

Assessment Tool Description and Definitions

Description

We are creating an assessment tool to help measure student readiness for ACPE CPE during the admissions process.

A formula outlined by Howard McClusky, called "The Margin in Life," was chosen as our guiding theory. McClusky's theory states that adults grow and mature through the interaction of two key components.

The first is load, the demands made upon the individual by self and society, that draw on the person's energy or vitality. Examples of load would include such things as work responsibilities, family commitments, personal goals and emotional stressors.

The second component of life, according to McClusky, is power, a combination of internal or external resources that the individual has available to sustain the load. Examples of power would include abilities, aptitudes, skills, possessions, position, and support network.

By placing Load as a numerator and Power as a denominator, a ratio is created that describes the person's current performance. When this ratio is subtracted from 1 (100%), which would be total capacity of a human being, a "margin in life" is exposed. For McClusky, this margin in life, or vitality remaining after carrying the current load, needed to be substantial enough (between .30 and .70) for the individual to be able to take on an additional challenge.

McClusky's Margin in Life Model Formula and Terms

$$1.00 - \frac{\text{Load}}{\text{Power}} = \text{MIL}$$

1.00 - total capacity

Load - internal load (personal goals and expectations, values, attitudes, chosen commitments and responsibilities) and
- external load (work, social obligations, stage of life/critical periods, family)

Power - internal and external resources (ie. abilities, sense of discovery, willingness to learn, possessions, position, allies, etc.) which a person can command in coping with Load.

MIL - (Margin In Life) - the vitality remaining when the load to power ratio is subtracted from 100%.
- the variety of alternatives available to choose

Application of this model to CPE indicates that excess power over load is needed for a student to successfully complete an additional commitment like CPE.

Assessment Tool Draft 9b: Definition of Our Terms

The form has been designed using the ACPE standards as a base. Written final evaluations essentially follow this same pattern. We have simply added McClusky's formula as a helpful frame of reference. As you review these terms, think about how much of a load and of a power source they are for the person:

Presence - Personal appearance and poise during interview.

Personal History - Family background and religious history.

Educational Readiness - Motivation and openness to learning.

Ability to Learn in a CPE Setting - Learning style, education issues, understanding of the process of education.

Personal Vision - Educational goals and expectations of CPE.

People Skills - Ability to relate to people, openness in sharing feelings, sensitivity, and level of maturity.

Previous CPE Experience - Type and usefulness of experience, growth areas identified.

Previous Pastoral Experience - Type and usefulness of experience, growth areas identified.

Personal Resources Available - Finances, support network, health.

Existing Commitments - Living situation, job, community commitments.

Best results will be obtained by using this tool after the student interview, using interview notes, and application information. The supervisor summary report emerges well from this completed tool.

Assessment Tool Draft 9b

Please rate each student on these ten categories, describing the level of load and power each item brings to the student. If the area does not apply to this particular student, mark N/A. From this chart a recommendation should then be possible, rating the student's load/power ratio. On this scale 1 is low, 10 is high. Ratings do not need to offset each other (eg. if load is 3, power does not necessarily equal 7). Both Load and Power have a positive and negative side:

Load (commitments) Power (resources)
10 9 8 7 6 5 4 3 2 1 1 2 3 4 5 6 7 8 9 10
(high) (low) (low) (high)
negative positive negative positive

Area of Assessment:	Load	Power	N/A		
Presence	Rate personal appearance and poise during the interview, allowing for cultural/ethnic differences, and then assess Presence numerically as to Load and Power.				
Punctuality	Poor	Fair	Good	Excellent	N/A
Appearance	Poor	Fair	Good	Excellent	N/A
Poise	Poor	Fair	Good	Excellent	N/A
Eye Contact	Poor	Fair	Good	Excellent	N/A
Emotionally Available	Poor	Fair	Good	Excellent	N/A
Tone/verbal inflection	Poor	Fair	Good	Excellent	N/A

Presence	Load	Power	N/A
	10 9 8 7 6 5 4 3 2 1	1 2 3 4 5 6 7 8 9 10	
	high	low	
	(timid)	(easy going)	
		low	
		high	
		(detracting)	
		(appropriate)	

Personal History	Load	Power	N/A		
	Rate family background, religious history and personal growth, then assess Personal History numerically as to Load and Power.				
Emotional Health	Poor	Fair	Good	Excellent	N/A
Level of Function	Poor	Fair	Good	Excellent	N/A
Interpersonal Availability	Poor	Fair	Good	Excellent	N/A
Theological Formation	Poor	Fair	Good	Excellent	N/A
Takes Responsibility	Poor	Fair	Good	Excellent	N/A
English Competency	Poor	Fair	Good	Excellent	N/A

Personal History	Load	Power	N/A
	10 9 8 7 6 5 4 3 2 1	1 2 3 4 5 6 7 8 9 10	
	high	low	
	(hindering)	(freeing)	
		low	
		high	
		(poor base)	
		(good base)	

Educational Readiness Rate openness and readiness to learn, then assess numerically as to Load and Power.

Physical Health	Poor	Fair	Good	Excellent	N/A
Religious Perspective	Poor	Fair	Good	Excellent	N/A
Psychological Health	Poor	Fair	Good	Excellent	N/A
Integration of Learning	Poor	Fair	Good	Excellent	N/A
Curiosity/Interest	Poor	Fair	Good	Excellent	N/A
Openness to Learn	Poor	Fair	Good	Excellent	N/A

Educational Readiness	Load					Power					N/A										
	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10	
	high					low					high										
	(closed)					(very open)					(poor base)					(good base)					

Ability to Learn in this CPE Setting Circle the appropriate response below as to a fit with my leadership style, then assess numerically as to Load and Power.

Open to My Supervision	Poor	Fair	Good	Excellent	N/A
Abstract Thinker	Poor	Fair	Good	Excellent	N/A
Ability to be Reflective	Poor	Fair	Good	Excellent	N/A
Flexible	Poor	Fair	Good	Excellent	N/A
Cooperative	Poor	Fair	Good	Excellent	N/A
Teachable by Me	Poor	Fair	Good	Excellent	N/A

Ability to Learn in this CPE Setting	Load					Power					N/A										
	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10	
	high					low					high										
	(unavailable)					(available)					(low affect)					(curious)					

Personal Vision Rate the fit of personal style and functioning to taking CPE, then assess numerically as to Load and Power.

Assertiveness	Poor	Fair	Good	Excellent	N/A
Self Awareness	Poor	Fair	Good	Excellent	N/A
Goal Oriented	Poor	Fair	Good	Excellent	N/A
Expectations	Poor	Fair	Good	Excellent	N/A
Motivation	Poor	Fair	Good	Excellent	N/A
Achievement of Goals	Poor	Fair	Good	Excellent	N/A

Personal Vision	Load					Power					N/A										
	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10	
	high					low					high										
	(required)					(desire CPE)					(passive)					(motivated)					

People Skills Rate how the individual relates to people, then assess numerically as to Load and Power.

Accurate Listener	Poor	Fair	Good	Excellent	N/A
Sense of Presence	Poor	Fair	Good	Excellent	N/A
Warmth Given	Poor	Fair	Good	Excellent	N/A
Sensitivity Shown	Poor	Fair	Good	Excellent	N/A
Maturity Expressed	Poor	Fair	Good	Excellent	N/A
Empathy Shown	Poor	Fair	Good	Excellent	N/A

	Load					Power					N/A									
People Skills	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10
	high					low					high									
	(tolerates people)					(loves p.)					(none)					(excellent)				

Previous CPE Experience Rate the prior value of CPE units taken, then assess numerically as to Load and Power.

Progress with Growth Areas	Poor	Fair	Good	Excellent	N/A
Personal Satisfaction Level	Poor	Fair	Good	Excellent	N/A
Processing Ability	Poor	Fair	Good	Excellent	N/A
View of Past Supervisor(s)	Poor	Fair	Good	Excellent	N/A
Group Participation	Poor	Fair	Good	Excellent	N/A
Completion Standing	Poor	Fair	Good	Excellent	N/A

	Load					Power					N/A									
Previous CPE Experience	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10
	high					low					high									
	(neg.)					(pos.)					(stifling)					(empowering)				

Previous Pastoral Experience Rate the student's effectiveness and current view of ministry, based on their experience, and then assess numerically as to Load and Power.

Management of Crisis	Poor	Fair	Good	Excellent	N/A
Pastoral Care Given	Poor	Fair	Good	Excellent	N/A
Attitude toward Ministry	Poor	Fair	Good	Excellent	N/A
View of this Experience	Poor	Fair	Good	Excellent	N/A
Current Standing	Poor	Fair	Good	Excellent	N/A
Sense of Call	Poor	Fair	Good	Excellent	N/A

	Load					Power					N/A									
Previous Pastoral Experience	10	9	8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8	9	10
	high					low					high									
	(burdensome)					(enjoyable)					(stifling)					(empowering)				

Personal Resources Available

Rate the student's abilities and level of support for taking CPE, then assess numerically as to Load and Power.

Time Available	Poor	Fair	Good	Excellent	N/A
Accessibility	Poor	Fair	Good	Excellent	N/A
Financial Support	Poor	Fair	Good	Excellent	N/A
Personal Support	Poor	Fair	Good	Excellent	N/A
Personal Boundaries	Poor	Fair	Good	Excellent	N/A
Cooperative Setting	Poor	Fair	Good	Excellent	N/A

Personal Resources Available	Load	Power	N/A
	10 9 8 7 6 5 4 3 2 1	1 2 3 4 5 6 7 8 9 10	
	high	low low	high
	(all used)	(more room)	(max pot.) (more potential)

Existing Commitments

Circle how taking CPE now would fit into current commitments, then assess numerically as to Load and Power.

Living Situation	Poor	Fair	Good	Excellent	N/A
Job Compatibility	Poor	Fair	Good	Excellent	N/A
Timing of taking CPE now	Poor	Fair	Good	Excellent	N/A
Community Involvements	Poor	Fair	Good	Excellent	N/A
Denominational View	Poor	Fair	Good	Excellent	N/A

Existing Commitments	Load	Power	N/A
	10 9 8 7 6 5 4 3 2 1	1 2 3 4 5 6 7 8 9 10	
	high	low low	high
	(many)	(few) (full plate)	(energy left)

Totals (total load _____) (total power _____)

Rate the student's margin of life based on their total load and power scores:

Margin of life = 1.00 - _____ (total load score) divided by _____ (total power score)

How does the student's outcome on this assessment tool correlate with your trained intuitive sense of how you felt about the student?

poor fair average good excellent

Comment on any discrepancies:

Supervisor satisfaction with accuracy of this assessment tool: (circle)

poor fair average good excellent

Assessment Tool Draft 9c – Definition of Our Terms

The form has been designed using the ACPE standards as a base. Written final evaluations essentially follow this same pattern. As a supervisor, use your trained intuition to assess the student's readiness for ACPE, based on application and interview material. For the ten ACPE areas of assessment a Poor/Fair/Good/Excellent scale is used.

Presence - Personal appearance and poise during interview.

Personal History - Family background and religious history.

Educational Readiness - Motivation and openness to learning.

Ability to Learn in a CPE Setting - Learning style, education issues, understanding of the process of education.

Personal Vision - Educational goals and expectations of CPE.

People Skills - Ability to relate to people, openness in sharing feelings, sensitivity, and level of maturity.

Previous CPE Experience - Type and usefulness of experience, growth areas identified.

Previous Pastoral Experience - Type and usefulness of experience, growth areas identified.

Personal Resources Available - Finances, support network, health.

Existing Commitments - Living situation, job, community commitments.

Best results will be obtained by using this tool after the student interview, using interview notes, and application information. The supervisor summary report emerges well from this completed tool.

Assessment Tool Draft 9c

Please rate each student on these ten categories. If the area does not apply to this particular student, mark N/A. From the scale at the end of the assessment tool, a recommendation is possible, rating the student's readiness for CPE.

Area of Assessment

Presence Rate personal appearance and poise during the interview, allowing for cultural/ethnic differences, and then circle the average of your responses with the numerical value.

Punctuality	Poor	Fair	Good	Excellent	N/A
Appearance	Poor	Fair	Good	Excellent	N/A
Poise	Poor	Fair	Good	Excellent	N/A
Eye Contact	Poor	Fair	Good	Excellent	N/A
Emotionally Available	Poor	Fair	Good	Excellent	N/A
Tone/verbal inflection	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Presence

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Personal History Rate family background, religious history and personal growth, and then circle the average of your responses with the numerical value.

Emotional Health	Poor	Fair	Good	Excellent	N/A
Level of Function	Poor	Fair	Good	Excellent	N/A
Interpersonal Availability	Poor	Fair	Good	Excellent	N/A
Theological Formation	Poor	Fair	Good	Excellent	N/A
Takes Responsibility	Poor	Fair	Good	Excellent	N/A
English Competency	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Personal History

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Educational Readiness Rate openness and readiness to learn, and then circle the average of your responses with the numerical value.

Physical Health	Poor	Fair	Good	Excellent	N/A
Religious Perspective	Poor	Fair	Good	Excellent	N/A
Psychological Health	Poor	Fair	Good	Excellent	N/A
Integration of Learning	Poor	Fair	Good	Excellent	N/A
Curiosity/Interest	Poor	Fair	Good	Excellent	N/A
Openness to Learn	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Educational Readiness

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Ability to Learn in My CPE Setting Circle the appropriate response below as to a fit with my leadership style, and then circle the average of your responses with the numerical value.

Open to My Supervision	Poor	Fair	Good	Excellent	N/A
Abstract Thinker	Poor	Fair	Good	Excellent	N/A
Ability to be Reflective	Poor	Fair	Good	Excellent	N/A
Flexible	Poor	Fair	Good	Excellent	N/A
Cooperative	Poor	Fair	Good	Excellent	N/A
Teachable by Me	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Ability to Learn in My CPE Setting

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Personal Vision Rate the fit of personal style and functioning to taking CPE, and then circle the average of your responses with the numerical value.

Assertiveness	Poor	Fair	Good	Excellent	N/A
Self Awareness	Poor	Fair	Good	Excellent	N/A
Goal Oriented	Poor	Fair	Good	Excellent	N/A
Expectations	Poor	Fair	Good	Excellent	N/A
Motivation	Poor	Fair	Good	Excellent	N/A
Achievement of Goals	oor	Fair	Good	Excellent	N/A

Circle the Average of responses for Personal Vision

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

People Skills Rate how the individual relates to people, and then circle the average of your responses with the numerical value.

Accurate Listener	Poor	Fair	Good	Excellent	N/A
Sense of Presence	Poor	Fair	Good	Excellent	N/A
Warmth Given	Poor	Fair	Good	Excellent	N/A
Sensitivity Shown	Poor	Fair	Good	Excellent	N/A
Maturity Expressed	Poor	Fair	Good	Excellent	N/A
Empathy Shown	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for People Skills

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Previous CPE Experience Rate the prior value of CPE units taken, and then circle the average of your responses with the numerical value.

Progress with Growth Areas	Poor	Fair	Good	Excellent	N/A
Personal Satisfaction Level	Poor	Fair	Good	Excellent	N/A
Processing Ability	Poor	Fair	Good	Excellent	N/A
View of Past Supervisor(s)	Poor	Fair	Good	Excellent	N/A
Group Participation	Poor	Fair	Good	Excellent	N/A
Completion Standing	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Previous CPE Experience

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Previous Pastoral Experience Rate the student's effectiveness and current view of ministry, based on their experience, and then circle the average of your responses with the numerical value.

Management of Crisis	Poor	Fair	Good	Excellent	N/A
Pastoral Care Given	Poor	Fair	Good	Excellent	N/A
Attitude toward Ministry	Poor	Fair	Good	Excellent	N/A
View of this Experience	Poor	Fair	Good	Excellent	N/A
Current Standing	Poor	Fair	Good	Excellent	N/A
Sense of Call	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Previous Pastoral Experience

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Personal Resources Available

Rate the student's abilities and level of support for taking CPE, and then circle the average of your responses with the numerical value.

Time Available	Poor	Fair	Good	Excellent	N/A
Accessibility	Poor	Fair	Good	Excellent	N/A
Financial Support	Poor	Fair	Good	Excellent	N/A
Personal Support	Poor	Fair	Good	Excellent	N/A
Personal Boundaries	Poor	Fair	Good	Excellent	N/A
Cooperative Setting	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Personal Resources Available

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Existing Commitments

Circle how taking CPE now would fit into current commitments, and then circle the average of your responses with the numerical value.

Living Situation	Poor	Fair	Good	Excellent	N/A
Job Compatibility	Poor	Fair	Good	Excellent	N/A
Timing of taking CPE now	Poor	Fair	Good	Excellent	N/A
Community Involvements	Poor	Fair	Good	Excellent	N/A
Denominational View	Poor	Fair	Good	Excellent	N/A

Circle the Average of responses for Existing Commitments

0. N/A 1. Poor 2. Fair 3. Good 4. Excellent

Scoring

To total the student's score, simply add the assigned numbers of the average response circled at the bottom of each main category, then circle the total on the following grid: **Total Score** _____

Score 1-10 No readiness for CPE

Score 11-20 Low readiness for CPE

Score 21-30 Average readiness for CPE

Score 31-40 Good readiness for CPE

How does the student's outcome on this assessment tool correlate with your trained intuitive sense of how you felt about the student?

poor fair average good excellent

Comment on any discrepancies:

Supervisor satisfaction with accuracy of this assessment tool: (circle)

poor fair average good excellent