



Office of Clergy
Excellence

Florida Conference The United Methodist Church
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October 11, 2018

Psychological Assessment Reports - DRAFT - REVISION 3

Recently I have received several requests from DSs, mentors, and dcom chairs about how to read and interpret the psychological reports. Specifically I have been asked about what should and what should *not* be shared with the applicant. I thought it might be helpful to put together some guidelines.

When the candidate takes their psychological assessment they are asked to sign a release which states the following:

Authorization for Release of Information

Information gained in the course of the Process of Evaluation for ministry belongs to the Florida Annual Conference of the United Methodist Church (“Florida Annual Conference”). The Licensed Psychologist who will perform the evaluation (“the examiner”) is an agent of the Florida Conference. Further, your relationship with the examiner is not a treatment relationship and as such, the Florida Annual Conference, not the examiner, controls who has access to the report. The Florida Conference does not permit any copies of the report to be given to the applicant.

1. *I understand that the Process of Evaluation for ministry includes a psychological assessment. I understand that at the conclusion of the Assessment, a written report is to be prepared, or has been prepared, which will contain conclusions, opinions, observations, or recommendations by a licensed mental health professional conducting the examination.*
2. *I hereby grant release of access to the assessment report, subject to the terms herein specified.*
3. *I authorize the mental health professionals involved in the assessment to disclose the written assessment report to designated representatives of The Florida Annual Conference, including but not limited to, the district group mentors, the district superintendent, the district committee on ministry, the Board of Ordained Ministry, and The Office of Clergy Excellence of The Florida Annual Conference. I authorize the mental health professionals involved in the assessment to discuss the written assessment report with the designated representatives of the Florida Annual Conference as enumerated above.*
4. *I understand that the Florida Annual Conference will have the right to control the use and disclosure of information regarding the assessment during consideration of my application, with designated persons listed above, on a “need to know” basis. Should I terminate the candidacy process, the information will be retained in accordance with the personnel policies of the Florida Annual Conference.*

5. I understand that disclosure of psychological information on a “need to know” basis may require disclosure beyond the board of ordained ministry, to the executive session of the Annual Conference.

6. Upon release by the examiner, all records will be maintained pursuant to policies of the Florida Annual Conference on record retention, and policies designed to protect the privacy of candidates from unnecessary disclosure of otherwise personal information. However, unless otherwise specified, the raw data from any psychological tests or inventories which the licensed psychologist has completed remains the sole property of the examiner and only his or her opinion as expressed in the assessment report will be released to the designated agents of The Florida Annual Conference. The examiner will maintain the raw data or any other material about me as confidential mental health records, pursuant to law of the jurisdiction in which the examination is conducted.

7. I understand that, in addition to the Florida Annual Conference’s access to this information for its selection decisions, the General Board of Higher Education and Ministry (GBHEM) and the Florida Annual Conference of the United Methodist Church may also use this information as part of ongoing research. I understand that my confidentiality will be protected in such research.

8. I agree that if any portion of this Authorization for Release of Information is found by a court to be unenforceable for any reason, the remainder of this consent and authorization for release shall remain valid and in full force and effect.

9. I have carefully read this release form and fully understand its contents. I sign it of my own free will. I understand that I may consult with an attorney of my choice before signing this document. I acknowledge that I have had the opportunity to ask questions concerning the contents of this form and any such questions have been answered to my satisfaction. Nonetheless, in agreeing to sign this document, I have not relied upon any statements or explanations made by the Florida Annual Conference or its ministers, officers, employees, volunteers, agents or legal representatives, any personnel and entities involved in conducting the assessment and their officers, directors, employees, volunteers, agents, heirs, administrators, successors, assigns or legal representatives.

By signing this release form I am stating that I have read and understand each paragraph of this Authorization for Release of Information, and that I release the interpretation of my psychological assessment to the Florida Annual Conference in order to facilitate discussion of my candidacy and potential ministry with the Florida Conference of The United Methodist Church.

Name

Address

Phone Number

Email

Date of Signature

GUIDELINES FOR INTERPRETING MAS REPORTS

1. The psychological reports prepared by one of our two Ministerial Assessment Specialists (MASs), Dr. Jalazo and Dr. Gomez with Rick Armstrong, are **the property of the Florida Conference utilized by the Board of Ordained ministry and its Committees to discern fitness for ministry.** These forensic fitness-for-duty reports are prepared with the understanding that **The Florida Conference, not the applicant, is the client.**
2. There are legal and clinical concerns if the applicant were to be given a copy of a report not intended for them. Misunderstanding a report not intended for them could cause psychological harm. This could also expose the Conference and the MAS's to potential legal liability. **Under no circumstances should the applicant be given either a physical or an electronic copy of the report.**
3. The MASs will prepare a summary report in the form of a **Feedback Letter** addressed to the Conference, which may be shared verbally with the candidate, but again, **under no circumstances should a copy of this summary or the full report be given to the candidate.** We know that some other Conferences do provide copies of the reports to their candidates, but laws differ from state to state and our Risk Management department has determined that we may not provide copies to our candidates.
4. **The full report prepared for the Conference should NOT be read in its entirety to the applicant. It is preferable for the mentors to summarize the feedback given by the MAS utilizing the Feedback Letter provided by the MAS.** The full report is provided to the mentor, the DS, the District Committee on Ordained Ministry and the Board of Ordained ministry to provide context and a broader understanding of the candidate's fitness for ministry. There is value in giving the candidate some feedback so that they know what they will need to work on and also be better prepared for what might be discussed at their District Committee meeting. The Feedback Letter summary provided verbally only should accomplish this at the group mentoring stage. It is the responsibility of the District Committee on Ordained Ministry (DCOM) to make recommendations for growth assignments based on information gleaned from the full report.
5. Recently we have made an adjustment to our Assessment process, asking the MAS's NOT to duplicate information provided in the Personal Data Inventory (PDI) or in any spiritual or auto biographies (if any). However, in reviewing the PDI the MASs may make significant psychological observations on such things as an erratic employment history or serial marriages or other such items pertinent to their psychological assessment of the applicant. The PDI should, therefore, be read in conjunction with the MAS report. **The PDI will be provided to the District Committees and the Board along with psychological report and Feedback Letter.**
6. If a DCOM or the BOM wishes the applicant to work with a therapist or clinical professional using the full psychological report, the candidate may send a **notarized request to Holly Finley at hfinley@flumc.org stating specifically the name of the clinician, their address and other contact information to whom the report should be released.** **The report is released to the clinician with the understanding that no physical or electronic copy of the report may be provided to the applicant.**
7. In 2017, the Board of Ordained Ministry developed an outline of what we would like to see in each psychological report. A copy of this outline is included below as an Appendix to this report. This outline was developed in order to make the reports more uniform, to include psychological insights from the MASs, as opposed to simply including information provided by the applicant perhaps through a spiritual biography or auto-biography or in their PDI, and to give the DCOMs feedback on specific areas of concern and questions they might wish to ask the applicant.
8. The outline for the report now includes an initial summary of whether there were **no concerns, some concerns or serious concerns** regarding the particular applicant's fitness for ministry.
9. If the report shows **some concerns**, these will be areas that the Dcom members will want to pay particular attention to when crafting Growth Assignments.
10. If a report identifies **serious concerns**, the following guidelines should be considered when providing feedback to the applicant. We suggest that if there are two mentors in the district, that **both** mentors should be present to provide the feedback to the applicant. One should be an observer and one should be the primary spokesperson. **The report should NOT be read in its entirety to the applicant and if a diagnosis is noted in the report, this should NOT be shared with the candidate.** It is preferable for the mentors to summarize the feedback given by the

MAS utilizing the summary provided in the Feedback Letter. Under no circumstances should the applicant be given either a physical or electronic copy of the report.

11. If the applicant who receives “serious concerns” is already serving a church, it is recommended that the District Superintendent (DS) also be present for the feedback session but that the mentors take the primary lead in providing the feedback.
12. Copies of any MAS report with **serious concerns** will also be provided to both our Risk Management and our HR departments at the Conference center.
13. When the mentors are giving feedback to the applicant, they should be reminded that **the MAS’s report is compiled based on the applicant’s own responses to the MMPI2, PAI and Incomplete Sentences tests.** (The MASs are not making this stuff up!) The applicant’s responses have been compared to and normed against the thousands of people who have taken these tests in the past.
14. **With regard to the MMPI2 and PAI, it is possible that certain clinical scales may be elevated when compared to the norms.** These elevations may indicate the presence of a personality disorder or other clinical psychological diagnosis. The MASs would confirm any potential diagnosis through observations made during the clinical interview as well as considering information provided by the applicant’s references.
15. **If certain clinical scales are elevated,** the MAS’s can indicate ways in which persons with this elevation typically act. This does not mean that the applicant necessarily evidences all of these traits or behaviors. This would need to be verified through observations made by the MAS in the clinical interview and by other data and information made available to the MAS.
16. **The MAS’s report is only one important piece of information regarding the applicant** and should be considered in light of the mentor’s, DS’s and DCOM members’ interactions with the applicant, along with information gleaned from their written application and oral interview.
17. There have been several concerns expressed about cultural and contextual differences and their impact on the outcomes of the psychological testing. As of this writing, the MMPI2 is available in and normed for Spanish, French, and Korean, in addition to English. Applicants are asked to indicate if they wish to take the tests in a language other than English. One of our MASs is Latina and both MASs are cognizant of and knowledgeable about the impacts of cultural and contextual diversity on the testing. They will make note of any concerns they may have regarding the cultural validity of the responses.
18. If you should ever have any concerns about how to interpret the MAS report, or how to provide feedback to the applicant, or have questions prior to a DCOM meeting, please contact Rev. Sara McKinley at 954-873-7825. She will be happy to assist you.

Respectfully submitted,

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Appendix A

**Florida Conference of the United Methodist Church
Office of Clergy Excellence
Info needed for Psychological Assessment Reports**

Client name:

Testing date:

Interview date:

Report date:

MAS name:

Requested by:

Applying for:

Assessment methods and sources of information:

Personal History or Spiritual Autobiography, if requested by MAS

Personal Data Inventory (PDI)

Incomplete Sentences

Personal References: (4), relationships

MMPI 2

PAI

Clinical Interview

Other sources:

Conclusions:

Based on all the data available and as summarized and analyzed below, it is this evaluator's opinion that there are **no concerns/some concerns/serious concerns** regarding the candidate's ability to perform in the ministry. Please see Analysis section for further clarification.

Relevant Background (from Personal History, PDI and Interview - do not duplicate information from these sources, but make note any relevant issues or concerns)

Family of Origin

Marital History

Medical History

Employment History

Academic History

Spiritual History

Strengths (from objective testing, References, Interview)

Areas for Growth/of concern (from objective testing, References, Interview)

Fitness for Ministry/Ministry potential/Psychological Readiness for Ministry (from objective testing, References, Clinical Interview)

Assessment of Risks for Ministry in the areas of: (if applicable)

Depression

Anxiety

Stress management

Anger/Violence

Substance abuse

Self care/Boundary issues

Sexual misconduct

Authority issues

Work addiction

Personal management and finances

Risk factors for burnout

Self image and sexuality

Addiction potential/history of/problems with substance abuse:

Alcohol

Drugs
Gambling
Pornography
Tobacco
Food
Other:
Legal and financial management history
Mental Health
Critical Incidents and losses
Behavioral observations
Attitude towards evaluation
Disabling psychopathology
Possible problem areas:
Overall Estimated Ministry Risk:

Assessment of Ministry Skills:

Thinking/reasoning capacity
Occupational Fit for Ministerial Role
Personality considerations
Interpersonal Effectiveness
Interpersonal boundaries
Impulse control
Capacity to change
Preferred work pace and style
Risk taking
Entrepreneurial skills/experience
Ability to deal with details
Leadership potential
Acceptance of supervision
Empathy skill level
Overall emotional stability
Overall Adjustment Estimation

Evaluation of Emotional Intelligence in the areas of: (from objective testing, References, Interview)

Self Awareness
Self Management
Social Awareness
Relationship Management

Summary of:

MMPI Results:
PAI Results:
Clinical Interview
Incomplete Sentences:
Personal References:
Overall Findings

Diagnoses, if any

Recommendations

Suggested questions to be discussed with the candidate by the Committee developed out of areas of growth/ psychological concerns for the purposes of examining and supporting the candidate.

- 1.
- 2.
- 3.