

EPISCOPAL CANDIDATES ASSESSMENT CHECKLIST

Purpose: Episcopal candidates must possess skills and values that are essential for effective Episcopal leadership. The checklist provides questions in four foundational areas that any episcopal leader in the UMC shall exhibit. Please use checklist below to assess the candidate's skill and gifts. The four foundational areas are: Leadership, Experience, Spirituality, and Relationships. You may add other areas or questions that are important to your constituency.

How to use the tool: Use one checklist for each candidate. Answer each question by marking the appropriate boxes. It is recommended that a comparison is done once a form is completed for every episcopal candidate.

Name: _____

ADMINISTRATION/LEADERSHIP

- | | | | | |
|----|---|-----|----|----------|
| 1. | Does the person know and can interpret the Book the Discipline? | Yes | No | Not Sure |
| 2. | Does the person understand there are procedures that need to be followed in different circumstances? | Yes | No | Not Sure |
| 3. | Does the person understand the judicial decisions/rulings? | Yes | No | Not Sure |
| 4. | Does the person have proven effective local church experience? | Yes | No | Not Sure |
| 5. | Does the person have the ability to present a vision and strategy which people choose to follow? | Yes | No | Not Sure |
| 6. | Does the person have the ability to listen to others, especially those who do not hold the same perspectives? | Yes | No | Not Sure |
| 7. | Does the person know how to handle "fair processes"? | Yes | No | Not Sure |

EXPERIENCE

8.	Does the person have a history of empowering and supporting collaborative team efforts?	Yes	No	Not Sure
9.	Does the person have experience working with capital and operating budget?	Yes	No	Not Sure
10.	Does the person have the have a history of increasing diversity and promoting inclusion within their setting?	Yes	No	Not Sure
11.	Does the person have experience with handling misconduct issues with his/her/their staff or peers?	Yes	No	Not Sure
12.	Has the person worked with people who are of a different race/ethnicity, socio-economic background, gender, sexual orientation, age, abilities, class, nationality, etc?	Yes	No	Not Sure

SPIRITUALITY

13.	Does the person have a deep spiritual grounding?	Yes	No	Not Sure
14.	Does the person have humility and integrity?	Yes	No	Not Sure
15.	Does the person have history of discerning God's direction in the midst of chaos?	Yes	No	Not Sure
16.	Does the person exhibit shepharding presence?	Yes	No	Not Sure
17.	Has the person been prophetic during times of uncertainty?	Yes	No	Not Sure

RELATIONAL

18.	Does this person practice good self-care?	Yes	No	Not Sure
19.	Does this person have clear boundaries?	Yes	No	Not Sure
20.	Does this person have a good balance between personal and professional life?	Yes	No	Not Sure
21.	Does the person need to be liked by those around him/her/them?	Yes	No	Not Sure
22.	Does the person have skills to develop bridges across differences (age, gender, race/ethnicity, abilities, class, tribe, nationality, socio-economics, etc)?	Yes	No	Not Sure

STRENGTHS OF THE CANDIDATE

CHALLENGES OF THE CANDIDATE

SUMMARY
