

# FULFILLING THE CALL



A Model for UU Ministry  
in the 21st Century



# **Fulfilling the Call**

A Model for UU Ministry in the 21<sup>st</sup> Century

A Partnership of the  
Unitarian Universalist Association,  
the Unitarian Universalist Ministers Association,  
and Education Development Center, Inc.

Unitarian Universalist Association  
Boston

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*The Fulfilling the Call Profile handout appears at the back of the book.*



# Fulfilling the Call

## Task Force Members

**Rev. Howard Dana**

Unitarian Church of Harrisburg  
Harrisburg, PA

**Rev. Dr. Alicia Grace**

University Unitarian Church  
Seattle, WA

**Rev. Abhi Janamanchi**

Unitarian Universalists of Clearwater  
Clearwater, FL

**Rev. Nancy Palmer Jones**

First Unitarian Church of San Jose  
San Jose, CA

**Rev. Daniel Kanter**

First Unitarian Church of Dallas  
Dallas, TX

**Rev. Sarah Lammert**

Director for Ministries and Faith  
Development, UUA  
Boston, MA

**Rev. David Pettee**

Ministerial Credentialing Director, UUA  
Boston, MA

**Rev. Don Southworth**

Executive Director  
UU Ministers Association  
Durham, NC

**Rev. Robin Tanner**

Piedmont Unitarian Universalist Church  
Charlotte, NC

**Rev. Cheryl M. Walker**

Unitarian Universalist Fellowship of  
Wilmington  
Wilmington, NC

**Profile Facilitators**

**Joseph Ippolito**

Education Development Center  
Cleveland, OH

**Joyce Malyn-Smith, Ed. D.**

Education Development Center  
Newton, MA

**Rev. Harlan Limpert**

Vice President  
UU Ministries and  
Congregational Support  
Boston, MA



# Ways to Use the Fulfilling the Call Handbook

## How those considering ministry might use Fulfilling the Call

Many talented people considering seminary and a life of religious leadership do so quite naturally based on the aspects of ministry they find most attractive—preaching, pastoral care, congregational leadership, or some other expression of professional leadership. For example, experiencing great preaching at their home congregations they think, “I can do that—and I’d love it!” It’s only later that they realize that, important as preaching is to parish ministry, it’s only one part of what they do—especially in their first settlement, where turning on the boiler on Sunday morning may be the expected prelude to the worship service.

Of course, no minister is expected to perform all the duties and tasks listed in the Fulfilling the Call grid much less perform them all at the same expert level. But deep reflection on the part of those considering seminary on the many duties and tasks, ideally in conversation with those already serving in the area of ministry they are considering—parish, community, whatever—can be instructive. One can discern one’s unique interests, gifts, inclinations, and needs in a more comprehensive way and decide whether to begin the road to professional ministry.

## How those in seminary might use Fulfilling the Call

Ministry takes on numerous forms and occurs in countless settings. While the Fulfilling the Call handbook was primarily developed by parish and community ministers, it is hoped that the approach underlying it—identifying specific duties and tasks of ministry and exploring what competence looks like—might be applied to multiple settings for ministries a seminarian might consider.

Seminarians would benefit from reflecting on the duties and tasks of ministry, reflecting on the responsibilities already managed in previous paid and voluntary positions, and determining which areas of study are most important to pursue and in what order. Someone with significant public speaking experience likely has nailed the portions of the rubrics dealing with “maintaining composure,” “presenting oneself as confident and competent,” and “employing gestures and voice inflection” and therefore can focus attention on “conveying ministerial authority and presence” and “invoking a sense of the holy.”

Literally assessing one’s current level of competence in each of the duties and tasks and seeking out opportunities to enhance one’s skills on those areas of need can help guide the seminarian toward a more focused and productive educational experience.



## **How current ministers might use Fulfilling the Call**

A human resource professional was once asked the major difference between recent college graduates and those in the workforce for ten or more years. “Recent graduates tend to think they do *everything* well. Seasoned workers are, not surprisingly, more mature. They have gained greater insight into their strengths *and* weaknesses.”

Those currently serving in a community or congregational setting can use the Fulfilling the Call handbook to candidly assess themselves periodically throughout their ministry and reflect upon the areas in which they wish to grow—and in what order. Putting together a self-development plan, they may wish to seek out colleagues, trusted congregants, members of the Committee on Ministry, or a supervisor for coaching or mentoring. They may wish to seek online classes or workshops at nearby seminaries to augment their self-study.

## **How evaluation bodies might use Fulfilling the Call**

One of the challenges with which congregations and community organizations commonly struggle is determining how to provide specific, useful developmental feedback to their minister. The Fulfilling the Call handbook, used thoughtfully and respectfully, can provide the tool to do that.

Evaluation bodies may want to collectively review each of the duties and tasks of their minister, circling the level at which they view the minister’s level of competency. Because many of the specific tasks are outside the purview of those conducting the evaluation, a “Not Directly Observable” designation would need to be used often.

## **How search committees might use Fulfilling the Call**

Ministerial search committees hope for the perfect candidate in the same way that candidates hope for the perfect church. Neither exists. But search committees can use the Fulfilling the Call handbook and specifically the duties and tasks to determine specifically what qualities and skills are most desired, literally listing in priority order where Duty 1—Leads Worship—stands in relation to Duty 3—Provides Pastoral Care and Presence. The search committee, in addition to rank ordering the needs of the congregation, can gain a greater level of appreciation for the breadth and depth of skills needed for effective ministry and be more realistic in determining where a higher level of expertise is needed and where the gifts of the candidate can continue to grow over time.

In the meantime, the minister may want to conduct a self-evaluation using the same process of circling the level of competency the minister believes has been achieved.

Where there are differences, conversations can occur and plans developed for improvement.

Key to effective use of the handbook as an evaluative tool is recognition that no minister, just like no congregation or organization, can do everything, nor can they perform all duties at the same high level of competence. Therefore, good judgment and good intentions are crucial to the effective use of the handbook as an evaluative tool.

### **How the Ministerial Fellowship Committee (MFC) is using Fulfilling the Call**

The Ministerial Fellowship Committee (MFC) is currently undertaking a multi-year process of reviewing and revising the competencies required for the credentialing of ministers. While the MFC will continue to require academic ability as well as applied knowledge, Fulfilling the Call provides a considered approach to the duties and tasks required for 21<sup>st</sup> century ministry in our faith. In addition, the rubrics will allow the MFC new insights into the baseline competency they are looking for in successful candidates for UU ministry, as well as for those crossing the threshold into final fellowship. Fulfilling the Call is more than an assessment framework; it is a potentially transformative look at the depth and breadth of the applied art of Unitarian Universalist ministry.

### **How the UUA is using Fulfilling the Call**

The creation of the Fulfilling the Call handbook grew out of the Strategic Review of Professional Ministries study conducted in 2008. Among other things, the study encouraged a closer relationship between the Unitarian Universalist Ministers Association and UUA staff in identifying ways in which the two could work together to support the professional ministries of our movement.

The broad range of ministers involved in creating Fulfilling the Call have challenged both the UUA and the UUMA to continue having their strategies and tactics informed by what Fulfilling the Call determined was a model for ministry in the 21<sup>st</sup> century.

### **How the UU Ministers Association (UUMA) is using Fulfilling the Call**

The mission of the UUMA is to nurture excellence in ministry through continuing education, collegiality and collaboration. The Fulfilling the Call handbook will be helpful in all three areas. Our CENTER (Continuing Education Network, Training, Enrichment, Renewal) Committee is responsible for designing and delivering continuing education programs to our members. They will be using the Handbook to assist in planning and developing future training, coaching expertise. We will encourage colleagues to use the handbook in chapters and clusters to share ideas

and feedback and we will work closely with the UUA and other religious professional groups to assist in designing tools and resources to support the duties and tasks critical to ministry.

## Introduction

*Fulfilling the Call: A Model for Unitarian Universalist Ministry in the 21<sup>st</sup> Century* is the product of a year-long partnership between the Unitarian Universalist Association (UUA), the Unitarian Universalist Ministers Association (UUMA), and Education Development Center, Inc. (EDC). Employing a methodology utilized by many different professionals, the initiative was launched to describe the developmental stages of excellence for UU ministers over the arc of their careers.

EDC is a global nonprofit organization that develops, delivers, and evaluates innovative programs to address some of the world's most urgent challenges. Working with public-sector and private partners, EDC works to improve education, health promotion and care, workforce preparation, communication technologies, and civic engagement. EDC currently manages 250 projects located in 23 countries. Within its Learning and Teaching Division, EDC senior staff bring more than 20 years of experience developing tools that define new, emerging professions, as well as traditional professions undergoing significant change.

*Fulfilling the Call* draws upon the expertise and experience of a task force of UU ministers representing a variety of ministerial structures and settings. The framework builds upon previous work developed by EDC in partnership with Roman Catholic clergy.<sup>1</sup> It demonstrates how best practices in occupational analysis and performance-based assessment can be adapted to address the changing nature of UU ministry. *Fulfilling the Call* provides a new resource for clergy and laity alike to view and understand the expectations placed upon the 21<sup>st</sup> century UU minister.

Following the process EDC has employed with other professions, the UUA/UUMA/EDC team focused their discussions around the development of two documents that outline a new framework for UU Ministry. These documents include a profile of a UU minister and a collection of performance-based rubrics that are aligned to the profile. The profile portrays what it is that an effective UU minister is expected to know and be able to do. The performance-based rubrics provide guidance for assessing how well a minister performs the ministerial responsibilities outlined in the profile.

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<sup>1</sup> In separate projects, EDC worked with panels of Roman Catholic priests to create ministerial profiles and performance-based rubrics. See J. Ippolito, M. Latcovich, & J. Malyn-Smith, *In Fulfillment of Their Mission: The Duties and Tasks of a Roman Catholic Priest* (New York: NCEA Publication, 2008) and J. Ippolito & J. Malyn-Smith, *In Fulfillment of Our Mission: The Ministerial Responsibilities of a Parish Priest* (Edinburgh, Scotland: Archdiocese of Saint Andrews and Edinburgh, 2011).

## Developing the profile of a UU minister

The UUA/UUMA recruited a diverse group of ministers to serve as a task force for the project. Criteria considered in selecting these ministers included gender, racial/ethnic background, age, geographic location of ministry, sexual orientation/identity, and diversity of ministry setting. The task force was comprised of: the Rev. Howard Dana, Unitarian Church of Harrisburg, Harrisburg, PA; the Rev. Dr. Alicia Grace, University Unitarian Church, Seattle, WA; the Rev. Abhi Janamanchi, Unitarian Universalists of Clearwater, Clearwater, FL; the Rev. Nancy Palmer Jones, First Unitarian Church of San Jose, San Jose, CA; the Rev. Daniel Kanter, First Unitarian Church of Dallas, Dallas, TX; the Rev. Sarah Lammert, Director for Ministries and Faith Development, UUA, Boston, MA; the Rev. Harlan Limpert, Vice President, UU Ministries and Congregational Support, Boston, MA; the Rev. David Pettee, Ministerial Credentialing Director, UUA, Boston, MA; the Rev. Don Southworth, Executive Director, UU Ministers Association, Durham, NC; the Rev. Robin Tanner, Piedmont Unitarian Universalist Church, Charlotte, NC and the Rev. Cheryl M. Walker, Unitarian Universalist Fellowship of Wilmington, Wilmington, NC. EDC was led by Joe Ippolito, Senior Project Director, and Dr. Joyce Malyn-Smith, Managing Project Director.

Once the task force had been assembled, EDC provided it with guidance for creating “learning occupation” statements. The “learning occupation” is a concept EDC has adapted from best practices in worker training in Germany and other European countries.<sup>2</sup> A learning occupation is an invented construct that does not exist in the workplace; nor does it correspond to a specific occupational title or description. Rather, it represents the combination of all tasks, knowledge, skills, and attributes required to perform a range of job functions conducted in a group of related real-life occupations. In effect it is an occupational definition, which serves as the foundation for all subsequent discussion. Each task force member drafted a “learning occupation” statement.

At the first meeting of the task force, the group of learning occupation statements was reviewed and discussed. Ultimately, the task force agreed upon the following statement:

*Inspired by that which is sacred, informed by theological reflection and spiritual practice, and grounded in Unitarian Universalist faith and traditions, a Unitarian Universalist minister/clergyperson serves and leads people in congregations, communities, and in other institutions (e.g., hospitals, military, schools, community organizations, and prisons) through worship, rites of passage, pastoral care, teaching, administration, and public witness.*

The definition of the learning occupation statement became the subject of a modified DACUM analysis facilitated by EDC. DACUM (Developing A CURriculum)<sup>3</sup> is a method for

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<sup>2</sup> Judith Leff and Monika Aring, *Gateway to the Future: Skill Standards for the Bioscience Industry* (Newton, MA: Education Development Center, Inc., 1995), 27.

<sup>3</sup> Robert E. Norton, *DACUM Handbook* (Columbus, OH: Ohio State University, 1997). The DACUM process has been widely promoted by Robert E. Norton and the Center on Education and Training for Employment at Ohio State University.

practitioners in an occupational field to identify the major areas of work and the constituent tasks that define successful job performance. Methods like DACUM rest upon three basic principles:

- Expert workers can describe and define their job more accurately than anyone else.
- An effective way to define a job is to precisely describe the tasks that expert workers perform.
- All tasks, in order to be performed correctly, demand certain knowledge, skills, resources, and behaviors.

The DACUM process itself was a two-day, guided dialogue during which the task force sought to identify all the responsibilities (large and small) incumbent upon an individual fitting the description of the learning occupation. These ministerial responsibilities were expressed in brief statements that describe concrete, observable activities using a single verb and object. The final wording of each statement was achieved through group consensus. The purpose of this exercise was to achieve a high degree of specificity and clarity in the descriptions of activities performed by a UU minister.

Once all activities had been identified, the task force organized them into major areas of ministerial responsibilities (i.e., duties) and their constituent tasks. This organization of duties and tasks is depicted as a matrix in the ministerial profile. While the tasks with duties are not organized in terms of priority or importance, the task force did try to arrange them in a logical sequence if at all possible. To complete the profile, the task force identified those elements that enable a minister to perform these activities. In short, these include:

- a list of the skills and knowledge necessary for a minister to perform his/ her responsibilities
- a list of the behaviors, or attributes, demonstrated by a successful minister.

The task force did not intend these lists to be exhaustive, however they believed that they provide a fairly complete picture of what skills, knowledge, and behaviors an effective UU minister is likely to exercise in ministry. Lastly, the task force identified major trends and concerns that help define the current context in ministry.

## Validating the profile

The profile developed by the task force was broadly disseminated to UU clergy throughout the country to enable them to review and comment on it. EDC adapted the online survey it has used to validate occupational profiles from a variety of professions including Roman Catholic priests, criminal investigators, and social technology-enabled professionals. UUA administrators reviewed the survey tool, suggested modifications in language, and disseminated it. UU ministers had an opportunity to review the profile and comment on it over a six-week period between February 28 and April 9, 2012.

The aim of this validation process was to ensure that the profile authentically represents the work of a UU minister and that it has broad applicability. The survey asked respondents to do four things:

- provide basic demographic data about themselves and their ministry
- determine the importance of each identified task in the performance of their ministry
- identify the frequency which each task is performed
- review the additional lists developed for the profile (skills and knowledge; behaviors; resources; and current context).

The combination of importance and frequency scores were used to understand the “view from the field” of the priorities of ministerial work. Respondents were asked to review each of the duties and tasks identified in the profile and to indicate how important they believed each task to be and how frequently they performed them. The survey provided a Likert scale for describing the importance of a task that included the categories “Essential, Very Important, Important, and Somewhat Important.” Similarly, a Likert scale was provided to describe the frequency by which tasks were performed. The categories for this second scale were “Daily, Weekly, Monthly, Rarely, and Not Applicable.”

Respondents were also given an opportunity to provide examples of skills, knowledge, and behaviors that they believed needed to be added to the lists created by the task force. A final section of the survey allowed respondents to comment on the profile as a whole.

A total of 381 individuals answered at least some portions of the survey, with 296 (77.7%) completing the entire set of questions. Nearly 25% (63) of the 256 respondents who had the option of identifying themselves as a “minister in a community ministry setting” did so. Less than 7% (16) of the 254 respondents able to select “retired” as an option did so. Other characteristics of survey respondents included:

- a majority (54.3%) have served in the ministry more than 10 years
- a majority (55.6%) are 55 years of age or older
- an overwhelming majority (90.6%) identify themselves ethnically as white

- large majorities indicate that they hold a bachelor's degree (80.9%) and a master of divinity degree (89.1%)
- more than three quarters (77.7%) had a career prior to becoming a minister.

The responses of those completing the survey provide strong affirmation that the task force accurately articulated the work of a UU minister as defined by the learning occupation. Nevertheless, after reviewing the comments of respondents, the task force did make several minor additions and changes in language to finalize the profile.



## Reading the profile

The core of the ministerial profile is the two page matrix that defines who the UU minister is and articulates what it is that the UU minister is expected to do. The task force's definition of a UU minister (AKA, "the learning occupation") is printed on top of the matrix and is intended to be general enough that every UU minister can "see" him/herself in it.

The matrix itself organizes the activities of a UU minister, as defined by the task force, into major responsibilities (*duties*) and their constituent *tasks*. The task force generated this collection of activities intending to be comprehensive and without intending to imply that any one UU minister would perform every single one of them.

The nine duties are listed numerically on the far left column and represent major areas of work. They include:

1. Leads worship
2. Officiates rites of passage
3. Provides pastoral care and presence
4. Encourages spiritual development
5. Witnesses to social justice in the public square
6. Leads administration
7. Pursues personal renewal and professional development
8. Serves the larger Unitarian Universalist faith
9. Leads the faith into the future

The tasks run horizontal to the duties in adjacent columns. Each task is referenced with the duty number and letter. For example, the task "Prepares holistic and inclusive worship, liturgy, and rituals" is referenced as 1A, indicating it is the first task for Duty One. Similarly, the task "Creates rituals for major life transitions" is referenced as 2A to indicate that it is the first task of Duty Two, etc. The order of the tasks does not necessarily reflect their importance.

The knowledge, skills, and behaviors that enable a UU minister to be effective are listed alphabetically on the last page of the profile. The lists are not intended to be exhaustive but represent the consensus of the task force, with additions drawn from the results of the validation survey. The list of trends, opportunities, and concerns provides a snapshot of some of the forces confronting the practice of ministry.

## Developing the rubrics

For the purposes of this project, a rubric is understood to be a scoring tool that specifies the level of performance expected for several levels of quality. Rubrics illustrate degrees of effectiveness in performing a task by contextualizing that task in statements that describe specific, observable activity. Using a methodology that has been successful across a number of professions, EDC guided the task force through a process that resulted in the development of a performance rubric for each of the duties.

Designing performance-based rubrics requires drafting language that illustrates various stages of work activity. Within EDC's process, this involves the creation of "action statements." The use of action statements to further define work has grown out of EDC's projects involving helping professions, where effective interaction with clients typically demands that workers possess special attributes like compassion, active listening, and the ability to empower individuals to make their own decisions. The degree to which these attributes exist proves to be difficult to evaluate. However, when these attributes are viewed within the context of the work, their presence is more easily discerned. Determining for example whether or not a nurse offers his services "compassionately" is more easily detected if we are presented with examples of what compassion "looks like" when treating a patient. The purpose of action statements is to provide important, additional information about a job that allows someone to better understand what occurs in the performance of occupational responsibilities.

This same process of creating contextualized examples was performed by the task force. As the task force considered the activities it had articulated in the ministerial profile, it developed hundreds of "action statements" that:

- describe concrete activity
- describe observable activity
- begin with and include only one verb
- describe activity using language that is specific and germane to UU ministry
- include parenthetical examples to more fully illustrate the action described
- avoid using "evaluative" terms (such as "adequate," "appropriate," "sufficient").

The collection of action statements generated by the task force provided the raw material needed to construct rubrics aligned to the duties outlined by the profile. For each of the nine duties, the task force reviewed all pertinent action statements and then, painstakingly, arranged them in sequences that illustrate developmental levels of performance mastery. In many instances, the task force developed additional action statements, or revised the wording of actions statements. Through several reviews, the task force sought to have each rubric illustrate clearly and precisely a progression of ministerial performance.

## Reading the rubrics

The rubrics for each duty are organized following the format below:

<b>DUTY</b>				
<i>Performance Areas and Associated Tasks from the Profile</i> ↓	<b>Level One</b>  <b>Basic Competence</b>	<b>Level Two</b>  <b>Approaching Proficiency</b>	<b>Level Three</b>  <b>Proficiency</b>	<b>Level Four</b>  <b>Expert/Exceptional</b>
	<i>Performance Statements</i>	<i>Performance Statements</i>	<i>Performance Statements</i>	<i>Performance Statements</i>

The far left column on the rubric charts lists the *performance area* for the duty being analyzed. Performance areas integrate one or more ministerial tasks, which are indicated beneath the performance area in the far left column.

The columns to the right of the performance area present four *performance levels* that show incremental levels of effectiveness. These levels range from basic competence, approaching proficiency, proficiency, and expert/exceptional. By definition, the “basic competence” level represents the performance of what would generally be expected of a recent graduate from seminary. One would see the potential presence of pastoral skills that still require further development. The level designated as “approaching proficiency” indicates a more highly developed skill level and a more mature, integrated ministerial experience. The level of “proficiency” provides examples of that describe a stage of skill development expected of an effective minister. This is someone who is able to integrate and to apply ministerial skills and knowledge to solve complex problems. Finally, the performance level “expert/exceptional” includes statements that indicate exemplary service and ministry. In many ways the minister becomes a role model and minister to his peers.

Each performance level includes several performance statements (AKA action statements). The performance statements illustrate levels of effectiveness within the performance area. They are, in effect, performance indicators. When used to assess performance, performance statements presume mastery of the performance levels to the right. In other words, for example, within a line of a rubric, being proficient at a task presumes being able to do the activities described at the basic competence and approaching proficiency levels.



## Using the profile and rubrics

The tools developed by the task force have the potential to be used in a variety of ways. For example, the profile and rubrics might be used as:

- a resource for a planned ministerial credentialing competency review by the Ministerial Fellowship Committee
- a resource for the UUMA and UUA to develop relevant continuing education programs for clergy
- a resource to be used in the recruitment of prospective candidates for the ministry and as an aid in helping those candidates discern their vocation
- a framework for reviewing seminary curriculum to determine its relationship and applicability to the work of ministry as defined by those in the field
- a framework for developing learning/serving agreements for interns and their supervisors
- a resource for ministers to conduct a self-assessment and develop a plan for professional development
- a resource for ministers to assess their ministry in tandem with colleagues or laypersons
- a guide for search committees and ministries on committees looking to better understand the tasks, duties, and overall developmental trajectory of professional ministry
- a resource to provoke conversations about stewardship among clergy and laity alike.



## DUTY 1: LEADS WORSHIP

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
	<b>LEADS WORSHIP</b> (Includes tasks A,C,D,E,G,H)	Chooses a focus or theme of the service.	Maintains participants' interest and engagement in worship.	Invokes a sense of the sacred through inclusive liturgy and holistic ritual.	Leads transformational worship that moves people to take concrete actions to change their lives.
		Researches materials—including the readings for the liturgy—for use in the various aspects of the worship experience.	Assesses the make-up and particular needs of the gathered community so that the service is relevant to them in this time and place.	Selects elements that create a flow to the service relevant to the theme.	Adapts worship in the moment to meet the needs of the gathered community.



## DUTY 1: LEADS WORSHIP

Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/ Exceptional
<b>LEADS WORSHIP</b> (Includes tasks A,C,D,E, G,H)	Develops an awareness of multicultural and multigenerational approaches to worship.  Creates an order of service.	Demonstrates understanding of cultural misappropriation (e.g., uses sacred music from another culture with no attribution or explanation).  Instructs the participants regarding the flow of worship service (musicians, lay worship leaders, interns).	Creates a worship service that demonstrates multicultural and multi-generational sensitivity.  Collaborates with participants in designing the worship service.	Diversifies worship to give voice to traditionally marginalized people.  Teaches others about worship theory and design.
	Ensures worship space is prepared for worship service (e.g., properly cleaned and set up, technology functioning).	Maximizes potential of the worship space (e.g., adjusts sound, technology, lighting given the limitations of the space).	Ensures that aesthetics enhance the worship experience.	Collaborates with members and professionals to design worship spaces.




DUTY 1

## DUTY 1: LEADS WORSHIP


	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
	<b>PREACHES SERMONS, HOMILIES, AND REFLECTIONS</b>  <b>(Includes tasks B,F)</b>	Prepares sermon topic, outline, content, script.  Researches sermon topic using books, periodicals, internet, personal experience.	Reviews draft alone or with others for suggestions for improvements.  Employs a system for balancing different types of sermons (e.g., pastoral, prophetic, UU history, life issues).	Completes sermon preparation in an efficient manner (e.g., balances with other responsibilities).  Delivers sermon that is emotionally fulfilling, spiritually nurturing, and intellectually stimulating.	Adapts sermon preparation style and content in response to feedback.  Mentors others to deliver transformative sermons.
		Stays on topic.	Maintains the people's interest.	Inspires people with words and presence.	Generates transformational experience that moves people to take concrete actions to change their lives.
		Communicates clearly (e.g., makes eye contact and enunciates).	Employs gestures and voice inflection.	Engages full range of delivery skills (e.g., body movement, facial expressions, and voice).	Demonstrates facility with multiple preaching styles (e.g., extemporaneous, prophetic, pastoral).
		Maintains composure.	Presents oneself as confident and competent.	Conveys ministerial authority and presence.	Invokes a sense of the holy.




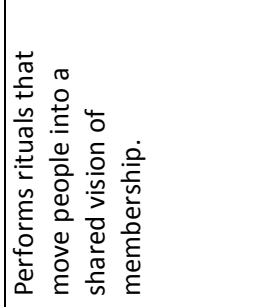
## DUTY 1: LEADS WORSHIP

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 1</b>	<b>DEVELOPS LAY WORSHIP LEADERS (Includes task I)</b>	Finds resources about lay worship leader programs.	Recruits people who have interest in and capabilities for planning or participating in worship.	Trains volunteers in the elements and leadership of worship.	Creates a ministry of lay worship leadership.
	<b>PROTECTS FREEDOM OF THE PULPIT AND PEW (Includes task J)</b>	Articulates the history, tradition, and theological basis of the concept of “freedom of the pulpit and pew.”	Educates the congregation on the history and tradition of “freedom of the pulpit and pew.”	Ensures the application and continuity of the “freedom of the pulpit and pew” (e.g., responds constructively to those who challenge the tradition).	Mentors future ministers on ministerial and lay identity and authority.


## DUTY 2: OFFICIATES RITES OF PASSAGE

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 2</b>	<b>PERFORMS RITUALS</b>  <b>(Includes tasks A, C, D, E,F)</b>	Identifies life passages (e.g., child dedications, coming of age, weddings/unions, funerals/memorial services).	Researches the religious significance of life passages.	Articulates UU theology and history relevant for life passages.	Generates theological resources and scholarship related to life passages.
	Meets with participants, family members, friends, and/or other religious professionals to plan rituals.	Guides spiritual and emotional process when meeting with family/friends.	Prepares people for rites of passage (e.g., does pre-marital counseling, involves participants in memorial services).	Helps recipients of the rituals integrate the experience into their spiritual lives.	
	Leads blessings, rites of passage, and rehearsals.	Customizes rites of passage (e.g., rehearsals, incorporates local customs, seeks collegial feedback).	Designs engaging and meaningful rites of passage.	Connects rite of passage to the universal human condition.	
	Acts as an agent of the state when appropriate (e.g., signing marriage licenses, burial documents).	Articulates awareness of local and state laws.	Discerns role in acting as an agent of the state.	Navigates local, state, and federal laws with own moral compass.	

## DUTY 2: OFFICIATES RITES OF PASSAGE

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
	<b>CELEBRATES INSTITUTIONAL MILESTONES</b>  <b>(Includes tasks B,G,H,I)</b>	Articulates the importance of membership and participation in the congregation or entity.	Works with staff/volunteers to articulate a path to membership.	Designs rituals to welcome new members.	Performs rituals that move people into a shared vision of membership.
		Identifies critical institutional milestones.	Engages congregational leadership and volunteers in planning for the ceremony.	Creates celebrations of milestones (e.g., building projects, neighborhood alliances, social justice project launches, etc.).	Integrates historic legacy with the future vision in milestone celebrations.
		Addresses the need to recognize institutional leaders and volunteers.	Seeks examples of rituals for recognizing institutional leaders and volunteers.	Designs rituals to recognize and commission leaders and volunteers (military chaplains, Board members, significant volunteers).	Instills a sense of shared ministry through ritual.

### DUTY 3: PROVIDES PASTORAL CARE AND PRESENCE

Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional
 <p><b>DUTY 3</b> <b>PROVIDES DIRECT PASTORAL CARE</b> <b>(Includes tasks A, B, I, K)</b></p>	<p>Responds in a timely manner to requests for pastoral visits.</p> <p>Employs reflective listening with those in need of pastoral care.</p> <p>Recognizes roles and needs of caregivers.</p> <p>Recognizes when an interaction needs a pastoral response.</p>	<p>Identifies pastoral needs in a variety of settings.</p> <p>Distinguishes between pastoral and therapeutic counseling.</p> <p>Refers caregivers to support groups and other specialized care.</p> <p>Responds to a wide range of pastoral opportunities.</p>	<p>Provides pastoral visits (e.g., in hospital, hospice, home, prison, etc.).</p> <p>Provides pastoral counseling that facilitates healing (e.g., grief work, trauma, addictions, sexuality concerns, hospice, chaplaincy, etc.).</p> <p>Provides direct pastoral support to caregivers.</p> <p>Maintains a consistent pastoral presence (e.g., through written notes, coffee hour, meetings, email, public events, etc.).</p>	<p>Establishes a system that facilitates quick response to pastoral needs.</p> <p>Obtains certification for specialized pastoral and spiritual care.</p> <p>Creates caregiver support groups when none exist.</p> <p>Creates pastoral opportunities and invitations (e.g., pastoral sermons, healing rituals, classes, institutional events).</p>

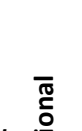


## DUTY 3


### DUTY 3: PROVIDES PASTORAL CARE AND PRESENCE

Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional
<b>PROVIDES DIRECT PASTORAL CARE</b> (Includes tasks A, B, I, K)	Assesses immediate needs in response to a trauma.	Employs community/ UU resources to help meet those needs.	Addresses trauma in wider community through ritual, worship, and communication networks.	Follows up after immediate crisis is past with pastoral tools, community resources, and specialized ministries.
	Recognizes that there are different cultural and generational needs for pastoral care (e.g., GLBTQI, marital status or single adults, gender expression, race, class, ethnicity, etc.).	Educates one's self about different cultural and generational needs for pastoral care and one's own social and cultural location.	Demonstrates multicultural and multi-generational competency in direct pastoral care.	Mentors others in developing multicultural and multi-generational competencies for direct pastoral care.


### DUTY 3: PROVIDES PASTORAL CARE AND PRESENCE

Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional			
 <p><b>DUTY 3</b></p> <p><b>SETS HEALTHY BOUNDARIES</b> (Includes tasks C, J)</p>	<p>Distinguishes between public and private communication.</p>	<p>Seeks advice about appropriate forms of communication technologies.</p>	<p>Mentors others on how to maintain pastoral presence/ boundaries with evolving communication technologies.</p>	<p>Promotes professional boundaries (e.g., teaching congregations/institutions, serving on UUMA committees).</p>			
<p>Articulates professional boundaries (e.g., UUMA, Safe Congregation, and other professional association guidelines).</p>	<p>Adheres to professional boundaries.</p>	<p>Holds self and others accountable to professional boundaries.</p>	<p>Seeks opportunities to advance the ministry of the institution at social events.</p>	<p>Recognizes the need to comport oneself in a professional manner.</p>	<p>Distinguishes between the social needs of the community and one's own needs.</p>	<p>Maintains ministerial role in the social life of the institution.</p>	<p>Holds other ministers accountable for maintaining sexual boundaries.</p>
<p>Articulates harm caused by sexual misconduct to individuals and congregation.</p>	<p>Identifies steps for handling sexual attraction to/from a congregant.</p>	<p>Maintains a plan and accountability system to address sexual attractions.</p>	<p>Holds other ministers accountable for maintaining sexual boundaries.</p>				

### DUTY 3: PROVIDES PASTORAL CARE AND PRESENCE


	<b>DUTY 3</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DEVELOPS SUPPORT SYSTEMS</b> (Includes tasks E, G, H, L)	Assesses the need for lay pastoral care teams.	Creates lay pastoral care training.	Manages lay pastoral care ministries (e.g., lay pastoral visitors, caring committees, grief groups, etc.).	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.)	Develops new models for lay pastoral care ministries.	Creates new resources for the larger community (e.g., support group for ex-offenders, food bank, loan program).
Compiles community resource directories and referral lists.	Builds relationships with local community leaders, emergency providers, and healthcare institutions.	Assesses the need for lay pastoral care teams.	Compiles community resource directories and referral lists.	Builds relationships with local community leaders, emergency providers, and healthcare institutions.	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.)	Creates new resources for the larger community (e.g., support group for ex-offenders, food bank, loan program).

## DUTY 4: ENCOURAGES SPIRITUAL DEVELOPMENT


	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 4</b>	<b>PROVIDES RELIGIOUS EDUCATION FOR ALL AGES</b>  <b>(Includes tasks A, B, G)</b>	Articulates religious education philosophy and history.	Incorporates Unitarian Universalist values into religious education.	Integrates religious education into all aspects of ministry (e.g., preaches on faith formation, leads reflection following social justice effort).	Develops new and transformative religious education practices.
	Demonstrates knowledge of current curricula.	Designs a religious education program in collaboration with volunteers and staff.	Directs religious education program for all ages.	Collaborates with other congregations and faith communities to create new resources/curricula for religious education.	
	Researches ideas for appropriate multicultural and multigenerational events and services (e.g., learns from other faith communities).	Creates a calendar of multicultural and multigenerational events and services (e.g., Earth Day service project, Dia de los Muertos).	Leads events and services that promote multicultural and multi-generational community and learning.	Models a multicultural and multigenerational approach to religious education and all aspects of ministry.	




## DUTY 4: ENCOURAGES SPIRITUAL DEVELOPMENT

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 4</b>	<b>PROVIDES SPIRITUAL GUIDANCE</b>  (Includes tasks C, D, E, F, J and 7A)	Articulates one's own spiritual practice (e.g., prayer, meditation, journaling, exercise).	Maintains a personal spiritual practice.	Integrates one's personal spiritual practice into one's ministry.	Teaches others how to develop and maintain their own spiritual practices.
	Familiarizes self with spiritual formation resources (e.g., Spiritual Directors' network, <a href="http://www.spiritualityandpractice.com">www.spiritualityandpractice.com</a> ).	Builds skills for spiritual guidance.	Provides direct spiritual guidance to support individual faith journeys.	Obtains certification as a spiritual director or practitioner.	
	Participates in spiritual practice classes, retreats and pilgrimages.	Researches best practices in leading spiritual practice classes, retreats, and pilgrimages.	Leads spiritual practice classes, retreats, and pilgrimages.	Develops leaders and teachers of spiritual practice classes, retreats, and pilgrimages.	


## DUTY 4: ENCOURAGES SPIRITUAL DEVELOPMENT

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/ Exceptional</b>
<b>DUTY 4</b>	<b>HELPS PEOPLE INTEGRATE THEIR RELIGIOUS/SPIRITUAL PAST INTO THEIR UNITARIAN UNIVERSALIST IDENTITY</b>	Demonstrates awareness of different religious orientations and historical traditions.	Reframes religious language, images, and symbols from their past to be meaningful in a new way.	Provides individuals with the tools to deconstruct, reframe, and reconstruct religious traditions and language from their past.	Mentors other ministers in helping people reframe their religious/spiritual past.
	<b>(Includes tasks H, I)</b>	Demonstrates knowledge of UU history, polity.	Introduces wisdom and inspiration of Unitarian Universalism through worship and religious education.	Provides avenues for deepening Unitarian Universalist identity.	Advances scholarship in Unitarian Universalist history and polity as it relates to faith development.


## DUTY 5: WITNESSES TO SOCIAL JUSTICE IN THE PUBLIC SQUARE

 <b>DUTY 5</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>LEADS INSTITUTION TO PARTICIPATE IN SOCIAL CHANGE</b> <b>(includes tasks A, B, C, D, H, I, J, K, L)</b>	Educates oneself around social justice issues through a variety of resources and lenses.	Raises awareness of local and global social justice issues within the congregation and/or community.	Inspires a prophetic response from the congregation or community to social justice issues (e.g., social service, public witness, advocacy).	Creates structures to sustain social justice efforts.	
	Builds individual relationships with secular and religious social justice leaders.	Joins existing alliances to address social justice issues.	Leads congregation or community to join coalitions to act on social issues.	Builds new alliances to address social justice issues.	
	Demonstrates familiarity with the prophetic history of Unitarian Universalism.	Connects the history of UU engagement with social justice to current issues.	Grounds the call to social justice work in Unitarian Universalist theologies.	Creates new scholarship connecting UU social justice and theology to faith formation.	
Evidences familiarity with emerging communication technologies.	Experiments with diverse media to communicate faithful stands/perspectives on social justice issues.	Develops a communication plan employing diverse media to maximize social justice impact.	Teaches others to advance social justice using emerging communication technologies.		


## DUTY 5: WITNESSES TO SOCIAL JUSTICE IN THE PUBLIC SQUARE

	<b>DUTY 5</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
		<b>BUILDS THE BELOVED COMMUNITY</b> <b>(Includes tasks E, F, G)</b>	Recognizes the systemic impact of institutionalized racism, sexism, ageism, heterosexism, classism, privilege, etc.	Leads institution in ongoing learning related to issues of privilege and power.	Connects social justice work to anti-oppressive, multicultural vision of the beloved community.	Confronts societal inequities related to power and privilege (e.g., leads social justice organizations, leads civil disobedience, creates legislative change).
			Familiarizes self with local interfaith resources and leaders.	Engages in interfaith dialogue and community.	Promotes public dialogue across religious and values-based differences.	Creates new opportunities for interfaith understanding to promote a just and compassionate society.


## DUTY 6: LEADS ADMINISTRATION

 <b>DUTY 6</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>GUIDES THE MISSION AND STRATEGIC PLANNING</b> <b>(Includes tasks A, E, H)</b>	<p>Articulates the value and importance of mission and strategic planning in the life of an institution.</p> <p>Assesses the need for a strategic planning process.</p> <p>Assesses adequacy of institution's current policies and procedures.</p> <p>Analyzes processes currently governing internal and external communications.</p> <p>Identifies media resources and technology to promote the mission of the institution (e.g., social media, local news outlets).</p>	<p>Leads a collaborative process for creating a mission statement.</p> <p>Initiates a strategic planning process that integrates the spiritual values of the institution.</p> <p>Ensures development of coherent policies and procedures (e.g., safety and security, personnel, building use, etc.).</p> <p>Creates communications processes.</p> <p>Demonstrates knowledge of media strategies and techniques.</p>	<p>Focuses the institution's resources and programs to fulfill the mission.</p> <p>Guides the institution to implement its strategic plan.</p> <p>Implements policies and procedures in compliance with local, state, and federal laws.</p> <p>Manages internal and external communications to enhance the mission of the institution.</p> <p>Promotes the values of Unitarian Universalism through technology and the media.</p>	<p>Encourages a shared sense of mission.</p> <p>Establishes strategic planning as an ongoing practice of the institution.</p> <p>Aligns policies and procedures with religious values.</p> <p>Leads process to evaluate effectiveness of internal and external communication processes and strategies.</p> <p>Creates new opportunities to express UU values through emerging technologies and the media.</p>	


## DUTY 6: LEADS ADMINISTRATION

 <b>DUTY 6</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>MANAGES PROFESSIONAL STAFF AND VOLUNTEERS</b>  <b>(Includes tasks B, C, D, I, K)</b>	<p>Defines tasks, job descriptions, expectations, and lines of authority.</p> <p>Works collaboratively with staff to create short- and long-term goals.</p> <p>Plans classes, events, and public programs that are in line with the organization's mission.</p>	<p>Supervises professional and volunteer staff to do their work effectively.</p> <p>Schedules regular meetings to discuss work plans, progress toward goals, and challenges.</p> <p>Develops human resources to carry out programs and resources that will ensure their success.</p>	<p>Empowers professional and volunteer staff to work independently and collaboratively.</p> <p>Evaluates performance of professional and lay staff based upon agreed upon work goals.</p> <p>Ensures quality and continuity of programming in support of the mission.</p>	<p>Creates ministry teams of professional and volunteer staff.</p> <p>Conducts regular evaluation of whole institutional system.</p> <p>Shares best practices and programs with wider UU communities and partners.</p>	

## DUTY 6: LEADS ADMINISTRATION

Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional
 <p><b>DUTY 6</b></p> <p><b>MANAGES PROFESSIONAL STAFF AND VOLUNTEERS</b> (Includes tasks B, C, D, I, K)</p>	<p>Familiarizes self with resources for lay leadership development.</p> <p>Demonstrates knowledge of governance systems and the role of the minister.</p> <p>Articulates understanding of conflict management theories and techniques.</p> <p>Names obstacles to healthy organizational functioning, including racial, ethnic, class issues.</p>	<p>Participates in continuing education around lay leadership development.</p> <p>Determines how best to align personal skills with current governance system.</p> <p>Encourages collaboration and cooperation between those involved in conflict.</p> <p>Assesses organizational behaviors against counter oppressive values.</p>	<p>Provides opportunities for leadership development of board members, committee members, and other lay leaders.</p> <p>Collaborates with governing board in implementing effective leadership of the institution.</p> <p>Mediates conflicts with political savvy.</p> <p>Applies counter oppressive lens to leadership of institution.</p>	<p>Institutionalizes program of ongoing lay leadership development.</p> <p>Connects theology and spiritual values with governance.</p> <p>Creates opportunity for increased trust and spiritual growth from conflict.</p> <p>Encourages others to understand systems of oppression and their impact on the institution.</p>


## DUTY 6: LEADS ADMINISTRATION

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>	
<b>PROMOTES EXCELLENCE IN STEWARDSHIP</b>  <b>(Includes tasks F, G, J)</b>	Familiarizes one's self with the budget, fiscal reports, and financial policies of the institution.	Participates in the creation of the budget, fiscal reports, and financial policies of the institution.	Manages budgets, financial reports, and fiduciary responsibilities.	Develops budgets and financial reports that reflect the values/mission of the institution.	Develops a culture of stewardship and generosity.	
	Articulates an understanding and theology of stewardship.	Leads stewardship efforts (e.g., preaches, forms stewardship team, canvasses large donors, engages with consultants).	Integrates a theology of stewardship into the life of the institution.	Creates maintenance standards and building use policies (e.g., building use calendar, capital improvement budget item, etc.).	Instills a culture of pride, hospitality, and spiritual value in the facilities.	
	Demonstrates an understanding of the minister's role in stewardship of facilities.	Ensures facilities are safe, clean, and accessible.	Implements membership systems (e.g., welcoming, recruiting, maintaining statistics, integrating new members).	Guides new members to find meaning, ministry, and ownership of the mission.		
	Makes certain new members and visitors are welcomed into the congregation.	Articulates a clear path to membership.				


DUTY 6




## DUTY 6: LEADS ADMINISTRATION

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 6</b>	<b>FACILITATES MINISTERIAL TRANSITIONS (includes task L)</b>	Articulates theory of change and transition and their effects on the institution.	Prepares institution for change (e.g., town hall meetings, focus groups, sermons).	Leads institution through a healthy transition process (e.g., retirement, staff changes, illness or death).	Lifts up theological and spiritual lessons from change and transition.
		Demonstrates knowledge of interim processes and interim ministry.	Educates self and others on the value of interim ministry.	Leads interim processes, planning, and/or ministry.	Achieves certification as an accredited interim minister.


## DUTY 7: PURSUES PERSONAL RENEWAL AND PROFESSIONAL DEVELOPMENT

 <b>DUTY 7</b>	Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional
	<b>ATTENDS TO ONE'S WELL-BEING</b>  <b>(Includes tasks A, B, C, D, E, F, J, L)</b>	<p>This performance area does not warrant a division into levels of mastery. This does not diminish its importance. Below is a sample checklist of performance statements that describe actions ministers can take to maintain a balance of personal and professional life for a sustainable, happy ministry:</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Makes time for family, friends, and acquaintances.</li> <li><input type="checkbox"/> Maintains intimate or meaningful relationships (friendships, love relationships) outside of the ministry setting.</li> <li><input type="checkbox"/> Takes time off (e.g., vacations, study leave, Sabbath days, and sabbaticals).</li> <li><input type="checkbox"/> Meets as needed with therapist/counselor/spiritual director.</li> <li><input type="checkbox"/> Joins professional associations.</li> <li><input type="checkbox"/> Attends UUMA gatherings (e.g., General and District Assemblies).</li> <li><input type="checkbox"/> Maintains professional credentials and licenses.</li> <li><input type="checkbox"/> Eats a healthy diet.</li> <li><input type="checkbox"/> Visits doctors/dentists regularly.</li> <li><input type="checkbox"/> Engages in regular exercise.</li> <li><input type="checkbox"/> Gets an adequate amount of sleep.</li> <li><input type="checkbox"/> Engages in recreational, cultural, and social activities.</li> </ul>		


## DUTY 7: PURSUES PERSONAL RENEWAL AND PROFESSIONAL DEVELOPMENT

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 7</b>	<b>ATTENDS TO ONE'S WELL-BEING</b> (Includes tasks B, E, F, J, L)	Recognizes own spiritual, physical, sexual, and emotional needs.	Puts structures in place to promote personal spiritual, physical, sexual, and emotional health.	Models spiritual, physical, sexual, and emotional health.	Teaches others to maintain health and well-being.
	Recognizes the need for financial stability in one's life.	Creates a financial plan.	Manages financial security.	Cultivates personal financial generosity.	
	<b>ENGAGES IN ONGOING DISCERNMENT OF MINISTERIAL CALL</b> (Includes tasks G,M)	Articulates one's theology and call to UU ministry.	Engages in ongoing discernment process about the nature of one's unfolding call (e.g., seeks counsel from colleagues and mentors, engages in spiritual practice).	Ensures one's call is in alignment to the current ministry setting (e.g., knows when to seek new position).	Mentors others into more fully living their call to ministry.
	<b>PARTICIPATES IN CONTINUING EDUCATION</b> (Includes tasks H, I, K)	Maintains a professional plan that includes study, reflection, and ongoing learning.	Engages in practical learning opportunities (e.g., takes classes and seminars, participates in a study group).	Integrates new knowledge and skills into ministry.	Mentors others around newly acquired skills.
		Demonstrates knowledge of power dynamics based on race, class and privilege.	Participates in ongoing learning to address gaps in knowledge of systems of oppression and racism.	Applies ongoing learning related to issues of privilege and power.	Teaches others to develop intercultural competencies.


**DUTY 8: SERVES THE LARGER UNITARIAN UNIVERSALIST FAITH**

	<b>DUTY 8</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<p><b>PROMOTES CONNECTIONS TO THE LARGER UNITARIAN UNIVERSALIST FAITH</b></p>	<p><b>(includes tasks A, E, F, G, H, I)</b></p>	<p>Participates in regional, national, and international UU gatherings.</p>	<p>Encourages participation by others in regional, national, and international UU gatherings.</p>	<p>Connects local congregation/institution to regional, national, and international UU gatherings.</p>	<p>Holds positions of leadership in regional, national, or international UU organization.</p>	<p>Recruits candidates for UU ministry.</p>
		<p>Demonstrates an understanding of the importance of installations and ordinations (e.g., attends services, articulates value within the tradition).</p>	<p>Participates in installations and ordinations (e.g., preaches, offers greetings, lays on hands).</p>	<p>Promotes UU ordained ministry in a visible way (e.g., mentoring new ministers, educating laity about their roles in ordaining and installing ministers).</p>		
		<p>Provides financial support to UU institutions and professional organizations (e.g, pays dues to the UUMA and other professional organizations, pledges to one's congregation).</p>	<p>Encourages members of the congregation/community to provide support to UU institutions and professional organizations.</p>	<p>Establishes a culture of generosity and stewardship related to the larger faith.</p>		<p>Provides leadership in stewardship efforts of the larger association (e.g., membership in President's Council, Chalice Lighters, Office of Church Staff Finances Committees).</p>



**DUTY 8: SERVES THE LARGER UNITARIAN UNIVERSALIST FAITH**

	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<b>DUTY 8</b>	<b>COLLABORATES WITH COLLEAGUES</b>  <b>(Includes tasks B, D)</b>	Maintains membership in professional ministerial organizations (e.g., UUMA, UU Society of Community Ministries).	Participates in ministerial association gatherings (e.g., UUMA Chapter and Ministry Days, Convocation).	Lives out the collegial spirit expressed in the UUMA covenant.	Provides senior leadership to professional ministerial organizations.
		Recognizes the contributions and value of other religious professionals (e.g., religious educators, musicians, administrators).	Works with other religious professionals to achieve common goals.	Leads collaborative staff teams in a spirit of shared ministry.	Advocates on behalf of other religious professionals.
		Recognizes the role of community ministry in congregational and associational life.	Educates one's self and one's congregation about the work of local community clergy.	Promotes the work of community clergy and their affiliation with the congregation.	Seeks opportunities for additional community clergy partnerships.


**DUTY 8: SERVES THE LARGER UNITARIAN UNIVERSALIST FAITH**

	<b>DUTY 8</b>	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
<p><b>HOLDS SELF AND OTHERS ACCOUNTABLE TO UUMA CODE OF CONDUCT</b> (includes task C)</p>	<p>Adheres to UUMA professional organizational guidelines.</p>	<p>Applies UUMA guidelines to relationships with colleagues and congregants (e.g., recognizes violations when they occur).</p>	<p>Follows UUMA process for addressing concerns when holding self and others accountable to professional standards (e.g., contacts Good Officer).</p>	<p>Educates others about the value and application of the UU ethical codes (e.g., serves as a Good Officer).</p>		
<p><b>ENGAGES IN SCHOLARSHIP</b> (includes tasks J, K, L)</p>	<p>Maintains a discipline of study, research, and writing.</p>	<p>Pursues higher learning (e.g., takes classes, produces papers for study groups).</p>	<p>Leads seminars, classes, workshops.</p>	<p>Writes books, dissertations, and other scholarly works that break new ground in UU theological and historical scholarship.</p>		

## DUTY 9: LEADS THE FAITH INTO THE FUTURE


	<b>Performance Area</b>	<b>Level One Basic Competence</b>	<b>Level Two Approaching Proficiency</b>	<b>Level Three Proficiency</b>	<b>Level Four Expert/Exceptional</b>
	<b>CREATES VISION FOR THE FUTURE.</b> (includes tasks A, B, J)	Identifies societal and cultural trends and their impact on Unitarian Universalism.	Assesses opportunities and challenges for Unitarian Universalism to respond to the spiritual and religious needs of a changing society.	Champions a vision of a multicultural, multi-generational, and diverse Unitarian Universalism.	Empowers others to lead the implementation of the vision of beloved community.
		Commits to regular practice of reading essays, periodicals, blogs, etc. that analyze future and contemporary trends.	Converses with other religious, industrial, and cultural leaders about social, cultural, and congregational trends.	Exhibits adaptive leadership abilities (e.g., Integrates learning, collaborates with groups outside UU, tolerates ambiguity).	Teaches trainings, seminars, workshops, and classes on religious trends and issues as they affect Unitarian Universalism.
		Articulates the value and importance of youth and young adult leadership (lay and ordained).	Promotes leadership training program/services/workshops for youth and young adults.	Provides leadership opportunities for youth and young adults.	Advocates for youth and young adult leadership at all levels of the institution/ UU Association.

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<b>EMPLOYS NEW WAYS OF OUTREACH (includes tasks D, E, F, G)</b>	Experiments with emerging media technology.	Uses a wide range of media technology to extend the ministry of the institution (e.g., YouTube, podcasts, blogs, tweeting, etc.).	Expands the boundaries of Unitarian Universalist community through the use of evolving media technology (e.g., social media, virtual community, outreach missions, etc.).	Teaches new models of Unitarian Universalist outreach.	Sows the spirit of hospitality beyond the bounds of Unitarian Universalism.
	Articulates theology and practice of spiritual hospitality.	Educates staff and volunteers about hospitality practices (e.g., avoid acronyms, talk to people you do not know, listen, answer questions, etc.).	Cultivates culture and practices of radical hospitality.	Plants new UU faith communities.	
	Articulates a variety of expressions of faith communities inside and outside Unitarian Universalism.	Studies emerging faith movements and community ministries.	Promotes new ways of expressing Unitarian Universalism (e.g., house churches, revivals, cooperatives, second sites, satellite congregations).		



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Performance Area	Level One Basic Competence	Level Two Approaching Proficiency	Level Three Proficiency	Level Four Expert/Exceptional
 <p style="text-align: center; font-size: 2em; font-weight: bold; letter-spacing: 0.5em;">DUTY 9</p> <p><b>CULTIVATES EXCELLENT CANDIDATES FOR MINISTRY</b> (Includes tasks C)</p>	<p>Articulates the joys, benefits, opportunities, responsibilities, and challenges of one's own call to ministry.</p>	<p>Encourages potential candidates for ministry.</p>	<p>Prioritizes recruitment of new ministers.</p>	<p>Develops collegial culture for recruitment of new ministers (e.g., mentoring, in care, retreats, internships, etc.).</p>
	<p>Articulates value of field education and internships.</p>	<p>Prepares institutions to be internship/learning sites.</p>	<p>Serves as a field education and/or internship supervisor.</p>	<p>Ensures institutional sustainability for field education and internship opportunities.</p>
	<p>Recognizes the value of mentorship in the development of successful ministry.</p>	<p>Develops mentoring skills (e.g., discusses mentoring with colleagues, conducts research into best practices).</p>	<p>Mentors seminarians and new colleagues to develop their potential and foster retention.</p>	<p>Develops a diversity of mentorship opportunities in ministerial chapter (e.g., mentors for individuals from historically marginalized backgrounds, community ministry, urban ministry).</p>

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<b>BUILDS ALLIANCES TO ADVANCE UNITARIAN UNIVERSALISM</b>	Cultivates relationships across multi-faith organizations and non-profits with similar values.	Sponsors events (worship, social action) in collaboration with denominationally diverse faith-based organizations and non-profits.	Promotes Unitarian Universalist values through leadership in non-profit organizations and/or interfaith alliances.	Founds groundbreaking community service organizations and faith-based coalitions.	
<b>(Includes tasks H, I)</b>	Attends UUA district, regional, and continental gatherings.	Devotes time to serving the wider Unitarian Universalism movement.	Inspires the institution to connect with and mentor other UU institutions.	Engenders new ways to live the covenantal nature of Unitarian Universalism.	
<b>ENSURES FINANCIAL SUSTAINABILITY OF INSTITUTIONS</b> <b>(Includes task K)</b>	Explores entrepreneurial approaches to financial sustainability.	Completes marketing analysis for new revenue sources in current ministry setting (may involve hiring a consultant).	Creates new revenue streams (e.g., new forms of membership, marketing of UU products).	Institutionalizes sustainable revenue streams.	



## Skills & Knowledge Required:

### Skills:

Budgeting  
Communication  
Community organizing  
Conflict Management  
Counseling  
Decision-making  
Facilitation  
Fundraising  
Homiletics  
Intergenerational relationship building  
Leadership development  
Listening  
Marketing promotion  
Multicultural competencies  
Negotiating  
Networking  
Pastoral care  
Problem solving  
Public speaking  
Research  
Writing

### Knowledge:

ARAOMC (anti-racism, anti-oppression & multiculturalism)  
Congregation systems theory  
Contemporary culture  
Counseling theories  
Current events  
Developmental theory  
Family systems theory  
History/theory of social movements  
Literature  
Organizational development  
Philosophy  
Preaching/ worship arts  
Professional ethics  
Psychology  
Religious education/ theory  
Roles & responsibilities of a UU minister  
Scriptures, story, and myth  
Sexual health  
Small business management  
Spiritual practices  
Theology  
UU history & polity  
World culture & religions

### Behaviors

#### *A successful minister is...*

Adventurous  
Agile  
Articulate  
Authentic  
Aware  
Balanced  
Compassionate  
Competent  
Confident  
Courageous  
Creative  
Curious  
Emotionally intelligent  
Entrepreneurial  
Generous  
A good listener  
Grateful  
Honest  
Humble

Humorous  
Innovative  
Inspiring  
Joyful  
Kind  
Loving  
Patient  
A person of integrity  
Playful  
Politically astute  
Practical  
A risk taker  
Spiritually mature  
Strategic  
Thoughtful  
Transparent  
Trustworthy  
Visionary  
Wise

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ASSOCIATION OF CONGREGATIONS  
25 Beacon Street, Boston, MA 02108-2800  
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