

## INTERIM ASSESSMENT MODEL

### ORIGIN AND CONTEXT

This model was created by the Transitions Department of the UUA to serve the unique context of congregations in transition between settled ministers. This model is a co-evaluation based on goals set and agreed upon in the beginning of the ministry by both the Interim Minister and the congregation's leadership, (typically the Board of Trustees or Parish Committee). This setting of goals, in itself, is a very valuable part of the process as it will often establish clarity of understanding and agreements as well as clarity in roles and responsibilities for the contracted period of service.

In this model, both the minister and congregational leadership provide some assessment and observational feedback relating to the shared ministry successfully reaching established goals. For a one year period of service by the interim, this process engages in three parts:

1. Goal setting
2. Mid-term Evaluation (6 months)
3. Final Evaluation (shortly before the end of service, but enough time that the feedback can be processed in an air of openness and mutuality).

For a two year interim, there is an additional Mid-term evaluation at approximately 14 months. The mid-term evaluation(s) create an opportunity for insight and learning. Discoveries that emerge from feedback are best re-invested into the process by re-examining the goals and making appropriate modifications. Intentional flexibility creates the necessary room for growth and change to occur – ideally for both professional and lay leaders.

Feedback from congregational leaders is consolidated into a single form with wording all contributors can agree upon. This feedback is shared with the goal of reaching understanding of all perspectives.

### BENEFITS OF THE MODEL

- Creates shared accountability in naming goals
- Asks for an understanding of shared perspectives
- Encourages flexibility, openness and creative consideration to modify goals and/or strategies.
- Ministers have been trained via the AIM program and congregations gain some support from district Settlement Reps during a period of search.
- Often gives congregations a new (sometimes their only) experience in exchanging feedback with a professional minister.
- Transitions Office expectations that a review process will be done provides a locus of accountability

### CHALLENGES OF THE MODEL

- Model is designed to be a 'time-bound' design that is driven by an identified transition. Congregations with a settled minister – and without the requirements of a transitions office - might not identify this type of process as essential.
- Settled ministries must establish their own locus of accountability for creating the structure, process and reports rather than the 'requirements' of transitions office.
- Needs enough internal authority to determine congregational goals which forms a basis for the feedback to be conducted.

**PROCESS**

The purpose of this appraisal is to provide a picture of the congregation’s progress to date toward its interim goals. The lay leadership and minister are each asked to complete an appraisal independently, to discuss the completed appraisals with one another, and to submit both to the Transitions Office. The Transitions Office will share the appraisals with the District and with the successor ministerial candidate. For the sake of the greatest possible candor, distribution of these appraisals is restricted to those authorized to receive them.

**Instructions:** In connection with each of the interim tasks, please appraise the congregation’s progress to date. Where progress is less than satisfactory, please note the steps to be taken, and by whom, to get up to speed.

The progress appraisal forms are now a part of the on-line edition of the *Interim and Consulting Ministries Handbook*. Below is the information that will be requested.

**Name of Congregation:** \_\_\_\_\_

**City and State/Province:** \_\_\_\_\_

**Name of Minister:** \_\_\_\_\_

**Date Ministry Began:** \_\_\_\_\_

**Date of Appraisal:** \_\_\_\_\_

**This appraisal is**

**by the governing board or its designee**

**Convener:** \_\_\_\_\_

**Daytime telephone:** \_\_\_\_\_

**E-mail** \_\_\_\_\_

**Were others involved in the appraisal process in addition to the governing board?**

**(e.g. Transition Team)** \_\_\_\_\_

\_\_\_\_\_

**Brief description of the process:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Note to convener:** Please seek to arrive at a consensus appraisal, in which the assessments of the individual appraisers are blended into statements with which all can agree.

**by the interim minister**

**at mid-term or**  **at the end-of-ministry**

**Have you shared this appraisal with your partner in leadership? (i.e. has the leadership shared its appraisal with the minister and vice-versa)**

**yes**

**no**

1. The congregation has . . .

a. claimed and honored its past

Progress to date:

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

b. engaged and acknowledged its griefs and conflicts.

Progress to date:

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

2. The congregation recognizes its unique identity and its strengths, needs, and challenges.

Progress to date:

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

3. The congregation

a. has a clear understanding of the appropriate leadership roles of minister(s), church staff, and lay leaders

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

b. has successfully navigated the shifts in leadership that may accompany times of transition.

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

4. The congregation makes appropriate use of District, UUA, and other outside resources.

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

5. The congregation reaches beyond the dominant culture to include the multicultural world in social service and social justice.

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

6. The congregation is in proud possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

Excellent: developmental task completed

Well on track

Satisfactory

Lagging

Unsatisfactory: serious concern here

7. Have there been difficulties experienced with or constraints put on the interim minister's carrying out the normal tasks of ministry, i.e. preaching, teaching, and pastoral care?

8. Has the interim minister been attentive to self-care and to a spiritual practice of choice?

9. Are there other areas in which the leadership has specifically requested assistance from the interim minister, either as the ministry began or later on? If so, please describe the requests and appraise the progress to date on each.

10. In your perception, how fully did the leadership inform the congregation about the Interim Ministry Program before the interim minister arrived?

11. **If a mid-term evaluation:** What would you like to see happen during the remaining months that differs from what is now occurring?

12. Please comment on the Interim Ministry *Program* (as distinct from the interim minister) as you have experienced it so far.

13. Recognizing that congregational leadership is in its truest sense a shared undertaking, what other satisfactions and dissatisfactions do you, as minister or as lay leaders, have about your role in leading the congregation during the interim period?