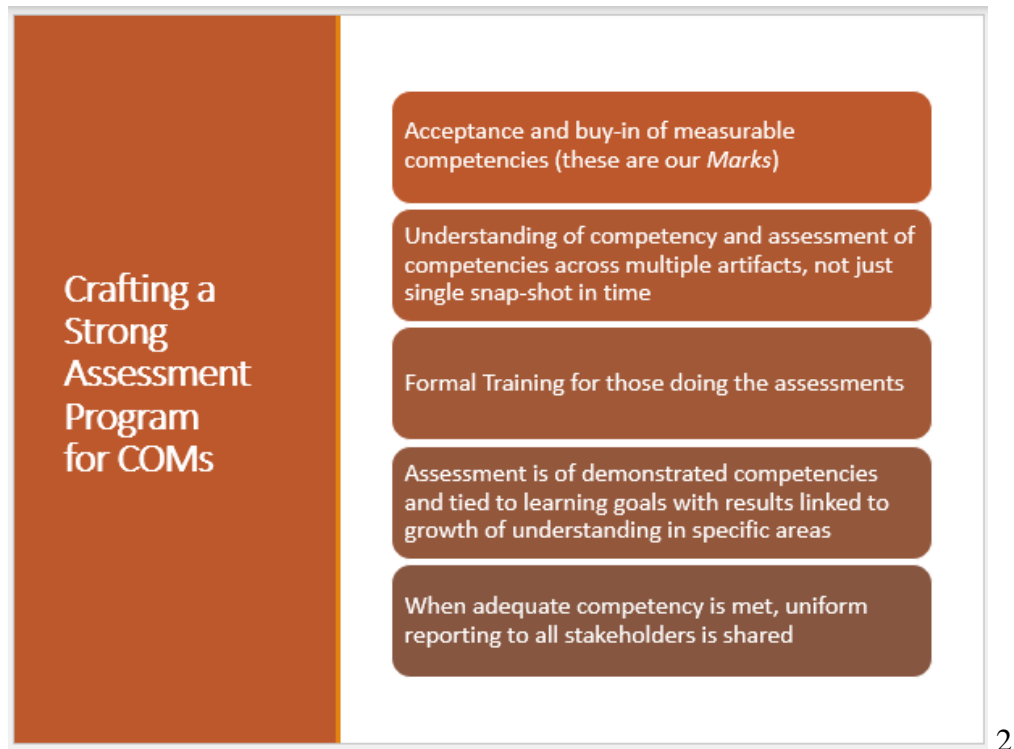
Communications must continue to be copied to COM chairs and Advisors but there may be a need for an Assessment Team member to meet with a COM or Advisor and MID to better help explain the process and the ongoing reporting. The program is still in its early stages, and it may have been ambitious on my part to think there would be enough data to report at this stage.

The work of the Assessment Team continues and a more refined training for incoming members has been developed. In July of 2021, we met on Zoom and I shared the following. I also shared this with another conference staff and their COM chairs as they seek ways to better use the *Marks* with their Members in Discernment.

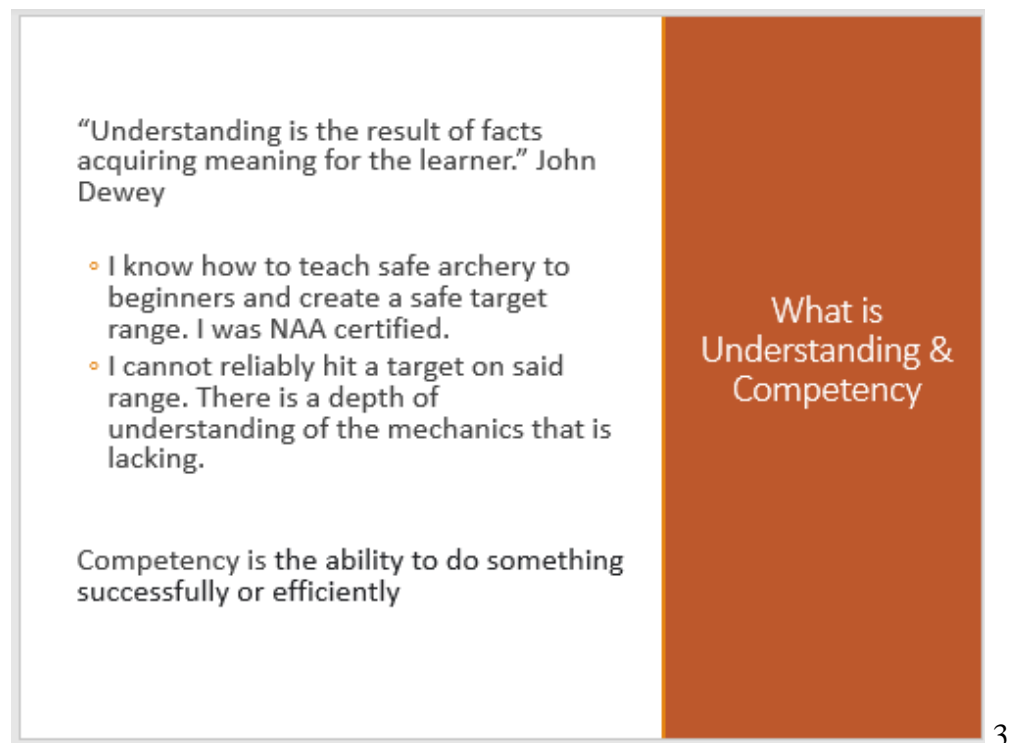
## **Training Module**



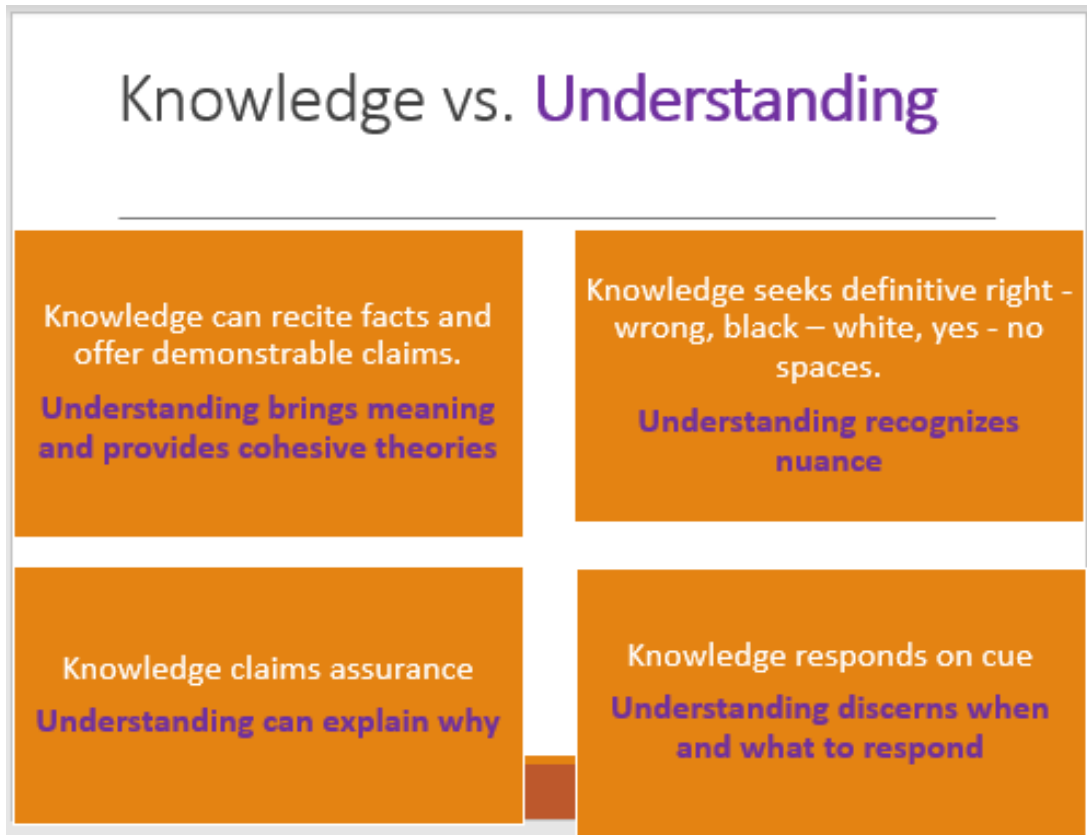
1



See notes earlier in this chapter and Appendix 1 for more on these 5 steps.



Here we spent some time thinking about other differences between knowing and understanding. We discussed how the “being able to” component is important in pastoral leadership.



4

Using John 3:16, I walked through different ways that knowledge and understanding might engage this verse. We discussed begotten, atonement, memorization, proof texting, and context.

## Understanding

Draws Inference

Transferable Big Ideas across Topics/Fields

Uncovered and Applied in Real Time/Settings

Summarizes with Generalizations

UCC *Marks* define areas where we are  
asked to measure competency,  
depth of understanding

5

I continued with the John 3:16 discussion here using examples shared with the previous slide.

- Inferences demonstrate understanding by drawing meaning from multiple specifics
- Understanding creates transferable big ideas that move across situations
- Understanding is acquired by uncovering and doing in real time
- Understanding summarizes with applicable generalizations that last over time

The *Marks* are not designed to be a check list of demonstrable gifts, but rather a full representation of competencies necessary for authorized ministry. In using a portfolio for assessment, we are measuring the competency demonstrated over a series of artifacts. These may show great passion in some *Marks* while showing limited understanding or experience in another Mark. The bare minimum is knowledge AND there is varying need for degrees of understanding across the majority of the *Marks*.



What might that look like with our John 3:16 example?

## *The Marks of Faithful & Effective Authorized Ministers in the UCC*

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These *Marks* reflect much of what the church as a whole sees as characteristic of faithful and effective ministry in these times. (from Draft 3.1)

*The Marks* are a tool for discernment and assessment.

It is **not** a checklist or report card or transcript, in which one strives to receive a perfect grade in every category.

*The Marks* are a lens for reflecting upon a person's formation, gifts and growth both before authorization **and** throughout one's ministry.

6

## *The Marks*

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Exhibits a Spiritual Foundation and Ongoing Spiritual Practice (ESFOSP)

Nurtures a UCC Identity (UCC)

Building Transformational Leadership Skills (BTLS)

Engages Sacred Stories and Traditions (ESST)

Caring for All Creation (CAC)

Participates in Theological Praxis (PTP)

Working Together for Justice and Mercy (WTJM)

Strengthening Inter- and Intra- Personal Assets (SIPPA)

7

Here is where our real work began as we brainstormed ways we might see this *Mark* demonstrated by a MID. We tried to think of artifacts that would help us see these well done and also provide opportunities to invite more growth from the candidate. This specific list may vary by region or include cultural differences. For example, in a rural area a competency in the *Marks* “Working Together for Justice and Mercy” and “Caring for All Creation” may be demonstrated through a candidate’s advocacy for legislation to help the local farmers, or support for working wages for farmworkers, or partners with local farms for gleaning programs. Demonstration of this *Mark* could look very different in an urban pastor who protests at the state capital for a \$15 minimum wage, or offers prayer at the Black Lives Matter March, or advocates for the church to help with a backpack meals program for the school across the street.

The graphic is titled "Competency Assessment" in a large, bold, orange font. Below the title are four stacked orange rounded rectangles, each containing white text. The first rectangle says "Competency based learning and assessment bundles competencies in real-world ways". The second says "Important to remember this is not the same as grading". The third says "Don't think about school and report cards". The fourth says "Think about measurement, distance, progress - Learning that happens over time with goals that are refined as learning occurs". The bottom rectangle's text is in a purple font. At the bottom of the graphic is a solid orange horizontal bar. To the right of the bar is the number 8.

## Competency Assessment

- Competency based learning and assessment bundles competencies in real-world ways
- Important to remember this is not the same as grading
- Don't think about school and report cards
- Think about measurement, distance, progress - Learning that happens over time with goals that are refined as learning occurs

8

“If employers want graduates to be competent writers, they probably do not care whether academicians have equated their proficiency to the freshman or sophomore level. They are likely to care only about the finished product of the graduates’ writing abilities.”<sup>100</sup>

#### Topical Understanding and Overarching Understanding

- Gas prices always go up in the summer – a free market economy has prices that reflect variables in supply and demand, summer demand is increased.
- John 3:16 is our foundation for substitutionary atonement – scripture in totality offers a number of atonement theories, substitution is one.
- Interpretations of the Lord’s Prayer, Statements of Faith/ Creeds, Sacraments

It is really important to stress the showcase nature of this approach – it looks at the candidate over time – this is not a single snapshot, but a photo album with captions.

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<sup>100</sup> Voorhees and Jones, “Defining and Assessing Learning,” 32-22.

## Proficiency Scale - Rubric

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**Experience** – artifact(s) demonstrates some basic experience with this Mark – limited competency in this area

**Understanding** - artifact(s) demonstrates a deep understanding of this Mark – some competency in this area

**Integration** – artifact(s) demonstrates the ability to integrate competencies across multiple *Marks* and ability to teach others

**Passion** – artifact(s) demonstrates strong passion for this Mark with competency to inspire others

9

This is the rubric that MESA provides, but as noted our Team really struggles with these four and we use “demonstrated, in process,” and “not seen.”

## Think Like an Assessor

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What evidence will show that a candidate has met proficiency in a certain Mark?

What artifacts do we need?

What does the candidate need to do in reflection on the submitted artifact?


10

Returning to some of the examples we named with the *Marks* in slide 7, we continued that discussion. What evidence will show that a candidate has met proficiency in a certain *Mark*? This may vary depending on the individual assessor. That's why the team approach is best. No one person has final say.

What artifacts do we need? We will get to this specific list on the next slide. It may vary from association to association, but it is important to seek a standard in your conference, maybe even region.

What does the candidate need to do in reflection on the submitted artifact? It's not just turning in the sermon manuscript. Each artifact must include candidate reflection that ties this specific artifact to a *Mark* or *Marks*. They should reflect on how this artifact demonstrates their knowledge, understanding or passion in relation to that *Mark*. Assessors may see things differently, but self-reflection is an important part of this process.

## What Artifacts are Needed? All must include Self-Reflection

- Official Transcripts (one time)
  - Formation experiences not recorded in a transcript
    - there may be some at with the initial submission, more will be added yearly
  - Testimonies from Ministry Witnesses (some will be once, some may offer updates)
    - Advisors/Mentors
    - Pastors/elders/deacons
    - Colleagues
    - Current/Former Congregants (be aware of boundaries)
    - Judicatory leaders
    - Community Partners
    - Supervisors
- 

11

The group brainstorming may add to this list, but in general, the initial portfolio submission may only check a few of these boxed but it will begin to form a picture of which *Marks* the candidate already has strong understanding in and which ones should be included for attention in the preparation and formation plan. A portfolio will grow and showcase a candidate's preparation, formation, and readiness for authorized ministry in and on behalf of the United Church of Christ.

All Artifact submissions, except testimonies and recommendations from others, should include the candidate self-reflection and assessment using the *Marks* and the After-Action Report questions: what did you think would happen, what did happen, what went well and why, and what can be improved and how. It is hopeful that other voices in the process are familiar with the *Marks* and use that language as well.

## Artifacts – Don't forget the self-reflection

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- Case Studies/Performance Tasks (yearly submissions)
  - 2-3 sermons yearly (including evaluations, worship materials, videos, etc.)
  - Curricular materials you have developed and taught (Bible Studies, Confirmation, Sunday School, Book Studies, etc.)
  - Newsletters, articles, publications (blogs, video logs, prezis, etc.)
  - Field Ed, CPE, Practical Ministry Evaluations
  - Programming you have developed (Outreach, Mission, Adult, Youth, etc.)
  - Evaluations from instructors, supervisors, etc.
- Psychological Evaluation (initial submission)
- UCC History and Polity final paper/project (one time)
- Final Papers from coursework as appropriate
- Ordination Paper with Statement of Faith, Theological Positions

12

## Reporting Competency

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Each artifact is used to measure competency and proficiency or need noted

Recommendations for preparation and formation are offered in writing

As more artifacts are received and acceptable proficiency in a given area is noted, the committee may stop assessing that Mark and focus on others

Once the candidate has evidenced sufficient competency across the *Marks*, an ordination paper can be prepared as final artifact

13

A Sample Report for *Engaging Sacred Stories and Traditions*

Marks	Mark Demonstrated / How Observed	Follow-Up Questions or Recommendations for Growth
Exhibiting knowledge, understanding and continuing study of the Hebrew Scriptures and the New Testament. (MESA/UCC)	DEMONSTRATED Sermons, interactions, transcript, papers	
Maturing in effective proclamation and preaching. (MESA/UCC)	DEMONSTRATED Noted growth in confidence and finding her teaching/preaching voice	
Bringing life to sacred stories and traditions in worship, proclamation and witness. (MESA/UCC)	DEMONSTRATED Bulletins, sermons, bible studies, etc.	Preaching is exceptional.
Children's Messages (from us)	IN PROCESS	Her interactions with younger children appear forced and uncomfortable, we have encouraged her to work more with this age group and to submit more artifacts so that we can discern if there is educational, or exposure needed
Sacramental Leadership (from us)	IN PROCESS Discussions exhibit academic understanding, but there is a practical knowledge and depth of understanding that is lacking	Has not yet presided, looking forward to reflections in preparation for first communion celebration as well as following; how do you talk with a family seeking baptism, who is welcome at the Table, rather than the "how to do it" pieces. Encouraged journaling about her preparation and the actual experiences, to think through discussions with parents or adults seeking baptism, and to prepare a pamphlet for parents considering baptism for their infant or for an adult that has not been baptized.
OTHER/GENERAL COMMENTS	<b>Strength:</b> Sermons are relatable.	<b>Significant Growth from Prior Feedback:</b> You have had the opportunity to preach in many settings, which has allowed you
Creativity in teaching the Bible to church Members	There is really exciting and innovative approaches to	



	scripture discussion evident in sermons and bible study lessons	to find the “teacher” voice you were hoping to achieve.
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(MESA/UCC notes these examples as coming from the *Marks* document while “ours” indicates the skill as one noted by our committee and classified as an area of competency or needed growth for this *Mark*.)

In hindsight, I wish this training included the assessment of a couple of artifacts so that groups can get a feel for how each person views the work in relationship to the *Marks*. Both times that I have done the training, time has become a real factor. I think doing practice work outside of a specific candidate’s submissions is important for group cohesion and assessment validity over time. This really needs a half-day commitment for training particular to assessment work. With the pandemic and necessity of Zoom I have offered it in a 2-hour session. It really needs to have a full four hours for people to begin to build group cohesion and understand the work of assessment. Being able to walk through this training with another conference in October of 2021 was helpful for highlighting some of the areas that are indeed transferable, as well as areas where more work needs to be done. With both presentations I saw a need to look at a few sample artifacts as a team but did not have the time to do so.

## Conclusions

This project has brought a dream into reality, but it is still a plane being built while we fly it. Twenty-one months is a great start; however, a few more years are needed to draw definitive conclusions regarding a process that has wide ranging impacts for ministerial candidates and their authorizing bodies. In conclusion, I believe Penn Central Conference has built a workable model for implementing competency-based assessment using a showcase portfolio for Members in Discernment and Committees on Ministry in the United Church of Christ. There is wide disparity across our denomination in how the *Manual on Ministry* is interpreted and applied so

no one procedure will fit across our breadth. It is important for each region or conference to discover what will work best in their setting. However, for us, portfolio assessment of ministerial candidate competencies has been best employed by a specially trained assessment team looking at candidate artifacts covering a span of time and most importantly, include the candidate's reflections incorporating the *Marks*.

It is also important to note how this work has transformed some of my own thinking about Committee on Ministry work as gatekeeping for the denomination. An embrace of competency-based assessment for ministerial candidates opens an understanding of COM ministry with candidates to way-making for authorized ministry. The committee is assessing the candidate whom God has called and finding a way to empower and authorize them for ministry within our denominational structure. There will still be instances where the answer to a given candidate is not authorization, but competency-based assessment opens the way for so many that are called to this ministry and simply needed a path that didn't include seminary.

In presenting this research and designing and employing a model for the implementation of competency-based assessment using the UCC's *Marks of Faithful and Effective Authorized Ministers*, I have followed Richard Osmer's four tasks: described what is going on, discovered why it is going on, thought about what should be going on, and designed a response. The description of what is going on in the ecclesial arena was a simpler task for me as I have done this work for almost ten years. Settling back into education language was a challenging leap as so much has changed in the years since I left the classroom. Concise, standard terminology and language are necessary for committees to bridge the gap between their transcript assessment of the academic knowledge of candidates past and the competency assessment of practical skills in candidates of today. In this project I endeavored to build a model for implementation that would

give assessors the tools necessary to do this work without setting them adrift in a sea of education research. Using the eight competency areas of the *Marks* invites candidates and assessors to frame artifacts in ministry terms even if the learning was in a different professional field. The training module ideally presents enough educational language to equip assessors to bridge that difference.

Things continue to go well for the assessment team as we refine the artifacts needed from candidates. We keep trying to hone the communications between our team and association Committees on Ministry. One COM chair noted there is a feeling of being left out of the process but knows the COM was not involved in grading papers for seminarians either.<sup>101</sup> The right amount and type of communication is the current focus for making our process the best it can be as we bridge from assessing class credits on transcripts to measuring practical skills as demonstrated by showcase portfolios submitted by our Members in Discernment.

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<sup>101</sup> Conversation with author regarding effectiveness of the assessment team model.

## Chapter 5: Next Steps

Recalling Richard Osmer's four tasks of practical theology, this project has worked through each one. In chapter 1, my research question asked how, in the face of historic resistance, UCC Committees on Ministry (COMs) might embrace and implement competency-based assessment using *The Marks of Faithful and Effective Authorized Ministers* in discerning preparedness and readiness for authorized ministry in our Members in Discernment. As I worked through the literature and observed the current state of the field, I accomplished reviewing Osmer's first tasks of describing what is going on and why. Moving into the tasks of what should be going on and developing a response, Chapters 3 and 4 presented a resounding "yes!" to the research question and offered one possible way forward. The implementation model that we used in Penn Central is still in its toddler years but does show a working model. I have explained how competency-based assessment can be used to expand our denomination's understanding of learnedness and continue to meet the needs of our local congregations. I believe competency-based assessment sets the stage for authorized ministers to recognize the need for continual growth using the *Marks* to craft their career path, so one that is ordained to ministry in small-town, rural North Carolina can engage learning opportunities throughout her ministry that prepares her for ministry in other settings of the church. I also affirm the possibility that other denominations can use competency-based assessment in their work with ministerial candidates.

The literature review presented in Chapter 2 highlighted several books and articles that would be helpful reading for those who staff committees doing this work. *Understanding by Design*<sup>102</sup> would be a great addition to the library of anyone that serves on committees that do

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<sup>102</sup> Grant Wiggins and Jay McTighe, *Understanding by Design, Expanded 2<sup>nd</sup> Edition* (Alexandria, VA: Association for Supervision and Curriculum Development, 2005).

assessment work with candidates. However as noted in the first principle I offer for developing an assessment program using competency-based assessment, the competencies must be agreed upon and accepted as the necessary competencies for the field. The UCC is making progress on this but there is more work to be done in teaching the *Marks* and training committees in their application. This consensus around the competencies can be found when focusing on the eight competency headings of the *Marks*. These eight may be applicable across generations of those called to serve the church.

Chapter 3 sketched a history of how the field of education has arrived at the validity of competency-based education. Using the National Postsecondary Education Cooperative's institutional guidelines for creating a competency-based assessment program, I offered five principles developed to guide and implement our work in Penn Central. The first, mentioned above, is broad acceptance of the *Marks* as the competencies needed for authorized ministry. This must be partnered with formal training for those doing the assessment work. Without acceptance of the *Marks*, nothing moves forward. And as I have noted, I think the broad acceptance can be found in the eight competency categories. Both wide acceptance and formal training are essential in the building of a program with the latter able to support greater understanding of the *Marks* once embraced by committees.

Penn Central Conference put my concept and principles into action, as described in Chapter 4. A working group helped determine an assessment team who would do this work. Then the working group helped to recruit members for the assessment team. That team collaborated with me to craft a working model that embraces the *Marks* and creates feedback for each candidate based on their work products that we collected in showcase portfolios. An important learning for the team and me was the need for candidate reflection on more of their

artifacts than just the case studies. This addition has helped us see and assess the full candidate more completely.

The UCC affirms that God calls each of us and sets aside some for ordained ministry.<sup>103</sup> I developed a pamphlet<sup>104</sup> several years ago for those feeling called to help them discern if their call was indeed to ordination. A second brochure<sup>105</sup> for their local church pastor encourages deep discussion around the setting aside of the Levites in Numbers chapter 8 and preparing them for their priestly work. Inviting deep reflection with the potential Member in Discernment is an early opportunity to see competencies in *Engaging Sacred Stories and Traditions* as well as *Exhibiting a Spiritual Foundation and Ongoing Practice*. Engaging ancient rites and rituals alongside our current practices around ordination is a great first step in the formal preparation and formation for authorization. Once a local church member, in conversation with their local church pastor, has discerned their calling is to ordained ministry, the relationship with a Committee on Ministry can begin for their formal assessment. This project offers one path for that assessment work using competency-based assessment and the *Marks*.

This project does not address distinctions between specific need differentials of large and small churches or those of urban and rural settings. In the United Church of Christ, Committees on Ministry are empowered to assess readiness for ordination in and on behalf of the entire denomination. Inside each of those committees conversations around this difference in competency needs must be addressed. Candidates do need to understand the depth and breadth of the whole denomination, a competency named in the *Mark*, *UCC Identity for Ministry*, but may

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<sup>103</sup> MESA, *Manual on Ministry*, 7-11.

<sup>104</sup> See Appendix 4

<sup>105</sup> Also in Appendix 4

not at the time of ordination have the ability to fully integrate that understanding into practical ministry.

There are many open doors that I did not enter in this project. The most compelling one is the ordination paper. The 1963 version of *The Manual on the Ministry in the United Church of Christ* lists as one of the requirements an “ordination paper of from 3,000 to 3,500 words setting forth his Christian experience, call to the ministry, and an outline of his theological position.”<sup>106</sup> The paper should follow a specified outline and be read to the COM or Ordaining Council. The outline is very similar to the one that we provide Members in Discernment in Penn Central Conference still today.<sup>107</sup>

The similarity to the requirements from over 60 years is an indication in and of itself that this part of a candidate’s portfolio needs attention. More importantly though, I posit that if the portfolio works as a tool for assessing a candidate’s competencies for ministry, this academic paper is no longer the appropriate capstone. I look forward to working with my Assessment Team and Committees on Ministry to discern exactly what type of capstone project might be most fitting for our region. This is work that is down the road and may be regionally specific.

Here in Penn Central we still have a few issues to work out in our implementation, not the least of which is stronger ties and communication with the Association COMs. We also have not discussed the storage of portfolios that are not on Google Drive. We recognize not all candidates will use this technology-friendly approach and will use a large binder to house their

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<sup>106</sup> Committee on Pastoral Relations, *The Manual on the Ministry in the United Church of Christ* (New York: Council for Church and Ministry, 1963), 22.

<sup>107</sup> Both outlines can be found in Appendix 5.

materials. I don't see a need for these to be stored by the Association as part of the minister's file; however, the assessment reports should likely be kept.

Also important to note is that the new *Manual* pushes committees and candidates to form Discernment Committees at their local church. There is a resource available for training local church committees willing to journey more closely with their Member in Discernment. However, to date only a few of the candidates in Penn Central have developed this group and only one MID working with our assessment team has reached out to have that committee trained. Along with our committee communications, we will also work on developing these committees for more of our MIDs.

I believe this type of candidate assessment could be used in other denominations provided there is work on defining the competencies therein and a broad acceptance found. I think this is still a work in progress for the UCC. The *Marks* are widely known, but not widely accepted or embraced. If a denomination is starting a competency-based assessment program, wide-spread buy-in is necessary. Following the five steps that guided me may help in this development.

I also see some applicability for seminaries, especially those with close denominational ties, to develop learning goals for courses that connect explicitly to the *Marks*.<sup>108</sup> For institutions considering competency-based assessment, the National Postsecondary Education Cooperative's report on Competency-Based Initiatives is a must-read. Sioux Falls Seminary has developed the Kairos Project creating "new opportunities for integrating competency-based

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<sup>108</sup> A number of the regional theological training programs have also done this. Pathways in Southeast Conference ties all courses to the *Marks*.



theological education, experiential learning, and traditional learning experiences.”<sup>109</sup> A few seminaries have joined this project and I am excited to see how it progresses having just launched in 2021.

In response to my research question, “*how can the UCC embrace and implement competency-based assessment to evaluate preparedness for authorized ministry?*” this research, following Osmer’s four tasks of practical theology, developed one successful model. Regardless of how a group chooses to move forward with competency-based assessment of ministerial candidates for authorization, this broad approach to preparation and formation is a viable one that can meet the needs of both the local church and denominations. The eight *Marks* are a great fit for applying competency-based assessment. Assessors can get weighed down when working with the full list of forty-eight. These eight *Marks* are flexible enough to guide the preparation and formation of candidates for authorized ministry in the United Church of Christ as we continue to live into the new *Manual on Ministry*. These eight are well defined and cover much of the depth and breadth of vocational ministry. Stressing the eight over the forty-eight encourages wider embrace and understanding of these competencies across the denomination. And lifting up the eight in this way potentially invites a longer life for the *Marks*.

As the United Church of Christ continues to evolve there may be occasions for revisiting the *Marks* to ascertain their continued viability and fit for the denomination’s authorization process. Since the *Marks* are still relatively new, I believe that they have not yet reached their maximum potential for implementation. Further, specific ways of exhibiting a competency may change over time while the core competency remains the same. Perspectives will shift, yet the

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<sup>109</sup> “kairos,” Sioux Falls Seminary, accessed June 17, 2021, [www.sfseminary.edu/kairos](http://www.sfseminary.edu/kairos) Sioux Falls has since launched a combination legacy with other schools, Kairos University. The referenced page is no longer available.

goal is for the *Marks* to be a living document that can guide clear assessment of ministerial candidates for a long time to come.

## Appendix 1 – Principles of Strong Practice<sup>110</sup>

Principle #1: A senior academic administrator becomes the public advocate, leader, and facilitator for creating an institutional culture that is open to change, willing to take risks, and fosters innovations by providing real incentives for participants.

*MESA worked for years to craft our current set of Marks and has supported them strongly with educational opportunities for Committees on Ministry. I am not certain that the denomination had a culture that was really as open to this change as the General Synod Pronouncement.*

### The Planning Process: Strong Principles for Faculty and Staff

Principle #2: The appropriate stakeholders fully participate in identifying, defining, and reaching a consensus about important competencies.

Principle #3: Competencies are defined at a sufficient level of specificity that they can be assessed.

Principle #4: Competencies are clearly defined, understood and accepted by relevant stakeholders.

*All three of these combine for my first point, Large Scale Acceptance of the Marks as **Our** Competencies. MESA worked with representative groups from across the church and Committees on Ministry to develop the initial Marks as well as our current list. However, there is not widespread acceptance of them as **our** competencies. There are varying degrees of understanding of the Marks themselves as the competencies needed for authorized ministry. There is a need for deep discussion with committee members to get to a place of common understanding and acceptance of the Marks as valid and needed competencies for ministry. Our list of 48 is so specific that committee members tend to see it as a checklist and not simply as possibilities for how any one or more of the eight Marks might be demonstrated.*

*It is also important for already authorized clergy, as relevant stakeholders, to understand the Marks because this is the way the church is assessing their future ministerial*

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<sup>110</sup> Voorhees and Jones, “Defining and Assessing Learning.” The list of 12 and the headings are directly from their report. The italicized text is personal insight.

*colleagues. It is also a place for authorized ministers to examine their own growing edges as lifelong learners.*

### **Selecting Assessment Methods: Strong Principles for Academic Leaders**

Principle #5: Multiple assessments of competencies provide useful and meaningful information that is relevant to decision-making or policy-development context.

*This principle informed my second point, General Understanding of Competency-Based Assessment and a willingness to engage it. While academic leaders are going to already understand what is meant by competency assessment, our committee members do not have the same starting place, our volunteers will need to first learn about competency-based assessment and then how to apply it. Portfolios allow for a number of artifacts, demonstrating single or multiple Marks, so the committee can see and assess their work and growth over time, rather than as a single snapshot in time.*

Principle #6: Faculty and Staff fully participate in reviewing and making decisions about the strongest assessment instruments that will measure their specific competencies.

*While not highlighted as a guiding principle for this project, the specific items and total number of artifacts needed for the portfolio may shift over time and vary depending on the candidate.*

### **Dealing with Data Ramifications: Strong Principle for Faculty and Staff**

Principle #7: The precision, reliability, validity, credibility, and costs are all considered and examined in making selections about the best commercially developed assessments and/or locally developed approaches.

*The supporting details offered by the Cooperative in explanation of this principle informed my third principle, Formal Training for Those Doing the Assessment Work. “They then spent considerable time training all raters. Initially, all raters reviewed the same two or three different samples of student work and then determined how close their ratings were to each other’s scores. When there were major disagreements in ratings, they discussed their reasons for assessing student work in a certain way.”<sup>111</sup>*

*As I noted above, we have a committee of volunteers, some laity and some clergy, who need to understand artifacts and competency-based before assessing for the Marks. This training will need to be tailored in each setting, but a sample was included.*

### **Linking Competencies Across the Institution: Strong Principles for Academic Leaders, Faculty, and Staff**

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<sup>111</sup> Voorhees and Jones, “Defining and Assessing Learning,” 27.

Principle #8: The competency-based educational initiative is embedded within a larger institutional planning process.

Principle #9: The assessments of competencies are directly linked with the goals of the learning experience. For example, assessments processes are designed to measure the intended outcomes of the course or major.

*In my own principle 4, I note that there should be recognition that all assessment done by the committee is of demonstrated competency and tied to learning goals of competency growth in specific Marks. A Marks Portfolio should not be a capstone or snapshot, it needs to happen across the duration of the MID experience and should be directly connected to the work of authorized ministry.*

### **Reviewing Assessment Results: Strong Principles for Academic Leaders, Faculty, and Staff**

Principle #10: The assessment results are used in making critical decisions about strategies to improve student learning or allocation of resources.

Principle #11: The assessment results are clear and reported in a meaningful way so that all relevant stakeholders fully understand the results.

Principle #12: The institution experiments with new ways to document students' mastery of competencies that supplement the traditional transcript.

*Reporting is still a work in progress for the assessment team in Penn Central. We have tried a couple of different methods and continue to hone this aspect of the work. It is important to include information that is relevant to the candidate, their advisor, and their formation plan. The assessment results must be clear for the candidate's committee to make decisions about a candidate's continued journey to authorization.*

## **Appendix 2 – The Marks of Faithful and Effective Authorized Ministers in the United Church of Christ<sup>112</sup>**

### **EXHIBITING A SPIRITUAL FOUNDATION AND ONGOING SPIRITUAL PRACTICE**

- Loving God, following Jesus Christ, and being guided by the Holy Spirit; living a life of discipleship.
- Praying actively and nurturing spiritual practices.
- Being called to ordained ministry by God and the Church.
- Continuing discernment of one's call in community.
- Understanding the power of the Holy Spirit at work through the elements of Christian worship to nurture faith.
- Exhibiting a commitment to lifelong spiritual development and faithful personal stewardship.

### **NURTURING UCC IDENTITY**

- Acknowledging Jesus Christ as the sole Head of the Church.
- Communicating passion for the oneness of the Body of Christ (John 17:21).
- Holding active membership in a Local Church of the United Church of Christ.
- Participating in the various settings of the United Church of Christ, including Local Churches, Associations, Conferences, General Synod, and global ministries.
- Knowing and appreciating UCC history, polity, and theology.
- Exhibiting a commitment to the core values of the United Church of Christ: continuing testament, extravagant welcome, and changing lives.

### **BUILDING TRANSFORMATIONAL LEADERSHIP SKILLS**

- Empowering the Church to be faithful to God's call, reflective of Christ's mission, and open to the surprises of the Holy Spirit.
- Strategically creating the future of God's Church.
- Witnessing in the public square to God's redeeming power.
- Performing necessary and appropriate administrative tasks.
- Working collaboratively with intercultural awareness and sensitivity.
- Encouraging leadership development of self and others through continuing education and lifelong learning.

### **ENGAGING SACRED STORIES AND TRADITIONS**

- Exhibiting knowledge, understanding, and continuing study of the Hebrew Scriptures and the New Testament.
- Maturing in effective proclamation and preaching.
- Understanding the history of the Christian Church, from biblical times forward.
- Bringing life to sacred stories and traditions in worship, proclamation, and witness.
- Leading faith formation effectively across generations.
- Holding the Holy with integrity especially as represented in the Sacraments.

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<sup>112</sup> MESA, *Manual on Ministry*, 10-15.

## CARING FOR ALL CREATION

- Nurturing care and compassion for God's creation.
- Maintaining a basic understanding of mental health and wellness.
- Practicing self-care and life balance.
- Providing hope and healing to a hurting world.
- Attending to one's own spiritual and pastoral care, including engagement in supervision as appropriate.
- Stewarding the resources of the Church.

## PARTICIPATING IN THEOLOGICAL PRAXIS

- Practicing theological reflection and engagement as part of one's sense of ministerial identity.
- Integrating theological reflection in teaching, preaching, and ecclesial and community leadership.
- Articulating a theology and practice of ministry consistent with the UCC Manual on Ministry.
- Demonstrating an appreciation for and participation in the ecumenical and interfaith partnerships of the UCC.
- Experiencing and appreciating a variety of theological perspectives.
- Embodying the UCC Ministerial Code.

## WORKING TOGETHER FOR JUSTICE AND MERCY

- Drawing on the ministry of Jesus Christ to confront injustice and oppression.
- Practicing the radical hospitality of God.
- Identifying and working to overcome explicit and implicit bias in the life of the Church.
- Understanding community context and navigating change with a community.
- Engaging in mission and outreach.
- Building relationships of mutual trust and interdependence.

## STRENGTHENING INTER- AND INTRA- PERSONAL ASSETS

- Developing and maintaining a healthy sense of self as shaped by God, community, and life experiences.
- Living in relationships of covenantal accountability with God and the Church.
- Exhibiting strong moral character and personal integrity.
- Respecting the dignity of all God's people.
- Understanding and ministering to stages of human development across the life span.
- Demonstrating excellent communication skills.

## Appendix 3 – The Showcase Portfolio

1. Complete the General Information page.
2. Gather information on each of your previous educational and/or formational experiences. Transcripts where applicable. Use the attached form for non-transcript educational or formational experiences that were formative or preparatory for vocational ministry.
3. For life or previous work experiences that are subjective in nature, please submit a letter, as appropriate, from *any* of the following who have strong knowledge of your strengths and growing edges related to ***ministry and your demonstration of the Marks for Faithful and Effective Ministry***:
  - Pastors, elders/deacons of congregations you have served,
  - colleagues,
  - current or past congregants,
  - judicatory leaders,
  - current personal or community relationships,
  - supervisors, mentors
4. For ministerial experiences, please submit any materials that would demonstrate your strengths or visible growth related to your ***practice of the Marks for Faithful and Effective Ministry*** (noting the Mark(s) addressed by each), such as:
  - Examples of sermons preached, worship materials you have developed,
  - curricular materials you have created for courses you have taught,
  - newsletters or other publications you have written,
  - field education evaluations (at least 1 field ed should be outside your home congregation)
  - programs you have developed
  - evaluations from supervisors
5. Complete a psychological evaluation with Samaritan Counseling Center in Lancaster.
6. Upon completion of an approved UCC History and Polity Course, your final paper should be submitted for inclusion in this portfolio.
7. Please submit any additional materials from outside your ministerial practice that you feel are relevant to your preparation for authorized ministry.

**Your portfolio is a living document that grows with you as you prepare for Authorized Ministry. Your first compilation of documentation is due within 4 months of your acceptance as a MID. Updates are due yearly following. Updates include, but are not limited to: transcripts, workshop updates, CPE evaluations, internship evaluations, MID committee letters, additional Marks case studies, Self-Assessments on personal professional and theological reflections and Advisor letters, etc. The capstone for your portfolio is completion of an ordination paper and the Ministerial Profile, including the Oxford Criminal Background Check, as you prepare for ordination.**

## EMPLOYMENT HISTORY

On a separate sheet, list employment history from most current moving in reverse chronological order; noting your position, company/location, address, dates, and duties – highlighting those you feel inform your call and practice of ministry. (an annotated resume)

## CONTINUING TO SHARE YOUR JOURNEY

1. Name 2-3 meaningful traditions of your local church(es). Describe how and why you find them meaningful. (Marks Possibilities: SFMOSP, UCC, ESST, PTP)
2. How long have you been a part of the United Church of Christ? Please share with the committee how you came to be a UCC-er and what it is about our denomination that calls to you. Share with us one example of how your ministry demonstrates each of the core values of our denomination. (UCC, ESST, WTJM)
3. Define covenant and discernment as you understand them personally, theologically and within the wider church. (UCC, ESST, PTP)

## DOCUMENTATION OF MINISTERIAL EDUCATIONAL/FORMATIONAL EXPERIENCES

(for those not reflected on any transcripts, use a separate sheet for each)

Name of Educational/Formational Experience \_\_\_\_\_

\_\_\_\_\_

Offered by (sponsoring organization) \_\_\_\_\_

\_\_\_\_\_

Website (if any) \_\_\_\_\_

Dates taken \_\_\_\_\_

Instructor (s) Name (s) \_\_\_\_\_

Location of Experience (city/state) \_\_\_\_\_

Certification \_\_\_\_Y \_\_\_\_N (if yes, please attach copy of certificate)

Contact hours (face-to-face) \_\_\_\_\_ Credits/CEUs \_\_\_\_\_

.....

**Please complete the following questions to the best of your recollection.**



- Please describe the content covered including any books read. What are the top 5 learnings or growth points from this experience?
  - Offer a narrative of an experience or a product (lesson, sermon, video) where you integrated learnings from this course or formational experience.
- Please note the Marks of Ministry that you feel were honed or developed by this experience in detail.

### **Additional Comments**

### **ARTIFACT COLLECTION**

Using the Marks of Faithful and Effective Authorized Ministers of the United Church of Christ capture learning experiences in case study format or demonstrated through an artifact, art work, vlog series, etc for 4 of the Marks categories. The lists of sub-marks under each category may help you brainstorm personal experiences. Share with the committee if you feel this experience integrated multiple Marks and/or how the lived experience helped to shape your practice of ministry. In this initial round of collection, please be sure to note areas of potential growth or areas where you have shown growth in your understanding and ministry.

Include a narrative reflection to address the following:

- What did you expect to occur?
- What did happen?
- What went really well? Why did you think this was the case?
- What can you learn from this experience? Did this experience highlight a need for further learning? How might you seek that out?

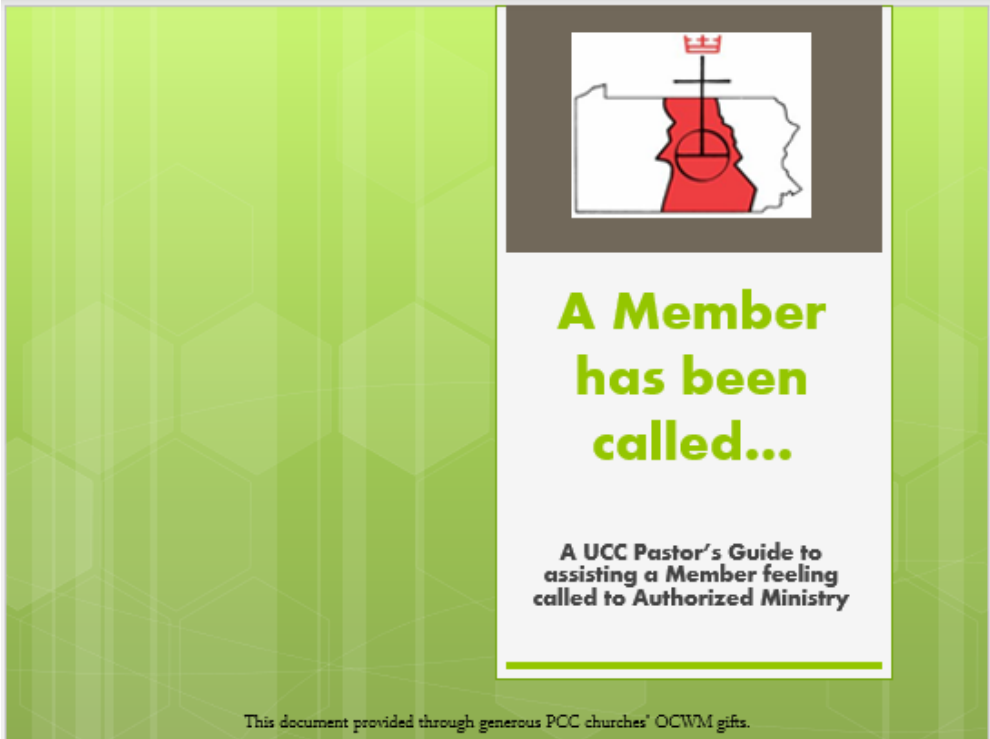
**Follow this reflection pattern for all artifact submissions.**

**Licensed pastors** completing this portfolio as part of the discernment process for ordination should include case studies across all eight Marks headings.

The Marks can and should overlap in your practice of ministry. These artifacts and case studies are designed to include a narrative display of your engagement of them. Chose the Mark you think your experience most highlights as the central focus but be sure to note other Marks you feel are exhibited or could have been.

## Appendix 4 – Resources for a local church pastor and their church member who is feeling called to authorized ministry

### For the Local Church Pastor

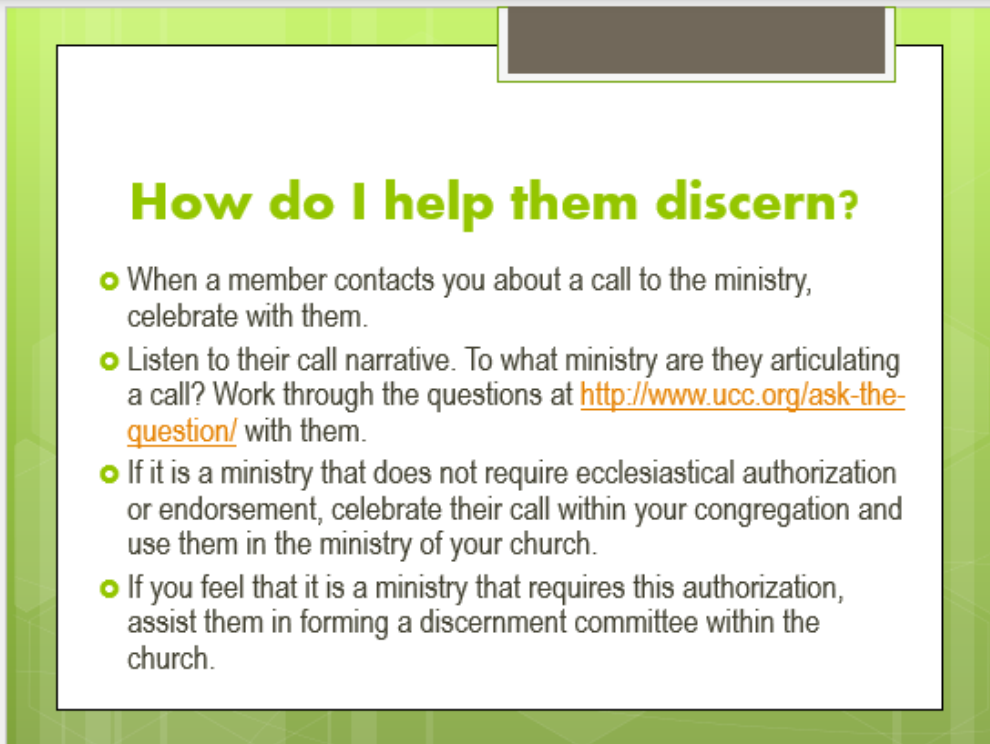


**A Member has been called...**

A UCC Pastor's Guide to assisting a Member feeling called to Authorized Ministry

This document provided through generous PCC churches' OCWM gifts.

1



**How do I help them discern?**

- When a member contacts you about a call to the ministry, celebrate with them.
- Listen to their call narrative. To what ministry are they articulating a call? Work through the questions at <http://www.ucc.org/ask-the-question/> with them.
- If it is a ministry that does not require ecclesiastical authorization or endorsement, celebrate their call within your congregation and use them in the ministry of your church.
- If you feel that it is a ministry that requires this authorization, assist them in forming a discernment committee within the church.

2

## But what is a discernment committee?

- This is a group that will meet regularly with the candidate and discuss the UCC's Marks for Faithful and Effective Ministry (available from Conference office or [www.ucc.org/ministers\\_marks](http://www.ucc.org/ministers_marks)) with the candidate.\* (see note on last page)
- They will talk about the call narrative with the candidate and the ministry to which the candidate feels called.
- They will discuss the educational needs of the candidate. (The Marks document helps here, too.)
- They will read Numbers 8 (*The Message*) and affirm that this candidate is called and set aside for authorized ministry that needs training, preparation and authorization from beyond the local church.

\* The Lord said to Moses: \*Take the Levites from among all the Israelites and make them ceremonially clean. (Num 8)

3

This local church committee has taken shape for some MID's but is a challenge for others. In some cases, the local church pastor becomes this discernment partner.

<sup>14</sup> Have the Levites stand in front of Aaron and his sons and then present them as a wave offering to the Lord.<sup>14</sup> In this way you are to set the Levites apart from the other Israelites, and the Levites will be mine. (Num 8)

## If authorization is needed...

- You and the candidate should contact your Association Committee on Ministry (COM) Chair to discuss the requirements for applying as a Member in Discernment (MID).
- You and the discernment committee will be asked to write letters of recommendation.
- You and a member of the discernment committee should plan to attend the Committee on Ministry Interview with the candidate.

4

\*Bring the Levites to the front of the tent of meeting and assemble the whole Israelite community. (Num 8)

## Yes, Authorization

- The church will be an integral partner on this journey of discernment.
  - There are spiritual covenants: prayer support, encouragement, space to work through challenges
  - There are Human Resource covenants: a small discernment committee to sojourn with the candidate, opportunities to preach and teach
  - There are financial covenants: psychological evaluation, criminal background checks, education assistance

5

## No, Authorization

- It is entirely possible that after this initial period of discernment with the candidate that you or the committee may recognize that the candidate's call is to ministry within your congregation and does not need further authorization from the wider church.
- If this is the case, celebrate their call with them and affirm their call, gifts and graces through use in the ministry of your church.

6

## Remember Baptism

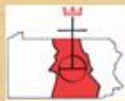
- In the UCC, we believe that all members, by virtue of baptism, are called to be ministers in the **priesthood of all believers**.
- Some however, are called out and set aside for authorized ministry: ordained, licensed and commissioned.
- Scripturally, these require something beyond what the local church can give (Numbers 8, *The Message*).

7

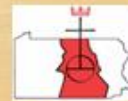
### For Those Feeling Called

I have heard God  
calling...

And Here I am...  
Now what?



This document provided through generous PCC churches' OCWM gifts.



1

<sup>14</sup> Have the Levites stand in front of Aaron and his sons and then present them as a wave offering to the LORD.<sup>14</sup> In this way you are to set the Levites apart from the other Israelites, and the Levites will be mine. (Num 8)

## You feel called into ministry, do you need UCC authorization?

- In the UCC, all members are called to ministry by nature of their baptism into the priesthood of all believers.
- Some are set aside for authorized ministry.
- Read Numbers 8 (*The Message*). Scripturally, those set aside for authorized ministry have rituals, processes and formation by which they fulfill their calling.
- The UCC is no different. Answering your call in the UCC, includes processes, formations and rituals that must be followed.

2

## Beginning the Authorization Journey

- Your journey will start with your **local church pastor**. Go to them.
  - Articulate your call to them. They will begin to help determine if you need ecclesiastical authorization. Your call may be to serve in a variety of roles at the local church that do not require authorization beyond that of your pastor and local church.
- If necessary, they will assist you in forming a **discernment committee** of fellow church members that will also help in continuing to discern both your call and your gifts and graces for ministry.
  - This committee will walk with you through your authorization journey if you, your pastor and they discern that authorization is needed for the ministry to which you are called.

3

\* The LORD said to Moses: \* Take the Levites from among all the Israelites and make them ceremonially clean. (Num 8)

## I'm Ready for Formal Discernment

- You and your pastor will contact your Association Committee on Ministry (COM) Chair to request a meeting time with your local Committee on Ministry.
- There will be a number of application items that are required from you prior to that meeting:
  1. A paper outlining your spiritual journey to this place in your life as well as an articulation of your call, your current understanding of the United Church of Christ and the education and training plan that you anticipate completing.
  2. Documentation of Adult Education (official transcripts).
  3. Letters of Recommendation: one from your pastor, one from your discernment committee, and two-three others.
  4. Each Association has a few additional requirements so it will be important for you to contact your association office early in your preparation.

## Appendix 5 – Ordination Paper Outlines

### Ordination Paper Outline (1963)<sup>113</sup>

- A. Statement of Christian Experience
  - 1. Home and local church
  - 2. Education
  - 3. Call to Ministry
- B. Statement of Christian Beliefs
  - 1. God, Jesus Christ, the Holy Spirit
    - a. Creation and Providence; Judgement and Grace
    - b. Person of Christ: Incarnation, Atonement (problem of evil), Resurrection
    - c. Revelation and the Holy Scriptures
  - 2. Man
    - a. Sin, Repentance, Forgiveness
    - b. Prayer
    - c. Eternal Life
  - 3. The Church and the Kingdom
    - a. Doctrine of history and the second coming
    - b. Church and the world (inc. evangelism, social action, missions)
    - c. My denomination and the Church
    - d. Baptism and the Lord's Supper
    - e. The Ministry
- C. Summary and Conclusion

### Ordination Paper Outline (used today in Penn Central Conference)<sup>114</sup>

The paper should be 15-20 pages of typed, doubled spaced, 12pt font, work with 1" margins including name and page numbers on each page along with works cited page.

**Part I. *Spiritual Foundation for Ministry*** – (The first section of the *Marks of Faithful and Effective Authorized Ministers of the United Church of Christ, Exhibiting a Spiritual Foundation and Ongoing Practice*, may help frame this section.)

- A. Home and local church experience
- B. Educational experiences
- C. Your understanding of your Call to Ministry
- D. Personal growth during the preparation for ministry

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<sup>113</sup> Commission on Church and Ministry, *A Syllabus on the Polity, Life and Work of the United Church of Christ* (New York: Commission on Church and Ministry, 1960) 14.

<sup>114</sup> This outline was last updated in 2018 to include reference to the *Marks*. It is housed on the Google Drive for the PCC Committees on Ministry.



E. Your understanding of ordained ministry in the United Church of Christ

**Part II. *Personal Theological Statement*** – Explain how the teachings and traditions of the Church relate to your own theological perspective. (Several of the sections of the *Marks* may help frame this portion of your paper.) Topics might include but are not limited to:

A. God

- The Creator and creation, providence, justice and grace
- The Holy Spirit
- The person and work of Jesus Christ
- Divine revelation and the Holy Scriptures

B. Humanity

- Your understanding of the nature of evil, sin, repentance, and forgiveness
- The importance of prayer and reflection
- Your understanding of redemption and the promise of eternal life

C. The Church and discipleship

- Your understanding of the promised Reign of God
- The Church in the world - Evangelism, social action, mission
- Your understanding of the Sacraments (Baptism, Communion)

**Part III. *Concluding Remarks from the Candidate***

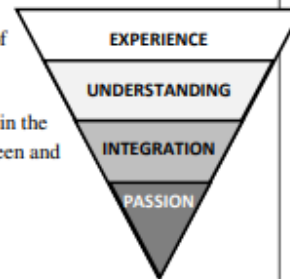
## Appendix 6 – Rubric Example from MESA<sup>115</sup>

### NURTURING UCC IDENTITY

#### Acknowledging Jesus Christ as the sole Head of the Church.

*In assessment of this Mark, you might consider how the individual:*

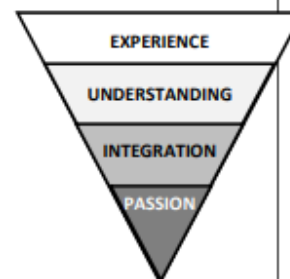
- Orders one's life and ministry in relation to Jesus Christ's role as sole head of the Church.
- Is faithful to Christ's presence and mission in the world.
- Articulates an understanding of the Church that is faithful to God's mission in the world and open to the guidance of the Holy Spirit, both as the Church has been and is becoming.
- Teaches others the implications of Christ's role as head of the Church.
- 
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#### Communicating passion for the oneness of the Body of Christ (John 17:21).

*In assessment of this Mark, you might consider how the individual:*

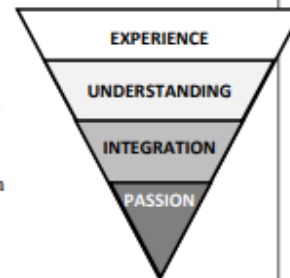
- Describes, appreciates and participates in the ecumenical relationships of the United Church of Christ.
- Welcomes and affirms diverse voices within the UCC, including those with whom the individual disagrees or has no experience.
- Leads others in ministries that cross boundaries of difference.
- Communicates a vision of and advocates for a multiracial Body of Christ.
- 
- 
- 



#### Holding active membership in a Local Church of the United Church of Christ.

*In assessment of this Mark, you might consider how the individual:*

- Maintains a covenantal relationship, as a baptized disciple of Christ, with a particular local congregation of the United Church of Christ.
- Exercises leadership in the local and wider church, in a variety of traditional and emerging settings.
- Mentors others in their relationship with the local church.
- Represents the United Church of Christ as the denomination of one's heart in its local expression.
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- 



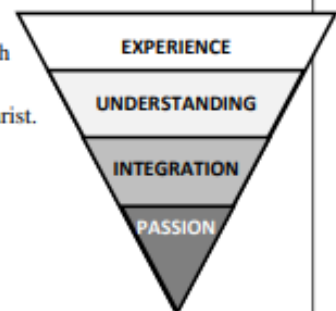
<sup>115</sup> "The Marks Rubric." Free PDF download from UCC Resources accessed December 21, 2021.  
[https://www.uccresources.com/products/the-marks-rubric?\\_pos=1&\\_sid=2f8b244b1&\\_ss=r&variant=35848196495](https://www.uccresources.com/products/the-marks-rubric?_pos=1&_sid=2f8b244b1&_ss=r&variant=35848196495)

## NURTURING UCC IDENTITY

### Participating in the various settings of the United Church of Christ, including Associations, Conferences, General Synod, and global ministries.

*In assessment of this Mark, you might consider how the individual:*

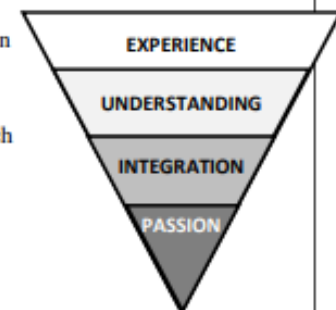
- Understands the covenantal relationship of each setting of the United Church of Christ (Local Church, Association, Conference, and General Synod).
- Ministers in and appreciates the various settings of the United Church of Christ.
- Encourages participation in and financial support of the wider church.
- Teaches others how the various settings of the church relate to one another covenantally.
- 
- 



### Knowing and appreciating UCC history, polity, and theology.

*In assessment of this Mark, you might consider how the individual:*

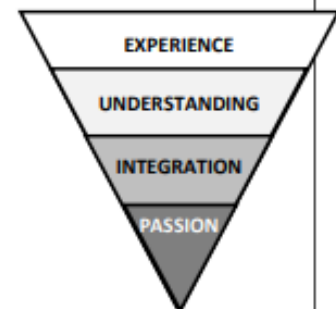
- Articulates the diverse histories that comprise the UCC, both in its formation and ongoing development.
- Places one's own journey of faith within these contexts.
- Describes and appreciates the structure and governance of the United Church of Christ.
- Teaches others about the history, polity, theology and witness of the UCC.
- 
- 
- 



### Exhibiting a commitment to the core values of the United Church of Christ: continuing testament, extravagant welcome, and changing lives.

*In assessment of this Mark, you might consider how the individual:*

- Understands the core values of the United Church of Christ.
- Incorporates these values into one's ministry.
- Leads others in reflecting on and living out the mission, vision and purpose of the United Church of Christ.
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