

# Ministerial Assessment Specialist Guidelines

Minimum Standards for Ministerial Assessment Specialists.....	2
The BOM-MAS Partnership .....	4
Selecting Psychological Assessments .....	5
Recommended Psychological Assessment Tools .....	8
Recommended Clinical Instruments .....	8
Recommended Normal Personality Instruments.....	9
The Psychological Assessment Process.....	10
Certification of Candidacy and/or Request For License as Local Pastor .....	10
Application for Provisional Membership .....	10
Application for Ordination and Full Membership .....	11
The Decision-making Process .....	11
Psychological Assessment Retention Guidelines .....	12
Definition of Terms.....	13
Sample Application for Ministerial Assessment Specialists.....	15
Part 1: Professional Demographic Information.....	15
Part 2: Certifications.....	16
Part 3: General Competence in Personality & Vocational Counseling and Assessment .....	18
Part 4: Specific Competencies in Psychological Testing and Assessment .....	19
Part 5: Ministry Assessment.....	20
Part 6: Continuous Improvement and Quality Assurance.....	21
Attestation .....	21

## Minimum Standards for Ministerial Assessment Specialists

The General Board of Higher Education and Ministry (GBHEM) supports the selection process in general of persons entering licensed or ordained ministry in The United Methodist Church and the psychological assessment process. GBHEM has established a recommended process for the required psychological evaluations, recommends assessment instruments, and recommends standards for those approved to provide the assessments.

An individual approved to provide psychological assessments is called a Ministerial Assessment Specialist (MAS). An MAS is approved through an application process, through which those applying demonstrate their credentials, experience, and training to meet Board of Ordained Ministry (BOM) requirements. Only those approved as an MAS may participate in the United Methodist's psychological assessment process.

Criteria for an approved MAS includes three primary competencies:

1. **Psychological Assessment** – a psychologist with specific training and experience in personality and vocational assessment, including test theory and construction, administration, scoring and interpretation.
2. **Interview Assessment** – a psychotherapist with graduate training in personality theory and psychotherapy, including experience in the application of clinical evaluative skills to vocational or personnel selection and evaluation.
3. **Ministry Assessment** – a person who values church and religious experience and is familiar with ministry issues as they apply to the selection and nurture of candidates in the UMC.

An MAS demonstrates knowledge of:

- **Technical assessment issues** (e.g., how ministry candidates score differently from other norm groups)
- **Evaluatory criteria** (e.g., how the criteria used in the decision-making processes – in ministry generally and the UMC in particular – are different from criteria in other selection contexts)
- **Effective interviewing** (e.g., how to interpret test results in ways that relate to the ministry context, balancing agendas of nurture and selection)

- **Effective report-writing** (e.g., how best to convey assessment information to both candidate and board/committee, who are typically non-clinicians)

The knowledge, experience, and credentials described above are to be demonstrated in the psychological assessment process at appropriate points. All three primary competencies must be present in a ministerial assessment.

In order to maintain their approved status, Ministerial Assessment Specialists must remain in good standing with the professional associations appropriate to their credentials.

## The BOM-MAS Partnership

The conference's BOM and MAS should work closely together to clarify their respective roles and expectations within the candidate evaluation process.

Topics of conversation should include:

- What are the leadership needs of the conference?
- What personal characteristics are of primary importance to the conference?
- What is the conference looking to assess in this stage of the candidate's ministry? (e.g., readiness, effectiveness, fruitfulness) [see the BOM Handbook, Section 3, Chapter 8]
- Which battery of assessments are contextually appropriate, reliable, and valid?
- What will the assessments cost?
- What report content is most helpful for the conference?
- What is the conference's annual timeline for candidate evaluation?
- What are assessment proctoring preferences of the MAS?
- If you're working with an agency, who will be doing the assessments?

## Selecting Psychological Assessments

Annual Conferences are urged to confer with their consulting psychologists about the selection of tests to be used in their assessments. Selecting tests to be used involves understanding highly technical issues about how the tests were constructed, researched, and accepted in academic literature. Licensed clinical psychologists will have had several graduate level courses on test construction, selection, and interpretation. They should also be familiar with the American Psychological Association's guidelines on the use of psychological tests and assessment. (<https://www.apa.org/about/policy/guidelines-psychological-assessment-evaluation.pdf>)

### **What does the annual conference need the psychologist to assess?**

The answer to this question will help determine which tests are used. Traditionally, at the candidacy level, there has been at least one test of psychopathology and another test of normal personality.

The primary goal at this point in the candidate's journey, is to assess for any significant mental or emotional problems that would disqualify a candidate. In other words, is the applicant fit for ministry?

A secondary goal has been to identify personality strengths that will be helpful in ministry and any personality weaknesses that might become liabilities in ministry. Some annual conferences test for other factors as well, such as IQ, marital satisfaction, cultural diversity understanding, etc.

### **What factors should be considered when selecting psychological tests?**

If psychological tests will be used to affect the lives and potential careers of persons, then there is a moral and ethical responsibility to be sure the tests used are both reliable and valid.

#### Reliability

Reliability means that a psychological instrument measures the same way each time that it is used. Its results are consistent, repeatable, are stable over time, and over a variety of conditions. The test should assess the same way each time the test is used. There should not be very much error in results. Factors that might contribute to error, and therefore less reliability, are poorly defined constructs or domains that the test is trying to assess. For

example, what does emotional intelligence, social competence, or ministerial effectiveness, mean? How precisely defined are those terms? Is there any consensus in the academic literature about their definitions, etc? Another factor contributing to error, and lower reliability, are poorly worded or confusing test questions. Writing good test questions is a highly developed skill.

One measure of reliability is called test – retest reliability. The same test is given to a group of people and then the same test is given to the same people some days, weeks, or months later. The results are studied to see how similar they are. The similarity can be expressed in a number from zero to one. The closer the number is to one, the stronger the instrument’s test – retest reliability is. Numbers in the .90 range represent strong reliability.

Another way to measure reliability uses some complicated math and statistics that measures how the test questions correlate to each other. That type of reliability is called internal consistency and is also expressed in a number from zero to one. The closer to one, stronger the reliability. Numbers in the 0.90 range represent strong reliability.

### Validity

Validity means that a test is measuring what it says it’s measuring. Reliability is a necessary, but not sufficient, contribution to validity. An unreliable test cannot be valid. However, a test might be reliable but still not valid. It might measure the same way each time it is used, but still not be measuring what it says it measures. At the most, a test can only be as valid as it is reliable. A test cannot be more valid than reliable.

Validity is more complicated than reliability, because there are different types of validity. Tests with strong validity have strong results on several types. A test’s validity is not a simple “yes, it is” or “no, it’s not” judgment.

There is *face validity*, which means that the test questions “on the face of them” seem to be measuring what the test purports to measure. For example, a test of depression would have test questions that “on the face of it” seems to be measuring depression.

Then there is *content validity*, which means that the test questions assess a thorough understanding and sampling of the construct being measured. For example, a test of depression might ask several questions about depressed mood and “on the face of it” the test would seem to be about depression. But mood alone is not a thorough understanding of depression. If the test also included questions about depressed behavior, it would have stronger content validity because it sampled both depressed mood and depressed behavior, the two sides of depression. Content validity requires a thorough and sophisticated understanding of the construct being measured. The more thoroughly and precisely a construct is defined and all aspects of it are sampled by test questions, the stronger the content validity will be.

Then there is *predictive validity*, which means that the test can accurately identify and / or predict what it says it is measuring. For example, a test of ministerial effectiveness (such a test does not exist) would accurately predict people who turn out to be effective ministers, and those who do not turn out to be effective. The test results would be predictive with some level of confidence. Another example would be a test of depression would correctly predict those who are depressed and those who are not.

There are numerous ways that validity can be assessed and measured. Validity may also be expressed as a number from zero to one. How those numbers are calculated is technical. Validity in the .90 range is strong. The test manual, that should be available with every published psychological test, will detail the construction of the test and the research used to assess the test's reliability and validity. Manuals contain very valuable information, and psychologists should be familiar with the manuals of the tests they use.

An Annual Conference's psychological consultant(s) can help clergy understand the strengths, and the weaknesses, of the tests being considered, or being used, and which tests seem best suited to assess what the Annual Conference wants to assess.

## Recommended Psychological Assessment Tools

The General Board of Higher Education and Ministry's Advisory Committee on Candidate and Clergy Assessment (ACCCA) recommends the following battery of psychological assessment tools:

- Clinical Assessment
- Normal Personality Assessment
- References form
- *Personal Data Inventory*
- Others (e.g., coaching tools) – these tools may be helpful for BOM discernment but are not appropriate for the full depth of assessment needed for candidates.

## Recommended Clinical Instruments

- MMPI-II
- MMPI-III
- MMPI-RF
- Personality Assessment Inventory (PAI)
- Million Clinical Multiaxial Inventory (MCMI-III)
- Stress Profile
- Symptoms Checklist (SCL-90)
- Inventory of Altered Self Capacities (iASC)
- Trauma Symptom Inventory (TSI)
- State-Trait Anger Expression Inventory
- Marital Satisfaction Inventory
- Prepare/Enrich
- Personality Research Form (PRF-E)



## Recommended Normal Personality Instruments

- NEO Personality Inventory (NEO-PI)
- California Psychological Inventory (CPI)
- Intercultural Development Inventory (IDI)
- Impact Event Scale (IES)
- Fundamental Interpersonal Relations Orientation (FIRO-B)
- 16 Personality Factor (16PF)

## The Psychological Assessment Process

### Certification of Candidacy and/or Request For License as Local Pastor

*Candidacy Mentor or appropriate party:* Requests assessment for candidate through the UM candidacy registry (Passage[UMC])

*Applicant:* Completes Personal Data Inventory, self-reference information, and assessment instruments then meets with MAS to discuss results of the assessment process.

*MAS:* Meets with the candidate after completion of report to assist candidate in assessing fitness for set-apart ministry; Recommends additional psychological resources as needed to enhance the candidate's development; Helps the candidate explore other vocational options as needed; and Sends assessment report to the BOM's psychological assessment chairperson or other appropriate dCOM/BOM representative (not the candidacy mentor or the DS).

### Application for Provisional Membership

*Conference Registrar:* Prepares list of provisional membership applicants for the psychological assessment chairperson to coordinate information for the MAS and applicants

*Applicant:* Participates in the testing and interview process as managed by the BOM.

*MAS:* Conducts a review as appropriate for provisional membership, presents results in a face-to-face interview with the candidate, and provides a written report to the chair of the Psychological Assessment Committee.

Results of the assessment are made available to:

- Candidate (face-to-face interview)
- BOM (Psychological Assessment Committee)
- Another mental health professional, if requested by the candidate for future work

## **Application for Ordination and Full Membership**

*BOM and Applicant:* Follow same process as applications for provisional membership

*MAS:* Prepares a report that focuses on developing effectiveness in ministry, considering the candidate's education and provisional membership experiences, any competency issues remaining from previous assessments and developing effectiveness in ministry

Results are available in the same manners as in applications for provisional membership

## **The Decision-making Process**

If possible, the MAS should be available to the BOM during deliberations. This allows for clarification of any issues raised, and the MAS may function as an observer and offer useful critique of the BOM.

## Psychological Assessment Retention Guidelines

Psychological assessment reports prepared during the candidacy period by the conference's MAS, and released to the BOM with the written permission of the referent should become a part of the candidacy records of the annual conference.

The MAS should retain all test scores and raw material data and provide only a written assessment report to the BOM. Test scores and other data from psychological assessment should be governed by a contractual arrangement between the annual conference and the ministerial assessment specialist. This contractual arrangement should be established prior to the gathering of psychological data and be consistent with the general guidelines of record keeping above. When a BOM discontinues a relationship with a psychologist, psychiatrist, or pastoral evaluation specialist, test scores, data, and copies of reports should be given directly to another ministerial assessment specialist retained by the annual conference.

With the written permission of the referent, blinded copies of test scores, and other relevant assessment data may be released for research, archival entry, or longitudinal study.

## Definition of Terms

**Ministerial Assessment Specialist (MAS):** a psychologist who meets the minimum standards set by the Advisory Committee on Candidacy and Clergy Assessment of GBHEM and is approved to provide psychological services to annual conferences of the UMC.

An MAS is selected and contracted to work directly with the annual conference BOM to provide psychological assessment consultation to individuals and to interview committees who work with candidates for ministry in the screening and nurture process.

An MAS provides information concerning an applicant's internal and interpersonal functioning by writing a psychological report viewed as a written consultation to interview committees for the purpose of discerning questions they may need to raise with candidates in their face-to-face interview, and as a part of the information BOMs will need to consider in making their final decision.

Test scores and other data from the psychological assessment should be governed by contractual arrangement between the annual conference and the psychological consultant. When a relationship between the BOM and an MAS is discontinued, test data and copies of reports should be passed on to another MAS retained by the annual conference.

**Recommended Battery:** a recommended battery of instruments established for regular use by MASs in the psychological dimensions of the evaluation procedures utilized by district committees and annual conference BOMs. The process for selecting the instruments to be included in the core battery involves three steps: (1) survey of instruments being utilized by MASs; (2) seminar/workshop experiences with MASs; (3) a synthesis of the results from both the survey and workshops by the Advisory Committee on Candidacy and Clergy Assessment.

The following list of instruments should be included in the standard core test battery, though the clinician may choose to add supplementary instruments of his/her own choosing in addition to these:

- Clinical Assessment (e.g., Minnesota Multiphasic Personality Inventory (MMPI-2, MMPI-2RF, MMPI-3))
- Normal Personality Assessment (e.g., Sixteen Personality Factor (16 PF))
- Personal Data Inventory (PDI)
- The Personal and Professional Reference List

**The Book of Discipline:** the book of law of the UMC. It is the instrument for setting forth the laws, plan, polity, and process by which United Methodists govern themselves. Each General Conference amends, perfects, clarifies, and adds its own contribution to the Discipline.

**Elder:** Those whose leadership in service includes preaching and teaching the Word of God, administration of the sacraments, ordering the Church for its mission and service, and administration of the Discipline of the Church are ordained as elders. (§ 332) The elder has primary responsibility for Word, the apostolic task of the faithful transmission of the faith and proclamation of the Word of God.

**Deacon:** Those who respond to God's call to lead in service and to equip others for this ministry through teaching, proclamation, and worship and who assist elders in the administration of the sacraments are ordained deacon. (§ 329) Deacons are those persons called by God, authorized by the church, and ordained by a bishop to a lifetime ministry of Word and Service to both the community and the congregation in a ministry that connects the two. They exemplify Christian discipleship; create opportunities for others to enter into discipleship and connect the needs and hurts of the people with the church.

**Local Pastor:** Full-time and part-time licensed local pastors under appointment are clergy members of the annual conference in which they are appointed. Those who are licensed for pastoral ministry and appointed to the local church shall preach, conduct divine worship and perform the duties of a pastor. (§ 315)

The licensed local pastor has answered the call from God to serve the mission of Jesus Christ through the work of the local congregation in the UMC. The licensed local pastor while appointed to a particular charge shall perform all the duties of a pastor and has the authority of a pastor only within the setting and during the time of the appointment and shall not extend beyond it.

**Advisory Committee on Candidacy and Clergy Assessment (ACCCA):** An advisory committee to GBHEM that engages in ongoing research projects which creates literature on clergy assessment. This literature has become the basis of consultation and testing for both boards of ordained ministry and ministerial assessment specialists.

## Sample Application for Ministerial Assessment Specialists

Through this application the certification, qualifications, training, and experience of each applicant are reviewed against the required criteria.

Please include a cover sheet of malpractice insurance when submitting the application.

### Part 1: Professional Demographic Information

Name:

Highest Degree:

Current Job Title:

Organization:

Mailing Address:

Street:

City:

State:

Zip:

Office Phone #:

Cell Phone #:

Email:

Web Site:

## Part 2: Certifications

### State Licensure:

I certify that I currently hold a valid license as a psychologist, or related mental health discipline (designate the actual title used in your state(s)), that I am in good standing with the state's licensing or regulatory agency, and that I can practice psychology without limitations or restrictions of that license in the following states/provinces. I agree to keep my license current and will inform the Chair of the Board of Ordained Ministry of the Conference(s) where I serve if/when I am no longer licensed.

I have included a copy of each license with this application.

State:

Licensing Title:

License Number:

Original Date of Issue:

### Ethical and Legal Status:

1. I certify that:
  - a. I have never had any licensing board or professional ethics body require me to surrender my license or find me guilty of a violation of ethics codes, professional misconduct, unprofessional behavior, incompetence or negligence in any state, province, or county, and
  - b. I have never been the subject of a complaint to an ethics committee and have never been charged with or convicted of a felony in any state, province or county, the disposition of which was other than acquittal or dismissal.
2. I agree that should I become the subject of an ethics complaint or the subject of an investigation by the state licensing/regulatory agency, or should I be indicted for a criminal act or have civil professional malpractice suit brought against me at any time when I am identified as, or serving as a Ministerial Assessment Specialist, that within 10 working days I will notify in writing the Chair of the Board of Ordained Ministry of the Conference(s) where I serve that such an action has been taken and identify the nature of such complaints, investigations, indictments, and/or suits.



3. I agree to abide by all applicable laws and administrative regulations of the state(s) where I practice, by the Ethical Principles of Psychologists and Code of Conduct of the American Psychological Association (or by the professional ethics code of my profession if I am not a psychologist) and by all other standards and guidelines promulgated by the American Psychological Association.

Professional Malpractice Insurance:

I certify that I have purchased and will maintain in force as long as I am certified as a Ministerial Assessment Specialist professional liability insurance coverage.

I have included a copy of the cover sheet of that insurance with this application.

Signature:

Date:

*If you are not able to certify to, or consent to, each of the above items, please provide a detailed explanation. Your explanation will be considered by the ACCCA in reviewing your application.*

### Part 3: General Competence in Personality & Vocational Counseling and Assessment

Education:

Institution:

Degree:

Year:

APA Major / Approved:

Professional Certifications: (such as those awarded by AAPC, AAMFT, etc.)

Organization / Certificate:

Professional Experience: (especially those that relate to competencies required to perform services of a Ministerial Assessment Specialist)

Position:

Dates:

Institution:

Responsibilities & Duties:

Membership in Professional Associations:

Organization:

Type of Membership:

Beginning Date:

## Part 4: Specific Competencies in Psychological Testing and Assessment

*Graduate and Post-graduate courses in psychological testing/measurement and personality assessment:* (List name of course and assessment technique, such as intellectual and cognitive, objective personality, projective, interest, aptitude and vocational)

Course Name:

Assessment Technique:

*List your skill training, supervised experience and professional experience relative to these tests and assessment techniques:* (The following instruments are included in the Board of Higher Education and Ministry battery of tests for clergy assessment.)

Minnesota Multiphasic Personality Inventory:

16 Personality Factor:

Incomplete Sentences:

List the psychological tests and inventories which you utilize in the assessment process with ministers:

## Part 5: Ministry Assessment

Church Membership:

Ordained: Yes / No

If yes: Deacon / Elder

List your training/experience concerning the way that ministerial candidates score differently from other norm groups on the MMPI and other psychological assessment instruments:

List your training/experience concerning how the criteria used in the decision-making process in ministry differ from criteria in other selection contexts:

List your training/experience concerning how these evaluation criteria apply to the United Methodist ministry in particular, including your involvement in and knowledge of the United Methodist Church and ministry:

List your experience/training in interpreting test results in ways that relate to the ministry context, balancing the needs for both nurture and selection:

List the experience/training which prepares you to write a report to convey assessment information to both candidate and board/committee in language which communicates to non-clinicians:

## **Part 6: Continuous Improvement and Quality Assurance**

Continuing education is one means of maintaining professional expertise relative to the specialized objectives of the psychological assessment of candidates for Church vocations.

Have you attended a national or regional training session for ministerial evaluators? Yes / No

Comments:

### **Attestation**

I attest and certify that I have answered the above application questions truthfully and that the information given in or attached to this application is accurate and complete to the best of my knowledge.

Applicant's Signature:

Date: