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| **D1** | **LEADS WORSHIP** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Invokes a sense of the sacred through inclusive liturgy and holistic ritual. |  |  |  |  |  |
| 2 | Selects elements that create a flow to the service relevant to the theme. |  |  |  |  |  |
| 3 | Creates a worship service that demonstrates multicultural and multi-generational sensitivity. |  |  |  |  |  |
| 4 | Collaborates with participants in designing the worship service. |  |  |  |  |  |
| 5 | Ensures that aesthetics enhance the worship experience. |  |  |  |  |  |
| 6 | Completes sermon preparation in an efficient manner (e.g. balances with other responsibilities.) |  |  |  |  |  |
| 7 | Delivers sermon that is emotionally fulfilling, spiritually nurturing and intellectually stimulating. |  |  |  |  |  |
| 8 | Inspires people with words and presence. |  |  |  |  |  |
| 9 | Engages full range of delivery skills (e.g. body movement, facial expressions and voice.) |  |  |  |  |  |
| 10 | Conveys ministerial authority and presence. |  |  |  |  |  |
| 11 | Trains volunteers in the elements and leadership of worship. |  |  |  |  |  |
| 12 | Ensures the application and continuity of the “freedom of the pulpit and pew” (e.g. responds constructively to those who challenge the tradition.) |  |  |  |  |  |

**COMMENTS**

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| **D2** | **OFFICIATES RITES OF PASSAGE** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Articulates UU theology and history relevant for life passages. |  |  |  |  |  |
| 2 | Prepares people for rites of passage (e.g. does pre-marital counseling, involves participants in memorial services). |  |  |  |  |  |
| 3 | Designs engaging and meaningful rites of passage. |  |  |  |  |  |
| 4 | Discerns role in acting as an agent of the state. |  |  |  |  |  |
| 5 | Designs rituals to welcome new members. |  |  |  |  |  |
| 6 | Creates celebrations of milestones (e.g. building projects, neighborhood alliances, social justice project launches, etc.). |  |  |  |  |  |
| 7 | Designs rituals to recognize and commission leaders and volunteers (military chaplains, Board members, significant volunteers). |  |  |  |  |  |

**COMMENTS**

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| **D3** | **PROVIDES PASTORAL CARE AND PRESENCE** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Provides pastoral visits (e.g. in hospital, hospice, home, prison, etc.). |  |  |  |  |  |
| 2 | Provides pastoral counseling that facilitates healing (e.g. grief work, trauma, addictions, sexuality concerns, hospice, chaplaincy, etc.). |  |  |  |  |  |
| 3 | Provides direct pastoral support to caregivers. |  |  |  |  |  |
| 4 | Maintains a consistent pastoral presence (e.g. through written notes, coffee hour, meetings, email, public events, etc.). |  |  |  |  |  |
| 5 | Addresses trauma in wider community through ritual, worship and communication networks. |  |  |  |  |  |
| 6 | Demonstrates multicultural and multi-generational competency in direct pastoral care. |  |  |  |  |  |
| 7 | Maintains professional boundary / presence when using various communication technologies (e.g. social media, email, Facebook, list serves). |  |  |  |  |  |
| 8 | Holds self and others accountable to professional boundaries. |  |  |  |  |  |
| 9 | Maintains ministerial role in the social life of the institution. |  |  |  |  |  |
| 10 | Maintains a plan and accountability system to address sexual attractions. |  |  |  |  |  |
| 11 | Manages lay pastoral care ministries (e.g. lay pastoral visitors, caring committees, grief groups, etc.). |  |  |  |  |  |
| 12 | Utilizes community/ UU resources to support the pastoral needs in one’s ministry setting (e.g. local law enforcement, emergency personnel, addictions groups, sexual health, community health and welfare, nursing, etc.) |  |  |  |  |  |

**COMMENTS**

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| **D4** | **ENCOURAGES SPIRITUAL DEVELOPMENT** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Integrates religious education into all aspects of ministry (e.g. preaches on faith formation, leads reflection following social justice effort). |  |  |  |  |  |
| 2 | Directs religious education program for all ages. |  |  |  |  |  |
| 3 | Leads events and services that promote multicultural and multi-generational community and learning. |  |  |  |  |  |
| 4 | Integrates one’s personal spiritual practice into one’s ministry. |  |  |  |  |  |
| 5 | Provides direct spiritual guidance to support individual faith journeys. |  |  |  |  |  |
| 6 | Leads spiritual practice classes, retreats and pilgrimages. |  |  |  |  |  |
| 7 | Provides individuals with the tools to deconstruct, reframe and reconstruct religious traditions and language from their past. |  |  |  |  |  |
| 8 | Provides avenues for deepening Unitarian Universalist identity. |  |  |  |  |  |

**COMMENTS**

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| **D5** | **DUTY 5: WITNESSES TO SOCIAL JUSTICE IN THE PUBLIC SQUARE** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Inspires a prophetic response from the congregation or community to social justice issues (e.g. social service, public witness, advocacy). |  |  |  |  |  |
| 2 | Leads congregation or community to join coalitions to act on social issues. |  |  |  |  |  |
| 3 | Grounds the call to social justice work in Unitarian Universalist theologies. |  |  |  |  |  |
| 4 | Develops a communication plan employing diverse media to maximize social justice impact. |  |  |  |  |  |
| 5 | Connects social justice work to anti-oppressive, multi-cultural vision of the beloved community. |  |  |  |  |  |
| 6 | Promotes public dialogue across religious and values-based differences. |  |  |  |  |  |

**COMMENTS**

| **D6** | **LEADS ADMINISTRATION** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
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| 1 | Focuses the institution’s resources and programs to fulfill the mission. |  |  |  |  |  |
| 2 | Guides the institution to implement its strategic plan. |  |  |  |  |  |
| 3 | Implements policies and procedures in compliance with local, state and federal laws. |  |  |  |  |  |
| 4 | Manages internal and external communications to enhance the mission of the institution. |  |  |  |  |  |
| 5 | Promotes the values of Unitarian Universalism through technology and the media. |  |  |  |  |  |
| 6 | Empowers professional and volunteer staff to work independently and collaboratively. |  |  |  |  |  |
| 7 | Evaluates performance of professional and lay staff based upon agreed upon work goals. |  |  |  |  |  |
| 8 | Ensures quality and continuity of programming in support of the mission. |  |  |  |  |  |
| 9 | Provides opportunities for leadership development of board members, committee members and other lay leaders. |  |  |  |  |  |
| 10 | Collaborates with governing board in implementing effective leadership of the institution. |  |  |  |  |  |
| 11 | Mediates conflicts with political savvy. |  |  |  |  |  |
| 12 | Applies counter oppressive lens to leadership of institution. |  |  |  |  |  |
| 13 | Manages budgets, financial reports, and fiduciary responsibilities. |  |  |  |  |  |
| 14 | Integrates a theology of stewardship into the life of the institution. |  |  |  |  |  |
| 15 | Creates maintenance standards and building use policies (e.g. building use calendar, capital improvement budget item, etc.). |  |  |  |  |  |
| 16 | Implements membership systems (e.g. welcoming, recruiting, maintaining statistics, integrating new members). |  |  |  |  |  |
| 17 | Leads institution through a healthy transition process (e.g. retirement, staff changes, illness or death). |  |  |  |  |  |
| 18 | Leads interim processes, planning and/ or ministry. |  |  |  |  |  |

**COMMENTS**

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| **D7** | **PURSUES PERSONAL RENEWAL AND PROFESSIONAL DEVELOPMENT** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Makes time for family, friends and acquaintances. |  |  |  |  |  |
| 2 | Maintains intimate or meaningful relationships (friendships, love relationships) outside of the ministry setting. |  |  |  |  |  |
| 3 | Takes time off (e.g. vacations, study leave, Sabbath days, and sabbaticals). |  |  |  |  |  |
| 4 | Meets as needed with therapist/ counselor/ spiritual director. |  |  |  |  |  |
| 5 | Joins professional associations. |  |  |  |  |  |
| 6 | Attends UUMA gatherings (e.g. General and District Assemblies). |  |  |  |  |  |
| 7 | Maintains professional credentials and licenses. |  |  |  |  |  |
| 8 | Eats a healthy diet. |  |  |  |  |  |
| 9 | Visits doctors/ dentists regularly. |  |  |  |  |  |
| 10 | Engages in regular exercise. |  |  |  |  |  |
| 11 | Gets an adequate amount of sleep. |  |  |  |  |  |
| 12 | Engages in recreational, cultural and social activities. |  |  |  |  |  |
| 13 | Models spiritual, physical, sexual, and emotional health. |  |  |  |  |  |
| 14 | Manages financial security. |  |  |  |  |  |
| 15 | Ensures one’s call is in alignment to the current ministry setting (e.g. knows when to seek new position). |  |  |  |  |  |
| 16 | Integrates new knowledge and skills into ministry. |  |  |  |  |  |
| 17 | Applies ongoing learning related to issues of privilege and power. |  |  |  |  |  |

**COMMENTS**

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| **D8** | **DUTY 8: SERVES THE LARGER UNITARIAN UNIVERSALIST FAITH** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Connects local congregation/ institution to regional, national, and international UU gatherings. |  |  |  |  |  |
| 2 | Promotes UU ordained ministry in a visible way (e.g. mentoring new ministers, educating laity about their roles in ordaining and installing ministers). |  |  |  |  |  |
| 3 | Establishes a culture of generosity and stewardship related to the larger faith. |  |  |  |  |  |
| 4 | Lives out the collegial spirit expressed in the UUMA covenant. |  |  |  |  |  |
| 5 | Leads collaborative staff teams in a spirit of shared ministry. |  |  |  |  |  |
| 6 | Promotes the work of community clergy and their affiliation with the congregation. |  |  |  |  |  |
| 7 | Follows UUMA process for addressing concerns when holding self and others accountable to professional standards (e.g. contact Good Officer). |  |  |  |  |  |
| 8 | Leads seminars, classes, workshops. |  |  |  |  |  |

**COMMENTS**

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| **D9** | **LEADS THE FAITH INTO THE FUTURE** | **Strength** | **Satisfactory** | **Area for Growth** | **Weakness** | **Not Observed** |
| 1 | Champions a vision of a multicultural, multi-generational and diverse Unitarian Universalism. |  |  |  |  |  |
| 2 | Exhibits adaptive leadership abilities (e.g. Integrates learning, collaborates with groups outside UU, tolerates ambiguity). |  |  |  |  |  |
| 3 | Provides leadership opportunities for youth and young adults. |  |  |  |  |  |
| 4 | Expands the boundaries of Unitarian Universalist community through the use of evolving media technology (e.g. social media, virtual community, outreach missions, etc.). |  |  |  |  |  |
| 5 | Cultivates culture and practices of radical hospitality. |  |  |  |  |  |
| 6 | Promotes new ways of expressing Unitarian Universalism (e.g. house churches, revivals, cooperatives, second site, satellite congregations) |  |  |  |  |  |
| 7 | Prioritizes recruitment of new ministers. |  |  |  |  |  |
| 8 | Serves as a field education and/ or internship supervisor. |  |  |  |  |  |
| 9 | Mentors seminarians and new colleagues to develop their potential and foster retention. |  |  |  |  |  |
| 10 | Promotes Unitarian Universalist values |  |  |  |  |  |
| 11 | through leadership in non-profit organizations and/ or interfaith alliances. |  |  |  |  |  |
| 12 | Inspires the institution to connect with and mentor other UU institutions. |  |  |  |  |  |
| 13 | Creates new revenue streams (e.g. new forms of membership, marketing of UU products). |  |  |  |  |  |

**COMMENTS**