

**Rio Texas Annual Conference
The United Methodist Church**

Board of Ordained Ministry

**Policies and Procedures
Handbook**

**RIO TEXAS ANNUAL CONFERENCE BOARD OF ORDAINED
MINISTRY
POLICIES AND PROCEDURES
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CHAPTER 1

MISSION AND VISION

MISSION OF THE UNITED METHODIST CHURCH:

To make disciples of Jesus Christ for the transformation of the world.

VISION OF THE RIO TEXAS ANNUAL CONFERENCE:

Uniting Peoples . . . Vitalizing Congregations . . . Developing Leaders .
. . Transforming Communities ...

Mission of the Board of Ordained Ministry (The Board) (BOM):

To call out, set apart, and form missional clergy leaders in the Rio Texas Annual Conference.

To keep the mission field as the client because the formation of leaders is to be at the forefront of all clergy matters and decisions.

WHO ARE WE?

We are the people of the San Antonio Episcopal Area. We are the unified people of the former Rio Grande and the Southwest Texas Annual Conferences. We have chosen unification to fulfill the Great Commission.

Understanding and embracing what God has called us to be defines us as a united people serving God in the mission field. We are unified to reach more people, more diverse people and younger people.

We are choosing to live into the Acts church as seen in Acts 2:41-47 (The Message).

“[They] committed themselves to the teaching of the apostles, the life together, the common meal, and the prayers. And all the believers lived in a wonderful harmony . . .” They “pooled their resources . . . They followed a daily discipline of worship in the Temple followed by meals at home, every meal a celebration, exuberant and joyful, as they praised God. People in general like what they saw. Every day their number grew as God added those who were saved.”

The Board of Ordained Ministry of the Rio Texas Annual Conference recognizes that the world is different from we have known. Our purpose is not to maintain the institution, but to save lives (Gil Rendle).

Adapted from UIT report for called Annual Conference (February 8, 2014).

WHAT IS OUR STRATEGY?

To call/seek and form missional clergy leaders for a new generation and for the Rio Texas Annual Conference of The UMC.

To renew a culture of call in the church by giving strategic leadership to annual conferences, districts, congregations, campus ministries, camps, and other appropriate ministries, especially among youth and young adults. (Par. 635.2b)

The ways in which we live into this strategy (Par. 635.2a) are found below:

1. The Board will stay connected to the Campus Ministries located within the boundaries of the Conference through Board members and the dCOM.
2. The Board will interface with conference staff tasked to age level ministries to children, youth, and young adults.
3. The Board will provide training to local churches and the SPRC's as to the calling forth of new missional clergy leaders.
4. The Board will provide training to dCOMs in light of changes and additions to the *Book of Discipline*, to the BOM Conference Handbook, and to the dCOM Handbook
5. The Board will collaborate with the Leadership Development Vision Team for seeking clergy in non-traditional settings in the mission field.
6. The Board will collaborate with the Executive Director of Clergy Development for ongoing formation of clergy for the mission field.
7. The Board will give strategic leadership to the above ways and will keep the focus on the mission field as it affects clergy life in the annual conference.

QUALITIES OF A MISSIONAL CLERGY LEADER

New leaders for a new generation in the Rio Texas Annual Conference will be more effective as missional leaders. Emphasizing missional leaders will align the work of the Board of Ordained Ministry with the needs of new faith communities and the diversity and uniqueness of the mission field in the Rio Texas Annual Conference. The Board will seek and qualify missional leaders who possess the qualities given below. They will be deemed more effective to serve in our unique mission field and therefore be given priority in becoming qualified to serve in the Conference.

We define the qualities of missional leaders as those given below.

PRIMARY QUALITIES OF MISSIONAL LEADERS:

1. **Ethnic and Cultural Proficiency** – Willingness to engage in cross ethnic or cultural lines with compassion, appreciation, and sensitivity to the unique traditions, customs, and needs of the people with our context.
2. **Heart for Evangelization** – Possess the gifting and willingness to save souls, in part by networking with existing resources in the mission field.
3. **Faith in Calling of God** – A clear sense of faith and calling from God for the proclamation of the Good News in the mission field.
4. **Equipping and Developing Mission Leaders** – Ability and commitment to find and develop indigenous leaders from the mission field.
5. **Catalytic Capacity** – a capacity to be the catalyst for new faith communities and new ministry initiatives

ADDITIONAL QUALITIES OF MISSIONAL LEADERS:

6. **Leadership Ability** – Skills in providing principled Christian leadership.
7. **Visioning Capacity** – The ability to help establish, cast, and pursue a vision.
8. **Conflict Resolution & Management Skills** – The ability to manage conflict in a healthy and effective way.
9. **Personal Life Management** – This category includes time management, health and wellness, maintaining a balance between vocation and family life, etc.
10. **Perseverance** – One's capacity to persevere in unpleasant or difficult circumstances.

These qualities for missional leaders will become the priority qualities for clergy to serve in the mission field of the Rio Texas Annual Conference. The dCOM and the BOM will interview potential candidates for licensing, commissioning, and ordination along the lines of these qualities.

CHAPTER 2

BOARD STRUCTURE FOR RIO TEXAS ANNUAL CONFERENCE

The BOM for the Rio Texas Annual Conference will be structured as three teams working with specified responsibilities. Each team will have a Convener who calls the team together and facilitates the work of the team. Each team will keep its focus on the need for Missional Clergy Leaders for the mission field (see Mission, Vision section in the Handbook.)

Clergy in the Rio Texas Annual Conference should possess the Qualities of a Mission Clergy Leader. With that in mind, Team #1 will be the priority team, as to resources, so that they can seek out qualified persons.

TEAM #1: Calling/Seeking Team

TEAM #2: Formation/Equipping Team

TEAM #3: Ongoing Formation, Nurture, and Accountability

The duties of the Registrar for Elders and Deacons shall be carried out by the Conference Staff Liaison for centralization and for electronic folders. Hard copy folders will be kept in the Conference Office for security and safety. Review and movement of folders will occur electronically.

EXECUTIVE TEAM:

- Chairperson
- Vice-chairperson
- Secretary
- District Superintendent(s)
- Team Conveners of each Team (3)
- Director of Local Pastors' School
- Laypersons
- Staff Liaison
- Chair, Order of the Elders
- Chair, Order of the Deacons
- Chair, Fellowship of Local Pastors

The Chairperson, Vice-chairperson, and Secretary will not serve on teams, neither will the DS nor the Staff Liaison. Each may serve as ex-officio members on one of the three teams.

They can have voice, but no vote on the work of the team. They shall fulfill the duties of 635.2 not specifically assigned to teams.

When necessary the Leadership Team composed of the Chair, Vice-chair, Secretary, DS, and Staff Liaison may meet to develop the order of business for an upcoming Executive Team or Full Board meeting. The Leadership Team will consult with the 3 Team Leaders as to items for the Full Board meeting. The Leadership Team will keep the eyes of the Board focusing on the mission field. The Leadership Team and the Executive Officer of the Board will oversee the financial plan for the BOM.

REGULAR BOARD MEETING:

Regular Board meetings will begin with the Executive Team meeting one hour or one and half hours before the full Board begins. The regular Board meeting will begin with the three teams meeting separately before the full Board meets. Their meetings will be for brainstorming, collecting ideas for possible use, determining items for discussion and/or action at the full Board meeting, setting priorities for the team, and setting up Technical Teams when necessary. Technical Teams are determined in consultation with the Chair and Leadership Team.

The Team Leaders will keep the team members focused on the needs of the mission field and clergypersons needed for leadership in the mission field. Each team will have approximately 9 or 10 members, unless determined otherwise by the Executive Team and/or team members.

Example of a Schedule:

9:00a – 10:00a - Executive Team meets

10:00a – Worship

10:30a – Noon - Team meetings

Noon - Lunch

12:45p – Full Board meeting with focus on mission field for direction and/or action items.

TEAM #1: Calling Forth and Seeking

Responsibilities and Functions: Each item is found in Par. 635 of the 2012 *Book of Discipline*.

Included for this team are the following sections:

- Par. 635.2 (a, b)
- Par. 635.2 (h) (1)

These responsibilities will be assigned to this team:

- Vocational Discernment Coordinator
- How psychological assessments, background/credit checks are used.
- Seminary visits along with the Executive Director of Clergy Development.

This group will connect with Campus Ministry Directors, age level workers, and dCOMs as Board reps.

To seek and call emerging missional leaders, this team will work with the district and conference offices tasked with new church starts and church vitality.

TEAM #2: Formation and Equipping

Responsibilities and Functions: See Par. 635 in the BOD.

Included for this are the following sections:

- 635.2 (c, g)
- 635.2 (j)
- 635.2 (h) (2, 3, 4)

The following responsibilities are assigned to this team:

- Coordination of RIM
- Interviews and Examinations
- Scholarships/Book Money

TEAM #3: Ongoing Formation, Nurture, and Accountability

Responsibilities and Functions: See Par. 635 in BOD.

Included for this team are the following sections.

- 635.2 (k, l)
- 635.2 (n – y)

The following responsibilities are a part of this team:

- Chairs of the Orders and Fellowship of Local Pastors
- Retirement Service Liaison
- Wellness, Continuing Formation, Care of Clergy Families
- Sexual Ethics

This team will connect with the District and Conference offices tasked with clergy development. At least one member or the Team Leader should serve on the corresponding conference board.

INTERVIEWS/EXAMINATIONS:

All Board members will serve on the interview/examination teams, with the exception of the Chairperson, DS's, and Executive Officer.

DISTRICT COMMITTEES ON ORDAINED MINISTRY:

The dCOMs will be given these responsibilities to fulfill with the guidance and direction of the Conference Board. As stated in the BOD, dCOMs are subcommittees of the Conference Board and are amenable to the Conference through the Board. (see Par. 666).

- 635.2 (d, e)
- 635.2(j) (1, 2, 3)
- 635.2 (h, l, w)

The dCOMs will keep the qualities of clergy missional leaders for the Rio Texas Annual Conference as its focus so that new candidates understand the priority of the mission field. The qualities for missional clergy leaders will frame the interviews/examinations at the district level.

ADMINISTRATIVE ASSISTANT:

The Conference Administrative Assistant will issue and receive requests for book money and scholarships. The Adm Asst will work in coordination with the Assistant to the Episcopal Office, who is the Executive Officer for the Board, and with the Board Chairperson.

EXECUTIVE OFFICER:

The Conference AEO will be the Executive Officer for the Board. The position relieves the Chair so that the vision and mission can be the focus of meetings and deliberations.

The duties are outlined below:

- Centralize candidates' files at the BOM and the dCOM level, while the paper files are kept at the district level and the Conference level.
- Provide language (Spanish) translation and assistance when needed.
- Translate BOM documents into Spanish.
- Provide a website for the BOM that will include documents for candidates and dCOM's.
- Train proctors for candidacy psychological testing.
- Secure services for those speaking only language(s) other than English.
- Oversee psychological testing, physicals, background checks.
- Keep and update all forms/candidacy info on the website.
- Take on the functions of the Registrars, Elders and Deacons.
- Serve with voice in deliberations with candidates and with other issues that are in line with the *Book of Discipline*.
- Work with Board Chair on all matters related to the BOD.
- Oversee budget.
- Tracking of participation in sexual ethics training.

KEY WORDS TO KNOW

1. Associate Member (§321 - §323)

Conference relationship available to persons who have reached forty years of age, have served as full-time local pastors at least four years, completed the five-year Course of Study, studies for license as a local pastor, completed a minimum of sixty semester hours toward the Bachelor of Arts or an equivalent degree in a college or university listed by the University Senate. They must also be recommended by the dCOM and the conference Board of Ordained Ministry, declared their willingness to accept continuing full-time appoint and satisfied the conference regarding their physical, mental and emotional health. Associate members who meet all of the provisions of §322.4 and §324.6 may apply to the Conference Board for Full Membership.

2. Candidacy Mentor

A deacon or elder in full connection or local pastor who has completed the Course of Study assigned by the dCOM to an Exploring Candidate to support and guide them through *Fulfilling God's Call: Guidelines for Candidacy* and candidacy process and until the candidate is approved for local pastor or elected to provisional membership.

3. Professional Certification (certified)

The church's recognition that an individual has met the required standards for academic training, experience, and continuing study necessary to achieve and maintain professional excellence in a particular area of ministry such as Christian education, music, youth ministry, evangelism, camp/retreat ministry, spiritual formation, older adult ministry, or church business administrator. Information and details about this process and these careers can be found at the General Board of Higher Education and Ministry website: www.gbhem.org/certification/index.html. Information about the church business administrator process can be found at www.umacba.org.

4. Candidacy Certification (certified candidate) (§310-314)

Candidacy phase when requirements for Inquiring and Exploring Candidate have been met.

5. Commissioning (commissioned minister) (§310-314)

The credentialing of provisional deacons and elders for a term of service. The act of the church that publicly acknowledges God's call and response, talents, gifts and training of the candidate. The church invokes the Holy Spirit as the candidate is commissioned to be a faithful servant leader among the people, to lead the church in service, to proclaim the Word of God and to equip others for ministry.

6. Conference Board of Ordained Ministry (BOM)

The body responsible for credentialing provisional/commissioned ministers, local pastors, and full connection deacon and elders.

7. Course of Study

The basic theological education program of the Division of Ordained Ministry, General Board of Higher Education and Ministry. It is provided for those who are licensed as local pastors who are unable to attend an approved seminary. Participants in the program should have completed candidacy for ordained ministry, the studies for license as a local pastor, and have been approved/recommended for license by the dCOM and conference Board of Ordained Ministry.

8. Deacon (§328-331)

Persons called by God, authorized by the Church, and ordained by a bishop to a lifetime ministry of Word, Service, Compassion, and Justice to both the community and the congregation.

9. Diaconal Minister

Persons called to specialized ministries of service, justice, and love within local congregations and in the wider world. Their focus of service is through a variety of ministries, such as administration, education, evangelism, music, health ministries and community development – to the local congregation and the wider community. Diaconal Ministers are lay persons. No new candidates have been accepted since 1/1/97. This category has been superseded by the ordained deacon.

10. District Committee on Ordained Ministry (dCOM)

The body that oversees, cares for, and evaluates candidates for ministry through the Inquiry, Exploring and Certified Candidate phases and is also responsible for maintaining a relationship with local pastors. The dCOM shall be amenable in all matters to the BOM.

11. Elder (§332-336)

Persons who are ordained to a lifetime ministry of Service, Word, Sacrament, and Order; authorized to preach and teach the Word of God, to administer the sacraments of baptism and Holy Communion, and to order the life of the Church for mission and ministry.

12. Exploring Candidate

The second step or phase in the candidacy process for ordained deacon, elder, or local pastor. A mentor is assigned. The candidate and mentor work through *Fulfilling God's Call: Guidelines for Candidacy* and the candidate's continued discernment of their call to ministry.

13. Full Connection

The relationship of ordained deacons and elders to the Annual Conference. They have completed the process for ordination, including educational requirements, and have been elected to full membership in the annual conference.

14. Inquiring Candidate

The first step in the candidacy process for ordained deacon, elder, or local pastor. The candidate's home church minister works with the candidate in reading and discussing *The Christian as Minister* and the *Ministry Inquiry Process*.

15. License for Pastoral Ministry (§315-320)

Credential given to a local pastor when he or she is appointed as pastor of a local church.

16. Licensing School for Pastoral Ministry

The studies are the first exposure for most candidates to the practice of ministry. Public worship, pastoral care for spiritual formation, organization of a parish for nurture and mission, and educational ministries in the church are the major areas of concern covered in the eighty-hour school. The candidate must be approved by the dCOM for licensing as a local pastor before attending Licensing School. The candidate must attend the school before being approved by the clergy session of the annual conference and being appointed as a local pastor.

17. Local Pastor

Persons who are licensed and appointed to preach, conduct divine worship, and perform the duties of a pastor in the boundaries or setting of a local church but are not ordained as elders.

18. Ordination (ordained)

The church affirms and continues the apostolic ministry through persons empowered by the Holy Spirit.

19. Provisional membership (§324-327)

Conference relationship of commissioned ministers (deacons and elders and recommended Associate Members) who are on trial in preparation for membership in full connection in the annual conference as deacons and elders. During that two-year period, they are Residents in Ministry under the care of the conference Board of Ordained Ministry and participants in the RIM program. Provisional members may vote at annual conference on all matters except constitutional amendments, election of General/Jurisdictional delegates, and matters of ordination, character, and conference relations of clergy.

20. Residents in Ministry (RIM)

The Rio Texas Annual Conference two-year program for provisional/commissioned ministers and those recommended by Associate Membership. It is an orientation for ministry required in 312.

21. Certified Lay Minister

One certified annually by a dCOM and employed by a District Superintendent to supply a local church.

A YEAR AT A GLANCE*

MONTH	EVENT	DATE	RESPONSIBILITY
January	Candidacy Summit	1 st week Mon-Tues	Vocational Disc Coord
	Interviews: Provisional	2 nd Week Sun-Tues	Interview Chair
	Letters to Candidates	Last Week	BOM Chair
	RIM I Chair Selected	Jan 2 nd	RIM Coordinator
February	Interviews: Ordination	Early Feb	Interview Chair
	Board Action Items		Exec Team
	Letters to Candidates	Mid-February	BOM Chair
June	Recommends For PM Received	June 1 st	District Ofc/Registrar
	A.C. Meeting	A.C.	BOM Chair
	Clergy Session	A.C.	BOM Chair
	E-Files Reviewed	June 30 th	Registrars/Exec Officer/BOM Registrars
July	Candidacy Apps Received	July 1 st	Sally Friedli
	Interview Packets Sent	July 1 st	Interview Chair

	Invitations To Summit Sent	July 15	Voc Discernmet Coord
August	Candidacy Smt	1 st Week	Voc Disernmt Coord
	Mtng w/dCOM Chairs	last Week	BOM Chair, V.D.C.
September/Oct	Mtng w/Cabinet, Bishop, dCOM Chairs, Regsts.		BOM Chair
October	BOM Fall Mtng		BOM Chair
December	Apps-Candidacy Summit Received	Dec 1 st	Sally Friedli

*Not calendared-Yearly, the Bishop calls the inventory with the Cabinet and BOM reps, Chair and Registrar(s).

CHAPTER 3

MEMBERSHIP AND RESPONSIBILITIES OF BOARD MEMBERS

Each annual conference at the first session following the General Conference shall elect for a term of four years a board of ordained ministry (BOM). This board shall be directly amenable to the annual conference The annual conference Financial Resources Team shall recommend adequate administrative funds for the board and its staff in light of its workload. (Par. 1, b)

Membership of the Board

The Board will consist of 39 members, along with the District Superintendent(s) and the Cabinet Liaison. The 39 members will be assigned to the three teams, with 9 persons on a team or as determined.

Responsibilities of the Board

- Assume primary responsibility for the enlistment and recruitment of candidates for ordained and licensed ministry, with regard to the inclusive nature of the church, working in consultation with the cabinet and GBHEM (Par. 635.2a).
- Renew a culture of call in the church by giving strategic leadership to the annual conference, districts, congregations, campus ministries, camps, and other appropriate ministries, especially among youth and young adults (Par. 635.2b).
- Other responsibilities can be found in the remainder of Par. 635.

***Professional Ethics:**

Candidates seeking to become certified for licensed or ordained ministry shall review Par. 310, to include the complete section, with special attention to Par. 310.2(d) on how . . . *to make a complete dedication of themselves to the highest ideals of the Christian life as set forth in Pars. 103-105, 160-166.*

The standards for professional ethics in The UMC are distributed through the *Discipline* and the *Book of Resolutions* (see also Pars. 304, 324, 330, 333, and 35).

Clergy are expected to abide by the highest examples of moral and social responsibility. To that end, “all clergy to be appointed shall assume a lifestyle consistent with Christian teaching as set forth in the Social Principles” (Par. 337.2).

As a profession, clergy can see the above the requirements concerning professional ethics in all parts of clergy life. Ministry is a sacred trust and those serving in set-apart ministry must be able to exercise the basic obligations of this trust without harming others.

As in Wesleyan terms, “do no harm, do all the good you can, and stay in love with God” (see Reuben Job’s Three Simple Rules).

Clergy have a fiduciary duty to act in the best interests of those whom they serve. When a potential conflict of interests exists among the clergyperson’s interests, another member of the church, or any other entity to which the clergyperson owes professional loyalty, it is the responsibility of the professional (i.e. the clergyperson) to address this conflict in a way that protects and alerts all parties involved.

Power

Clergy are given the authority to represent the church and power in relation to laity due to their role, education, and training. Power is the ability to influence another person’s thoughts and actions. For many, clergy represent God—through both grace and judgment. Thus clergy have the power differential and are to exercise great care in the use of power in the local church and beyond. The one with the most power is careful about using that God-given gift.

The ability to and authority to make decisions affecting others’ lives may be a temptation to abuse that power. The ability to recognize, own, and use power wisely is essential to fulfilling the clergy’s professional obligation. Clergy must be willing to put others’ needs before their own, maintain appropriate interpersonal boundaries between themselves and church members, and responsibly use the power and authority of the ministerial office.

Requirements set forth in the Discipline “regarding license, ordination, or conference membership . . . are minimum requirements only (Par. 304.5). No matter how gifted, charismatic, effective or in other ways “virtuous” a candidate may be, if that person cannot be trusted not to harm congregants, he/she should not be placed in a position of ministerial leadership. Likewise, failure to uphold this basic moral duty is cause for removal from ministry.

Sexual Ethics Education

Every clergyperson, active and retired, shall receive sexual ethics education at the beginning of each quadrennium. The Executive Officer of the BOM schedules the training and clergypersons are notified as to when and how this education is to occur. Clergypersons who for disability or other reasons may be excused based on a case-by-case request.

Misconduct of a Sexual Nature

Sexual misconduct of a sexual nature is a type of violation of sacred trust that offers few second chances. A candidate’s ability to understand and maintain healthy boundaries as a sexual person is vital to the duty of do no harm. Misconduct of a sexual nature is never simply an “affair”; rather, it is a violation of the power and authority of the professional role. See the *Book of Resolutions*, p. 136 for a complete definition.

This definition in the BOD, Par. 136 covers anyone in church leadership and is especially critical for clergy to understand, especially when it comes to dating persons in the parish.

Every church in the Rio Texas Annual Conference is expected to have a safety policy for children and adults. See *Safe Sanctuary* for guidelines and training. Clergypersons are expected to guarantee that the church to which they are appointed has a safety policy.

Behavioral Health Guidelines

Each BOM member is expected to download these guidelines from the GBHEM website (www.gbhem.org/bom) and to be familiar so that should situations occur during mentorships, RIM, or interviews, they can refer to the appropriate questions. The Guidelines give questions that can be answered safely.
GBHEM/BOM/Handbook/Behavioral Guidelines.

Each dCOM member is expected to download these guidelines from the GBHEM website and be familiar with the areas included with questions available.

Each Cabinet member is expected to download these guidelines from the GBHEM and have them available when meeting and/or interviewing candidates for ministry. The guidelines are useful when meeting persons who may have the qualities desirable for the Rio Texas Annual Conference.

Social Media

The conference media office has provided a covenant for use of social media. To it the BOM adds that all clergy and all those serving in any appointed capacity are expected to represent themselves and The UMC in a way consistent with the highest ethos of our calling. Because social media has become a primary marketplace for intersecting the mission field, it is expected that clergy and those serving in any appointed capacity will speak, lead, and teach on social media in ways consistent with United Methodist Theology, Doctrine, and the Book of Discipline.

Ethics of Itinerancy

Pastors shall not return to former parishes for ministerial work except at the invitation and initiation of the current pastor. Pastors shall not give counsel or care to parishioners of former parishes.

Ethics of Shared Ministry

All clergy and all those serving in any appointed capacity are bound by rule and ethos to uphold, support, and teach standards for Christian life and the church found in the Book of Discipline. It is to be normative for all United Methodist Churches. Those who knowingly, willfully violate the Book of Discipline undermine the shared ministry of The UMC. Those who find themselves unable or unwilling to uphold their vows of Order are encouraged to resign their status rather than compromise their ethics.



3 Simple Rules for Social Media

The Conference Communications Commission supports the use of social media and believe it can be a valuable tool for ministry. We affirm these guidelines to help utilize social media in a manner that positively represents the church, the Gospel and Jesus Christ. 6/1/14

DO NO HARM

One of the benefits of social media is that it provides the opportunity to share views, thoughts, joys and concerns about all areas of life. Our social media contributions can be very effective tools for ministry if we are careful to apply caution before we post. We will be careful that our posts are not “doing harm” by insulting or damaging the reputation of others. We will make sure our posts are respectful and in good taste. And we remember: Everything we post – status updates, comments, tweets, blogs - becomes public immediately after we click “send”(even if we’re using a limited access setting). We can’t take it back once it’s out there, so we will use discernment with everything we post.

TO THINK ABOUT:

Is the post “doing harm” to the reputation of the church, Christ or another person or organization?
Can the post be interpreted as harmful, offensive, rude or distasteful?
If using the post as an outlet to vent, is there a more productive, less public way to do so?

DO GOOD

Social media is one of the most effective methods of church networking and communicating today. When used properly, it can have a significant encouraging influence on our readers and become a powerful tool for delivering the Gospel message to a large audience that extends beyond our contact list. It is a great tool for networking and providing the world with news about our church and ministry. It also is a very useful tool for obtaining feedback and ideas from our audience and can be used to gain insight for sermons, Bible study topics, worship times, needs of the community, etc. The “good” and positive uses of social media are endless.

TO THINK ABOUT:

Can the post be described as “good”?
Will it help the Kingdom and fellow believers?
How will it be perceived by non-believers?
How will the post be received by people with different cultural or faith backgrounds?
Are we communicating effectively by asking questions in addition to providing information?

STAY IN LOVE WITH GOD

Social media is a great way to find meaningful devotional materials, thought provoking blogs, inspiring worship videos and media resources, and current articles and tools for our ministry. Users have reported that their social media usage helps keep them informed and enthusiastic about their ministry on a daily basis. While it can definitely help us “stay in love with God,” it also can be very distracting. We will make sure our use of social media does not occupy so much of our time that we are no longer participating in meaningful Bible study, devotional times, worship and conversations with our fellow brothers and sisters in Christ. Social media can serve as a tool to aid, promote and conduct discussions, studies and devotional times, but should not be our primary source of interaction with the world.

TO THINK ABOUT:

How is/can social media helping me to stay in love with God?
How is it hindering me?
How am I helping others stay in love with God by my social media contributions?

REMEMBER: *Our character and faith are reflected in each post we make, so if we are not sure about something, we won’t post it.*

RESPONSIBILITIES OF BOARD MEMBERS

Attendance

The work of the Board of Ordained Ministry for the Conference is extensive and requires the participation of all members. All members will serve on a team so that each team member bears the load of the work involved. If a Board member cannot attend a meeting, they should notify the Board chairperson as far in advance as possible. If repeated absences occur, or if notification is not given, then the chairperson of the Board may ask the Board member to resign. If the Board member finds that they cannot participate fully then the Board member is asked to resign voluntarily.

Notification of resignation from the Board is through letter to the Bishop and chairperson giving reasons for resignation.

Attire

During interviews of candidates for provisional and ordination/associate membership, Board members should dress in business. No shorts or jeans should be worn at the interviews of candidates. The candidates dress in business attire because these are important to them and we should respect this important time in their lives.

Teams and Technical Teams

In order for the Board to fulfill all of its responsibilities and its function within the Conference, every Board member is expected to serve on a Team, on a Technical Team when asked, and on interview/examination teams. It is expected that Board members will serve on teams and special technical teams when asked by the chairperson.

Interviews/Examinations

The Board is divided into three interviewing teams: Call/Disciplined Life/Service, Worship and Proclamation, and Theology and Doctrine. The Interview/Examination chair, in consultation with the Board Chair, selects interview team conveners.

Assignment to teams is made by the Interview/Examination chair, in consultation with the Board chair, and on a volunteer basis. Attention is paid to the composition of each team while also trying to keep a balance of elders and deacons, clergy and lay, male and female, racial/ethnic persons.

Readers are expected to complete the review of all application materials and the sermon video prior to their arrival at the Board meeting.

Recusal

When a Board member has a member of their family appearing before the Board, the Board member shall recuse themselves from the interview and deliberation process. Likewise, when a current staff member or a current church member of the Board member appears before the Board, the Board member shall recuse themselves from the interview and

deliberation process. It is requested that the Board member inform the chair of the Board ahead of time about the conflict.

Confidentiality

The Board members discuss the candidates as a whole; therefore, all matters concerning candidates and other issues are kept in the strictest confidence. Board members are not to discuss decisions and actions of the Board outside the membership of the Board unless specific release is given by the chairperson of the Board.

Board members are not to attempt to interpret to candidates the actions that had been taken regarding any application process/procedure. Such interpretation is done solely by the chair of the Board. The breaching of confidential information and actions is grounds for dismissal from the membership of the Board.

Confidentiality on the Board is considered a sacred trust.

CHAPTER 4

SYSTEM OF CLERGY FORMATION

In fostering a culture of call, the Board will maintain a system wherein potential candidates/clergy and current clergy experience a systematic approach to formation.

The system focuses on three major areas:

1. **Calling and seeking candidates:** in current places, the mission field, colleges, public schools, and places in which the church has not yet been a presence.
 - The closest parallel is to the corporate world that sends out recruiters to find the best of the best.
 - The qualities of missional clergy leaders will be the measure of persons recruited.
 - The dCOM is the closest to the mission field and will therefore seek candidates, rather than just receiving those who come.

2. **Forming clergy for the mission field:** in the Residency in Ministry where those determined to be ready are prepared for the mission field
 - Formation happens with Local Pastors who are seen and interviewed by the dCOMs and continue with growth agendas.
 - Formation may have already happened with one who brings ordination from another denomination.
 - Formation happens within the lay ministry area, such as the Certified Lay Minister avenue.

3. **Ongoing Formation, Support and Accountability:** It is here that current clergy can return for continuing formation as a missional leader. The Office of Clergy Development will be preparing those types of formational event.

CHAPTER 5

DISTRICT COMMITTEE ON ORDAINED MINISTRY

The district committee on ordained ministry shall be amenable to the annual conference through the board of ordained ministry. (§666.1)

The BOM shall select from its own membership an official representative to serve as a member of each district committee on ordained ministry, which shall function as a subcommittee of the board. (§635.1g)

The committee shall supervise all matters dealing with candidacy for the ordained ministry and with the license for local pastor. (§666.5)

- Structure of the dCOM: Roles and Responsibilities
- Overview of Candidate Formation
 - Candidacy Summit
- Interview and Examination
 - Etiquette and Ethics of Asking Questions of Candidates
 - Initial Certification
 - Recertification
 - Local Pastor: 3 categories
 - Report of Mentor and Self-report of Candidate
- Responsibility to BOM
- Forms and Resources

Structure of the District on Ordained Ministry (dCOM) (¶666)

I. Membership

- A. Election (*The 2012 Book of Discipline of the United Methodist Church*, ¶ 666.1)

Nominated annually by the district superintendent in consultation with the chairperson or executive committee of the conference Board of Ordained Ministry (BOM). Approved by the annual conference/district conference.

- B. Composition of the dCOM (*2012 Book of Discipline*, ¶ 666.1)

1. A representative from the conference Board of Ordained Ministry named by the board after consultation with the district superintendent, who may be named chairperson.
2. The district superintendent.
3. At least six other clergy in the district. The Clergy shall include elders and deacons, and where possible, women and racial/ethnic clergy.
4. Encouraged to include a deacon or elder who is age 35 or younger, an associate member, and one local pastor who has completed the Course of Study. Attention should be given to maintaining diversity and inclusiveness.
5. At least three members of local churches.

- C. Number of members

The dCOM may have a membership of eleven to twenty members.

- D. Vacancies

Interim vacancies may be filled by the district superintendent.

II. Officers of the dCOM and Their Duties

Each dCOM shall include the following officers and duties. Officers are elected at the first meeting following the annual conference session. (*2012 Book of Discipline*, ¶ 666.2)

- A. Chairperson (working with DS and District Registrar)

1. To ensure the members of the committee are properly trained.
2. To call regular meetings of the dCOM and see that notices are sent informing each member of the time, place, and agenda.
3. To be in touch with candidates/mentors regarding meetings.
4. To work with district registrar in planning the agenda for each meeting.
5. To preside over meetings or appoint a temporary chair.
6. To make sure the committee understands the scope of its duties and fulfills them with care.

7. To maintain a close liaison with the conference Board of Ordained Ministry, the BOM registrar, and other officers or committee chairpersons who must regularly share information from the dCOM. In the Rio Texas Annual Conference that will be the Uniting Table and the Leadership Vision Team.
8. To work with other chairpersons of district committees in the conference to ensure consistent use of procedures.
9. Send follow-up letters to all candidates following any interview. The letter should contain an affirmation of their strengths and all specific information about growth agenda items assigned to the candidate at the interview including area/issues of concern, deadline for completing the growth agenda, name of mentor, how to get in touch with that person, kind of report expected, and a reminder about approximate time to appear again before the committee. A copy is also sent to the candidacy mentor, dCOM registrar, and district superintendent.

B. Vice Chairperson

1. To preside at meetings when the chairperson is unavailable.
2. Any other duties as assigned by the chairperson.

C. Recording Secretary

1. To take the minutes of the meeting. They should contain the name of candidates interviewed, action/voting taken (especially when a recommendation for PM, a $\frac{3}{4}$ written ballot with the numerical vote recorded), any growth agendas assigned, and progress on growth agenda.
2. To distribute copies of the minutes to committee members and to the BOM registrar and/or executive officer of the BOM.
3. To conduct correspondence and business necessary for the efficient functioning of the committee as directed by the chairperson.

D. Registrar

1. Maintain files on all candidates for licensed local pastors and certified candidates.
2. Maintain *Personal Data Inventory* for all candidates. The updated *Personal Data Inventory* for all candidates and local pastors to be interviewed at a meeting is sent to every member of the dCOM. This form also serves as the reporting form sent to the office of the BOM registrar following any interview the candidate has with the committee.
3. Receive copies of the candidate's materials, at the certification, renewal of certification, local pastor, and continuance of local pastor, associate

membership, and provisional level, to be distributed to appropriate members of the dCOM.

4. Send to dCOM members the following information prior to meetings:
 - Certification: all committee members receive copies of the following:
 - a) Personal Data Inventory
 - b) The Candidacy Mentor's report – No recommendations, only anecdotal narrative.
 - c) Psychological Evaluations are not sent to the dCOM members. Psychological Evaluations are sent to the District Superintendent, DCOM Chair, BOM Registrar and BOM Chair.
 - d) Only dCOM chairperson, dCOM registrar and Board representative receive copies of the complete Health Assessments, Credit Check and Background Check results.
 - Renewal of Candidacy:
 - a) all committee members receive a copy of the following: Growth Agenda progress from Mentor and candidate.
 - b) Every committee member receives the current *Personal Data Inventory*
 - Local Pastor Continuance: all committee members receive a copy of:
 - a) *Local Pastor Annual Continuance Form*
 - b) *Updated Personal Data Inventory*
5. May attend meetings of the District Committee on Ordained Ministry.
6. Information to be included in the growth agenda includes the Mentor Report and the Self-Report.
7. When a candidate's application for associate membership or provisional membership is recommended by the dCOM to the conference Board of Ordained Ministry, the registrar will send the candidate's complete file to the BOM registrar/Executive Officer. The dCOM registrar will keep a complete copy of all files sent to the BOM registrar/executive officer.
8. Before file is sent, the candidate's file is inventoried so that the file is complete.
 - a) Initials that file is complete.
9. The registrar receives from the local pastor annual reports on his/her progress in the Course of Study until completed. Transcripts from Course of Study will come to the BOM registrar/executive officer the following year by the end of February who then sends it to the dCOM registrar. When the Course of Study is completed, the BOM registrar/executive officer may receive reports on Advanced Course of Study classes completed or any other educational studies. They will be sent to the dCOM registrar. Other reports to be received include the Pastor's Report to the Charge Conference, Recommendation of the District Superintendent, and the *Local Pastor Annual Continuance Form*.

10. Sends annually the *Local Pastor Annual Continuance Form* to each local pastor.
11. Maintain list of licensed local pastors.
12. A local pastor who becomes an associate member of the annual conference no longer has a relationship with the dCOM.
13. All files will be maintained in the district office.

III. Transfers from other denominations

1. Persons from other denominations seeking appointment to a United Methodist Church or ministry are to request a meeting with the District Superintendent. Then a file is developed, including a Psychological Assessment.
2. File is sent to the BOM registrar and the BOM conducts interviews, as needed.
See Chapter 8 on Other Denominations appointment and transfers and guidelines.

IV. Executive Committee

A. Membership.

The dCOM executive committee is composed of the dCOM chairperson, vice chairperson, district superintendent, registrar, secretary, a lay person, and other individuals as designated by the chairperson to maintain diversity.

B. Responsibilities.

1. To assist the dCOM in making decisions between regular meetings of the dCOM.
2. To serve as an interim dCOM to review the work of candidates applying for local pastor, associate membership, or provisional membership who are assigned growth agendas that must be completed before recommendation for Provisional or Associate membership before the May 1 deadline so that they can send their completed and recommended application to the BOM registrar/executive officer by June 1.

V. District Committee on Ordained Ministry Meetings/Deadlines

A. By May 20

Candidates for Certification

Candidates applying to the conference Board of Ordained Ministry for:

Associate Membership

Provisional Membership on Deacon/Elder track

B. By June 1 – Send files of persons recommended for Provisional and Associate Membership to the BOM registrar/executive officer

- C. Meet all candidates seeking certification, certified candidates, seeking renewal of their candidacy status, including candidates newly certified in spring of the current year, January – March.

1. Meet/interview all local pastors for renewal of local pastor status. They should have returned the completed *Local Pastor Annual Continuance Form* to the district registrar prior to the meeting. Local pastors who are still attending Course of Study will have an interview with the dCOM.
 2. Local pastors who have completed Course of Study may be met as a group. A local pastor may request a personal interview with the dCOM. The district superintendent and chairperson may require an interview with a local pastor if they deem it necessary.
- D. A Retreat for Local Pastors and their Mentors is suggested in late summer after the Course of Study School for the purpose of outlining expectations of the Local Pastor/Mentor relationship and continuing education on pastoral skills/issues.

Responsibilities to the BOM

1. dCOMs affirm the theological readiness for provisional interviews and RIM based on their examination of candidates and the candidates' ability to articulate Methodist theology.
2. dCOMs affirm through process notes/minutes that any plan that the candidate developed has worked, the candidate has a commitment to the plan, and the candidate has demonstrated progress on the plan, i.e. growth agenda.
3. dCOMs assure the BOM that there has been a thorough examination of the candidates and they meet the qualifications and highest ideals of the Christian life as set forth in ¶103-105; 160-166 before sending candidates to the BOM.
4. Require candidates to submit ¶324.13 to the BOM Registrar to be kept in the candidate's file, which includes ¶310.2(a)(i-vi).

NOTE: All candidacy interviews and mentor conversations are to be kept confidential. All assessments are to be kept confidential, as well.

Rio Texas Annual Conference System for Candidate Formation: Deacon, Elder, and Local Pastor

Overview of Candidate Formation and Candidacy Summit

Purpose: To provide a framework of formation, discernment, and public acknowledgment for those persons exploring and discerning a call to licensed or ordained ministry; and to provide a means by which the church may respond faithfully and consistently to the identifying and forming of spiritual leaders for the mission field.

Description: *Candidacy for licensed and ordained ministry is the first formal step toward annual conference membership and ordination as a deacon or an elder, or for licensing for pastoral ministry in The UMC. Candidacy begins when the potential candidate inquires about ministry and continues until that person is commissioned as a provisional member or is approved, appointed, and licensed as a local pastor. Candidacy also ends if a person withdraws from candidacy or is denied by the dCOM or BOM. (GBHEM BOM Handbook, 2012)*

From beginning of candidacy throughout licensure as a local pastor until ordination, mentoring plays a pivotal role.

Mentoring occurs within a relationship where the mentor takes responsibility for creating a safe place for reflection and growth. . . . Mentoring is a part of the preparation and growth for inquirers and candidates for ordained ministry. . . . Mentoring is distinct from the evaluative and supervisory process that is a part of preparation for ministry. ¶349

There are two categories of mentor: candidacy mentor and clergy mentor. Each has distinct functions and responsibilities.

- *Candidacy Mentor*
 - Candidacy mentors are clergy in full connection, associate members, or fulltime local pastors who have completed the Course of Study, trained to provide counsel and guidance related to the candidacy process.
 - Candidates will be assigned to a candidacy mentoring group wherever possible, or to a candidacy mentor by the district committee on ordained ministry in consultation with the vocational discernment coordinator and the district superintendent. ¶ 349.1a
 - Candidacy mentors work with the candidate until that candidate begins serving in an appointive ministry as a local pastor or a commissioned minister.
 - *Effective candidacy mentors have a mature faith, model effective ministry, and possess the skills needed to help individuals discern their call in ministry (¶349.2)*

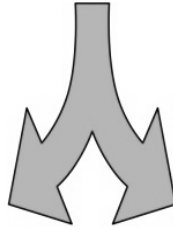
- *The Vocational Discernment Coordinator coordinates the candidacy mentoring process (§ 635.1c). Responsibilities include working with the BOM, dCOMs, and DS to coordinate, implement, and strengthen the candidacy process throughout the annual conference. This includes recruiting, training, and assigning mentors to new candidates. (GBHEM BOM Handbook, 2012)*
- *Clergy Mentor*
 - ¶349.1b Clergy mentors are clergy in full connection, associate members, or full-time local pastors who have completed the Course of Study, trained to provide ongoing oversight and counsel with local pastors and provisional members pursuing ordained ministry.
 - Local pastors will be assigned a clergy mentor by the district committee on ordained ministry in consultation with the district superintendent.
 - Provisional members will be assigned a clergy mentor in full connection by the conference board of ordained ministry in consultation with the district superintendent.

At the heart of Candidate Formation is the Candidacy Summit and Group Mentoring.

The Candidacy Summit is a 32 hour retreat which all candidates for licensed and ordained ministry must attend. The Summit is offered twice a year, in January and again in August. During this Summit candidates receive accurate information about the Candidate Formation Process; begin meeting together with their Mentor Groups led by their trained Candidacy Mentors; worship together; participate in an Orientation to Ministry (§ 312), where they learn about the varieties of set apart ministry (deacon, elder, licensed local pastor); meet District Superintendents and others; set up future meeting dates with their Mentor Groups; and complete testing for Psychological Assessment.

Group Mentoring provides a setting to help the Candidate to explore and clarify their call to ministry. It is within community and the mutual sharing of experiences that often we gain clarity and insight about ourselves. Without the need to have a mentor for each and every candidate, the conference can select quality mentors who really feel called to be a mentor.

Candidate Group Mentoring together with the Candidacy Summit provides a consistent, hospitable, clear and efficient framework for candidate identification and formation.



Local Pastor

1. Certified Candidate
2. Application approved by DCOM, then affirmed by BOM
3. Approved at Clergy Session and Licensed as Local Pastor
4. Attend Course of Study

Provisional Elder or Deacon

1. Certified Candidate for minimum of 1 year, maximum of 12 years
2. Completion of education requirements. Application approved by DCOM, then BOM
3. Approved at Clergy Session and Commissioned as Provisional Elder or Deacon.
4. Approved to be elected Associate Member after completing two years in RIM.

Full Connection Elder or Deacon

1. Provisional for minimum of 2 years; maximum of 8 years
2. Attendance and participation in RIM – assessments by RIM team.
3. Application approved by BOM
4. Approved at Clergy Session of Annual Conference and Ordained as Full Connection Elder or Deacon
5. Approved for election as Associate Member at Clergy Session of Annual Conference.

Interview and Examination Etiquette and Ethics of Asking Questions of Candidates

Belief: As dCOM and BOM members, we are privileged to sit with our peers and with those newly called to ministry, all of us are on a 'journey to perfection.' At the same time, we have been entrusted with the responsibility to make decisions that are in the best interest of the Church.

Prayer: We ask that where God may be at work in each person's life we might with great sensitivity, join in. We ask prayerfully that our questions and comments might encourage the candidate to own their part of the journey and that our offering of contingencies might reflect the need we best can articulate for each to move forward in this process.

The following reflective questions and comments are meant to remind us of our responsibility in this process:

1. **HOSPITALITY.** In whatever way we can – our greetings, our prayers, our attempt to invite comfort and the reduction of stress, should be foremost in our minds and in our actions. Our first questions should, therefore, be easy to answer.
2. **THE SURROUNDINGS.** The room should be comfortably arranged so that we might be as professional as possible. Computer screens, books, etc. should be closed. Cell phones should be turned off. The goal is to give the person our undivided attention. Active listening is a profound act of love.
3. **AFFIRMATION.** As we spend our designation time with the candidate, we should affirm growth where we see it and do it in "I" language. "I am proud of the way you took that assignment that you probably did not want to do and learned some things about yourself in the process. Thank you for sharing how you felt about doing it and how you have grown in the process."
4. **ASKING QUESTIONS.** Questions should be asked that elicit more than a 'yes' or 'no' answer. Keep the questions open-ended. If the answer does not reflect an area in which the candidate has been asked to grow, we might follow up with one or two more questions.
5. **KNOWLEDGE and SELF AWARENESS.** Enough questions should be asked to tell us whether the person knows the information and only enough questions that tell us whether they are self aware of their issues. We must NOT go on and on when we have enough data that tells us whether they 'got it' or not. On the other hand, we must NOT just ask 'fluff' questions that avoid the pertinent issues.

6. **THE KINDS OF QUESTIONS – TOO NICE/TOO TOUGH.** This interview is not about being too nice or too tough. It is about asking appropriate questions with kindness and respect so that we can know how far along the person is on their journey. We are there to ask what we do not know about their journey, to note what might be missing, (so that we can frame helpful growth agenda or contingencies) and to affirm God’s work through them.
7. **CORRECTIONS.** If the person does not answer the way we think they ‘should,’ our job is NOT to correct them or rescue them. Again, our job is to respond with helpful growth agendas.
8. **THAT DAZED LOOK.** If the person looks ‘dazed’ when we ask a question, we can ask if they would like it phrased another way.
9. **THE CANDIDATE’S QUESTIONS.** The candidate, if appropriate, needs to have time to ask us questions, but ONLY questions that have to do with the process, not questions about how well they are doing, if they made a mistake, how we voted, etc. Those questions put us in an ‘evaluative position’ that is NOT appropriate.
10. **NOT ABOUT US!** The interview is about the candidate; it is NOT ABOUT US and our thoughts, our feelings, our beliefs. We must put our passion about an issue or about a person aside. If we cannot do that in regard to someone, we should sit silent and prayerful during the interview or should ask to be excused before the interview.
11. **TO EVALUATE THE PROCESS.** Both the dCOM and the BOM needs to, on occasion, evaluate their own process. We might do that prayerfully about ourselves and/or we might invite an independent source to observe us and respond with comments. Such questions as the following might be used:
 - a) Are our questions and concerns prayerfully asked?
 - b) Are we asking the kinds of questions that will help shape the candidate’s ownership of the process?
 - c) Are we asking questions that will help us shape our decisions on the candidate’s behalf?
 - d) Are we doing most of the talking or is the candidate? Are we allowing one member to do all the talking and/or others to say nothing?
 - e) While the candidate is being interviewed, are we debating among ourselves, inserting humor inappropriately, interrupting, and/or sidetracking the purpose for being there, etc.?
 - f) Are we honoring confidentiality?
12. **FEEDBACK FROM THE CANDIDATES.** Perhaps, after a period of time in ministry, we could ask for the candidates to reflect on our process as a way to community that we are open to

reflective assessment also and open to our own personal growth. Such questions as the following might be asked:

- a) How did you experience your time with the committee/Board?
- b) How might we make the interview process even more focused on the candidate's journey in ministry as opposed to "the committee/Board is here to judge you, so prove yourself?"
- c) What did you experience as judgment as opposed to what did you experience as grace....realizing that a 'no' or 'not at this time' is often an act of grace but may not be realized at the time?

13. ALL MATTERS CONTAINED IN THE BOOK OF DISCIPLINE ARE GERMAIN

14. CULTURAL SENSITIVITY dCOM and BOM members shall maintain openness and sensitivity to people of other cultural backgrounds.

What an awesome responsibility we have! Let us pray that we do not take it lightly. Jesus called people, confronted them and complimented them as they grew (or chose not to grow) in His invitation to discipleship. So must we live by His call in our own lives and model that process as participants in the dCOM and on the BOM.

Interview for Certified Candidacy

I. Purpose of the Candidacy Interview

- A. Fitness and potential effectiveness are basic to the purpose of the candidacy interview. Interest inventories, psychological assessments, and lifestyle issues are dealt with here. Exploration of the candidate's call to ministry happens in this interview. The substance of this interview provides background for reference to a person's call in later interviews. Only when **unresolved or new fitness issues** emerge, or the candidate later questions his or her calling, would it be necessary to include **fitness** as a focus at the provisional or full connection membership interviews.
- B. Ask about the way in which the candidate relates to God and understands the call to ordained ministry. Listen for how the candidate expresses his/her understanding of him/herself and of God's call and to describe their plans for continuing in the educational preparation for licensed or ordained ministry.
- C. Candidates for certification should not be evaluated either in terms of the development of skills for ministry or of demonstrated effectiveness. Fitness and the potential for effectiveness are the criteria which are to be used in the certification interview.
- D. Attention is paid to the qualities of a clergy missional leader for the Rio Texas Annual Conference. (Chapter 1, p. 8)
- E. Fitness includes meeting all qualifications for ordination as outlined in p 304 of the Book of Discipline. Questions should be asked to ensure all basic qualifications have been met.

II. Requirements:

- A. Recommendation by home church conference and Staff Parish Relations Committee or United Methodist Campus Ministry equivalent.
- B. High School graduate or equivalent.
- C. Member of the United Methodist Church or United Methodist Campus Ministry for one year, with leadership given at least one year.
- D. Completed *The Christian as Minister* with their pastor or Director of Campus Ministry.
- E. Attended Candidacy Summit, and participated in group mentoring process. dCOM receives a report from the Group Mentor.
- F. Written response to statements found in ¶310.2a (i – vi) and Personal Data Inventory.
- G. Completed psychological assessment and evaluation.
- H. Medical Report
- I. Credit Report, Criminal Background Check, Candidate Disclosure Form #114, and Psychological Assessment (see next page for description and use.)
- J. Interview with the dCOM.

III. Assessments Required Before Certification Interview

There are several assessments required of candidates before the interview for certification. They are the criminal background check, credit check, and health and psychological assessments. All forms for assessment are included in the Candidacy Summit packet. See Candidate Checklist and Candidacy Summit Application at the end of the chapter.

Psychological Assessment: Once the psychological assessment is completed, it is sent to the District Superintendent. The only other people allowed to see the psychological evaluation are the dCOM Chair, BOM Registrar and the BOM Chair. Copies are not to be made and distributed to the dCOM members. Based upon the report, the report is returned to the candidate's file for future reference by the BOM, if needed.

There are three types of summary statements by the psychological assessment professional:

- a. The first is the green light statement, which means that the candidate is cleared for certification.
- b. The second is the yellow statement, which means that the candidate will do no harm and can be cleared for certification.
- c. The third statement is a red light statement. Under no conditions is the candidate to be certified as a candidate for licensed or ordained ministry (approved by BOM on February 9, 2014) at this time.

The candidate is to be made aware of these three possibilities before they take the psychological. The candidate may choose to work on the issues presented in the summary statement of the report at their own expense. They may choose to seek counseling. If they choose to be tested again at the end of counseling, they shall pay for the psychological assessment at their own expense.

Other Forms and Assessments:

1. Background check: If there is a red flag, the DS or executive officer works with the candidate to determine the nature and the response to that red flag. Notes are to be included in the candidate's file if the issue is cleared or if the issue remains, which may indicate it is a red light statement. Further details from the candidate will be required in such a case.
2. Medical check: If there are physical issues, then the dCOM and/or Mentor assists the candidate with the development of a plan for the medical issue. This is part of their growth agenda.
3. Credit check: If the candidate has an unfavorable credit report, the candidate and the DS must discuss and the DS can determine if the debt is a hindrance to ministry or not. If not, the DS and candidate will sign off on a plan to repair the debt. The DS will place a letter in the candidate's file stating they have discussed the debt and there is a plan in place to repair his/her credit issues. Sufficient debt does not have to include seminary debt or undergraduate debt; it concerns personal debt/credit card debt.

4. Candidate Disclosure Form #114: Notarized statement detailing any convictions for felony or misdemeanor or written accusations of sexual misconduct or child abuse.
5. If any behavioral issues are revealed, then the dCOM is to use the *Behavioral Health Guidelines* found at the end of this handbook. Each dCOM is to have the guidelines on hand and be familiar with the issues and questions to be asked.
6. A plan to remediate any of the above issues becomes part of the candidate's growth agenda so that each year the candidate reports progress. Progress notes are included in the candidate's file for use by the BOM if that becomes necessary.
7. Questions about the plan can go like this:
 - a. Do you have a plan?
 - b. Is the plan working for you?
 - c. Are you working the plan?

IV. Material to be reviewed are as follows: Every committee member should have received copies of the questions (§§310.2a(i)-(vi), mentor's report, and Personal Data Inventory. Only dCOM chair, DS and BOM rep review other material, such as psychological and health assessment, credit check, background check and candidate disclosure form. If issues are found in the other material, the dCOM chair, Registrar, DS or BOM rep will raise them during the interview. Written responses to the questions provide evidence of understanding and expectation concerning the following found in *Fulfilling God's Call: Guidelines for Candidacy*, as given below:

- a. A written statement of call as outlined in the *The Book of Discipline* §310.2a
 - a) The most formative experience of your Christian life; b) God's call to licensed or ordained ministry and the role of the church in your call; c) your beliefs as a Christian; d) your gifts for ministry; e) your present understanding of your call to ministry as elder, deacon, or licensed ministry; f) and your support system.
- b. Provide written agreement to highest ideals of the Christian life *The Book of Discipline* §304 and §310.2d

V. And agree for the sake of the mission of Jesus Christ in the world and the most effective witness of the gospel, and in consideration of their influence as ministers, to make complete dedication of themselves to the highest ideals of the Christian life as set forth in §102-10), and §160-166 of *The 2012 Book of Discipline*. To this end agree to exercise responsible self-control by personal habits conducive to bodily health, mental and emotional maturity, fidelity in marriage and celibacy in singleness, social responsibility, and growth in grace and the knowledge and love of God.

VI. In addition, the *The 2012 Book of Discipline* states, "While persons set apart by the Church for ordained ministry are subject to all the frailties of the human condition and the

pressures of society, they are required to maintain the highest standards of holy living in the world. The practice of homosexuality is incompatible with Christian teaching. Therefore, self-avowed practicing homosexuals are not to be certified as candidates, ordained as ministers, or appointed to serve in The United Methodist Church.” (§304.3)*

**Self-avowed practicing homosexual’ is understood to mean that a person openly acknowledges to a bishop, district superintendent, district committee on ordained ministry, board of ordained ministry, or clergy session of the annual conference that the person is a practicing homosexual.*

VII. Voting Decision for Certified Candidate

- A. There will be a written ballot with a $\frac{3}{4}$ majority vote needed for approval.
- B. Possible decisions:
 1. Recommend as a Certified Candidate. A Growth agenda may be assigned. Candidate must make satisfactory progress on growth agenda before making application for provisional status or local pastor.
 2. Not recommend. The District Committee on Ordained Ministry does not believe that the candidate demonstrates fitness and fruitfulness for licensed or ordained ministry at this time.
 3. Options available to the candidate:
 - a. To explore their call to be a lay member of a congregation.
 - b. To explore their call to licensed or ordained ministry with another annual conference or denomination.
 - c. Pay special attention to evidence of gifts, fruitfulness and God’s grace for the work of ministry.

The Role of the Mentor in the Interview Process

I. For the Certification Interview. If a member of the dCOM is the mentor for a candidate to be interviewed, the mentor temporarily may relinquish the role of dCOM member. In that case, the mentor may choose to leave the meeting as the committee prepares for the interview. The mentor waits with the candidate to be called into the room for the interview. The mentor sits silently with the candidate. The role is supportive, but not an advocate for the candidate.

The definition of candidacy mentor in the book of discipline (349.2). “Mentoring is distinct from the evaluative and supervisory process that is part of preparation for ministry.”

The report of the mentor must be signed by the candidate as well. The mentor is to be trained by the Board member who trains all candidacy and group mentors. The *Guidelines for Candidacy Guidebook* states on page 131: “Your candidacy mentor is encouraged to be present with you in the meeting with the dCOM to present the report and to observe interaction between you and the committee. The candidacy mentor is expected to be an observer (after the initial report) so that the members of the committee can talk directly with you and you with them. Your candidacy mentor is not present to try to influence the vote of the committee about you. Your presentation of yourself and the

documentation you submit are the primary criteria on which the dCOM will decide whether or not to certify you as a candidate for licensed or ordained ministry.”

II. For all other interviews (renewal of certification, local pastor, renewal of local pastor, associate membership, and provisional membership) family members of the candidate shall excuse themselves from the room for interview, discussion, and voting. Also, if this person is the candidate’s pastor, he/she may excuse himself/herself from the room. The pastor may not offer additional information on behalf of the candidate. All information should be shared face-to-face with the candidate before the interview. The candidate receives a written letter as to the results of the dCOM action.

Interview for Renewal as a Candidate

I. Purpose of the Candidacy Renewal Interview

- A. The dCOM must renew the certified candidacy status of each candidate annually (§313) or the candidate is automatically decertified (§314.1). The candidate may be reinstated by the dCOM in which they were discontinued (§314.2)**
- B.** For 1st renewal of certification, dCOM begins questions that relate to §324.9.
- C.** Pay special attention to evidence of gifts, fruitfulness and God’s grace for the work of ministry.

II. Requirements:

- A.** Annual recommendation of the candidate’s home church charge conference.
- B.** Evidence that the candidate’s gifts, graces and fruits continue to be satisfactory at interview.
- C.** Evidence that the candidate is making satisfactory progress in the required studies.
 1. Candidate preparing for provisional membership shall present annually to the dCOM a transcript from their college or school, OR School of Divinity.
 2. In fulfillment of the educational requirements a candidate preparing for local pastor will attend and complete an approved licensing school for pastoral ministry.
 3. Candidate is making progress on their growth agenda.

III. Material to be Reviewed

- a. Report from Registrar on progress in studies.
- b. Annual report of church conference.

IV. Voting/Decisions for Renewal of Certified Candidate

- A.** There will be a written ballot. Majority vote needed for approval.
- B.** Possible decisions:
 1. Recommend: A Growth agenda may be assigned. Candidate must make satisfactory progress on growth agenda before making application for provisional status or local pastor.

- a. A report should be sent to BOM registrar/executive officer as well as copies to the candidate, district registrar, and dCOM chair. All previous growth agenda items must be completed before applying for local pastor or provisional membership.
- 2. Not to Renew Candidacy. (§313, *Book of Discipline*)
The District Committee on Ordained Ministry does not believe that the candidate's call to licensed or ordained ministry matches the call as it is understood by the Rio Texas Annual Conference of The United Methodist Church.
Options available to the candidate:
 - a. To explore their call to be a lay member of a congregation.
 - b. To explore their call to licensed or ordained ministry with another annual conference or denomination.
 - c. To respond to the previously suggested growth agenda from the dCOM and reapply for certification as candidate in a minimum of one year.

Interview for License as a Local Pastor (§315-320)

- I. The purpose of this interview is to determine the candidate's fitness and readiness for licensing for pastoral ministry. Local pastors are persons not ordained as elders who are appointed to preach and conduct divine worship and perform the duties of a pastor.
- II. Interviews by the dCOM (for full and part-time local pastor)
- III. Requirements
 - A. High school graduate or equivalent
 - B. Certification as a candidate for ministry
 - C. Completed Licensing School for Pastoral Ministry before they can be recommended by clergy session of annual conference. (In May – before appointed)
- IV. Work to be Reviewed: Transcripts, report of clergy mentor.
- V. Voting/Decisions for Licensed Local Pastor
 - A. There will be a written ballot with a 2/3 majority needed for approval.
 - B. Possible decisions:
 - 1. Recommendation for License.
 - 2. Continuance as Certified Candidate. The committee would like for the candidate to do some more work before recommending for local pastor. They will make specific suggestions for a growth agenda and may name someone with whom to do that work. Progress toward that growth agenda should be made and reported on at the next meeting with the dCOM (unless given a different deadline by the dCOM).
 - 3. Discontinuance of Candidacy. The District Committee on Ordained Ministry does not believe that the candidate's call to licensed or ordained ministry matches the call as it is understood by the Rio Texas Annual Conference of The United Methodist Church. Options available to the candidate:

- a. To explore their call to be a lay member of a congregation.
 - b. To explore their call to ordained or licensed ministry with another annual conference or denomination.
 - c. To respond to the previously suggested growth agenda from the dCOM and reapply for certification as candidate in a minimum of one year.
- VI. Other Levels of Local Pastors (see ¶315-20)
- A. Interview of LP continuance (¶315-20)
 - B. Interview for Associate Member (¶321-322)
 - C. Interview for Provisional Membership (¶324-327)
 - D. Upon recommendation for Associate or Provisional Membership, dCOM will share the steps required.

Report of the Candidacy Mentor

Here is some of the kind of information that the dCOM or conference board will be looking for in a report from the candidacy mentor:

1. How was the candidate fully engaged in the process?
2. How did the candidate claim ownership of the issues outlined?
3. What evidence was there that the candidate made progress in the areas of concern? Why or why not?
4. What issues are left to be addressed? Are these unfinished or new issues uncovered in this process?

Self-Report of the Candidate

When a candidate is assigned a self-report of contingency work, it should contain the following information:

1. How and when did you do the work?
2. Reflect on how that experience at the time and now relates to the areas of concern and by the dCOM or conference board.

What's different now? Where have you grown in relation to the areas of concern lifted up? What has been the result of having done this work?

CHAPTER 6

Recruitment and Enlistment

The Board . . . shall . . . assume the primary responsibility for the enlistment and recruitment of ordained clergy Par. 635.2 (a)

INTRODUCTION

The Board is to be inclusive in its recruitment plan, which includes women and men of all races and ethnic origins and guide those persons in the process of education, training, and ordination. . . Persons recruited should have an understanding of and appreciation for persons of different racial and ethnic heritages. (See the Qualities of Missional Clergy Leaders in the Handbook.)

As the Board of Ordained Ministry (BOM) of the Rio Texas Annual Conference, our effort to Create a Culture of Growth through recruitment and enlistment of candidates for Ordained ministry especially pertains to one of the five pillars that our denomination is emphasizing which is: *Calling Forth Principled Christian Leaders*. We will be intentional in achieving this goal by engaging a holistic approach that includes our efforts to resource and support on all levels of our Conference where recruitment and enlistment for ministry occurs. We begin our efforts in support of recruitment and enlistment that occurs at the local church level. We continue our efforts with emphasis upon Conference Youth Ministries, Campus Ministries, Seminaries, and other extension ministries, utilizing resources of technology, scholarships, incentive grants, clergy mentors, and other resources from the Board of Ordained Ministry.

RESOURCING AND SUPPORTING THE LOCAL CHURCH

The BOM shall provide training for pastors and Staff Parish Relation Committees (SPRC's) in the Rio Texas Annual Conference. The training shall be designed to assist them in engaging persons expressing a sense of calling to ministry as vocation. The Board will include in that training information about existing resources available to assist them in this effort, utilizing resources from our Conference, such as Conference-wide youth events, resources found on our Board of Ordained Ministry website, and that from the website of the General Board of Higher Education and Ministry, to name a few. We will continue to develop strategies to resource and support local church pastors and SPRC's. We will also create ways to partner with District Superintendents in order to utilize opportunities that become available at district meetings and district training events to help train clergy and SPRC's in this way.

COORDINATING WITHIN THE RIO TEXAS ANNUAL CONFERENCE

The BOM will coordinate and collaborate with the entities of the Rio Texas Annual Conference. As a member of the Uniting Table and the Developing Leaders Visioning Team, the BOM utilize other persons who work with the various age groups within the Conference. The BOM will share the qualities of a missional clergy leader as the standard for which they are searching.

The BOM will collaborate with the Vitalizing Congregations Vision Team and with the Office of Clergy Development. The various age-level groups include children, youth, and young

adults as potential resources for leaders, as well as, the middle-age adults, etc. All persons are viewed for potential clergy leadership.

COORDINATING OUTSIDE THE RIO TEXAS ANNUAL CONFERENCE

Connections between the BOM and the Directors of Campus Ministry are to be well maintained. The BOM shall work with Directors of Campus Ministries for a unified approach to clergy recruitment. The BOM and the dCOMs shall take a proactive approach to recruiting potential clergy.

ANNUAL SEMINARY VISITS

In an effort to remain connected with candidates for ministry who are positioned to serve in our Annual Conference, representatives from BOM shall make annual visits to seminaries where our candidates are attending. In most cases we will join the Bishop, Cabinet members and other Conference leaders, but our goals in addition to remaining connected with them will be to ensure that the candidate is clear about our system of preparing candidates for ordination, to inform them of resources available to them, and to answer any questions they may have for us regarding our work with them. A secondary purpose of seminary tours will be to recruit candidates who may be interested in transferring into our Annual Conference where the opportunity becomes available.

SCHOLARSHIPS

The BOM will continue to support students attending seminary and planning to join our Annual Conference with scholarships based upon availability of funds. In providing scholarships, our BOM will be sensitive to potential candidates who are younger, thereby having more time to serve in our Annual Conference. Also, our BOM will give special consideration to potential candidates who display cultural proficiency, or the ability to serve across cultural lines, which is an identified attribute or characteristic that will be increasingly necessary for service in our Conference. As available, book money shall be made available to students from our Annual Conference. Finally, the BOM will continue to promote and develop the "Then Sings My Soul" endowment which supplies the funds for our scholarships. Qualifications for scholarships and book money are as follows: student must be a certified candidate and be taking at least 12 credit hours. Applicant is to review the Qualities of a Missional Clergy Leader and include in writing how he/she fills those qualities or has worked in a way that shows fruits of a mission outreach events. Deadline for scholarships is July 1st each year for the coming year.

DATABASE OF ALL PERSONS WHO EXPRESS A CALL TO MINISTRY

To assist the BOM in keeping track of persons experiencing a call to ministry, a database shall be maintained in a designated office of the Annual Conference containing the names and contact information of all individuals referred to us. In addition to assisting the BOM in keeping track of these individuals, this database will help the BOM track their progress toward their response and journey into candidacy, mark connections made with their mentors, and to ensure that we follow through with them appropriately.

CHAPTER 7

CANDIDACY AND CANDIDACY FORMS

The licensed and ordained ministry is recognized by The United Methodist Church as a called-out and set-apart ministry. Therefore, it is appropriate that those persons who present themselves as candidates for licensed or ordained ministry be examined regarding the authenticity of their call by God to set-apart ministry. (Par. 310)

AN OVERVIEW

- Candidacy is a vocational decision-making process, developed by GBHEM in consultation with the General Board of Discipleship and the General Board of Global Ministries.
- Candidacy for licensed and ordained ministry is the first formal step toward annual conference membership and ordination as a deacon or an elder, or for licensing for pastor ministry in The UMC.
- Candidacy begins when the potential candidate inquires about ministry and continues until that person is commissioned as a provisional member or is approved, appointed, and licensed as a local pastor. Candidacy also ends if a person withdraws from candidacy or is denied by the dCOM or BOM.
- Forms needed by candidates, charge conferences, dCOMs and BOMs related to candidacy are linked at the end of this chapter and posted on the GBHEM website.

BASIC CANDIDACY RESOURCES

- *The Christian as Minister: An Exploration Into the Meaning of God's Call* – Provides a discussion on the call to ministry and the many ways to serve in The UMC. It is based on the concept of servant ministry and servant leadership presented by the Council of Bishops and affirmed by the General Conference.
- *Fulfilling God's Call: Guidelines for Candidacy* – An exploratory and procedural study completed through participation in a candidacy mentoring group or through conversations with a candidacy mentor. Candidacy mentors are trained through the BOM and assigned by the dCOM in consultation with the district superintendent and vocational discernment coordinator. Available in English and Spanish through the online candidacy system upon registration for candidacy.

THE CANDIDACY PROCESS

The basic requirements for candidacy are listed in Par. 310- Par. 314.

The 2012 General Conference approved and encouraged the use of a vocational discernment coordinator to coordinate the candidacy mentoring process (Par. 635.1). The coordinator may be a volunteer or paid position, depending on an annual conference's needs. See more about the candidacy mentoring process in Chapter 5.

The Vocational Discernment Coordinator oversees the Inquiring Candidate portion and the Candidacy Summit, which is to be held twice a year.

Those beginning candidacy must meet the following conditions (Par. 310.1)

- Be a professing member in good standing of The UMC or a baptized participant of a recognized UM campus ministry of other UM ministry setting for a minimum of 1 year.
- In specialized circumstances, the dCOM may authorize other UM ministry settings to serve in the role of the local church for the purpose of recommending candidacy, and specify the persons or bodies that will serve in the roles of pastor, S/P-PRC, and charge conference. Candidate is to write their statement of call and answer the questions as detailed below.
- Write to the district superintendent, include a statement of call and in addition to the questions in Par 310.1(d) answer the questions in (310.2 (1) (1-vi) and request admission to the candidacy process. Ask for assignment of a candidacy mentor, and request registration in candidacy with GBHEM through the district superintendent.
- Study the candidacy resources adopted by the conference BOM.
- Write a statement of call. Through the pastor or someone equivalent – specified by the dCOM-the candidate requests a meeting of the S/P-PRC (or equivalent body specified by the dCOM) to consider the writing, and to recommend that person for candidacy. Be interviewed by the S/P-PRC in light of Wesley’s historic questions (Par. 310.1d, 1-3).
- Following a meeting with and recommendation by the S/P-PRC, meet with the charge conference (or body specified by the district committee), for recommendation to the dCOM for certification. The charge conference’s recommendation shall be by written ballot with two-thirds approval of the charge conference present.
- Graduated from an accredited high school or received a certificate of equivalency. Use Form 104 for the charge conference recommendation. See forms at the end of this chapter or on the GBHEM website.

Those seeking to become certified will (Par. 310.2)

- Request to meet with the dCOM.
- Prepare a written response to information requested in Par. 310.2a.
- Complete and release required psychological reports, criminal background and credit checks, and health assessment.
- Provide other information as the dCOM requires.
- Agree to make a complete dedication of themselves to the highest ideals of the Christian life as set forth in the UM Social Principles.
- Be interviewed by the dCOM in light of the mentor’s report, candidate’s written response to the questions, psychological assessment report, background checks, and health assessment. The dCOM may invite candidacy mentors to accompany candidates to the certification meeting.
- Receive a three-fourths majority approval of dCOM members present. Vote must be completed by written ballot (Par. 666.6).

- To ensure the recorded completion of candidacy, the certified candidate's qualification for GBHEM scholarships, and seminary receipts of MEF funding, the decision about certification recommendation must be recorded in the online candidacy system following the dCOM decision.

Continuation of Candidacy

- Orientation to Ministry (sponsored by the BOM) is required for all candidates for licensed and ordained ministry. Attendance at the orientation and becoming a certified candidate may be sequential or concurrent (Par. 312). See Chapter 6 or more details.
- An individual may continue under the supervision of the dCOM as a certified candidate for 1-12 years until becoming a provisional member of the annual conference, receiving an appointment as a local pastor, or withdrawing or being discontinued from candidacy for licensed or ordained ministry (Par. 314, Par. 324.1).
- During this time, candidates continue to work with candidacy mentors who monitor the candidates' educational, spiritual, and vocational goals

FLEXIBILITY AND CIRCUMSTANCES

Although there is an order to decisions about candidacy – moving for the candidate and mentor to the P/S-PRC and charge conference, and then to the dCOM – there is flexibility in arranging the way each candidate discerns vocational call. Some candidates already have made most of their vocational decisions and are preparing for ordination as a deacon or an elder through college or seminary studies. Others may be deciding how they are called to pursue ministry as a second career, may be entering candidacy with English as a second language, or may be discerning the different orders of ordained ministry.

It is important to consider background, experience, education, training, and circumstances, and to allow flexibility to move through the candidacy process (Par. 310.2b). Most candidates will likely meet with a mentor before being recommended as a candidate by the P/S-PRC and the charge conference (or equivalent bodies). However, other candidates may receive a charge conference recommendation before applying for candidacy through the district superintendent. District committees can be flexible with the order in which a candidate moves through the beginning stages of candidacy, provided that the requirements of Par. 310 are complete prior to certification by the dCOM.

The Rio Texas Annual Conference allows candidates to pursue studies and undergo psychological testing in their preferred language. It is important that the district committees on ministry and candidacy mentors advise candidates of this option at the outset.

GOALS OF CANDIDACY

For the Candidate:

- Explore the vocational options of lay, licensed, and ordained ministry in The UMC, and understand personal and professional ministry development needed in order to reach decisions that best express a faithful response to God's call.

- Respond to God’s call in a way that is faithful to the candidate’s gifts and grace, while partnering with the annual conference to discern ways to serve in ministry.

For the Annual Conference and UMC:

- Provide the environment and opportunity to discern God’s call.
- Offer thoughtful resources and settings to examine and affirm personal and vocational gifts and choices, whether for lay, licensed or ordained ministry.
- Enable the church to provide pastoral care to candidates and their families, friends, and ministry settings.
- Examine the calling, grace, gifts, and potential effectiveness of those who present themselves as candidates for lay, licensed or ordained ministry.
- Enlist, assess, encourage, and recommend effective candidates and clergy leaders to serve The UMC.

CANDIDACY FORMS

These forms can be found at www.gbhem.org:

Form 102: Biographical Information Form

Form 103: Medical Form

Form 104: Declaration of candidacy

Form 105: Application for clergy relationship

Form 109: Theological school recommendation

Form 112: Request for psychological assessment packet (Sample only: must be completed online in OCAS)

Form 113: District committee certified candidate approval form (Sample only: must be completed online in OCAS)

Form 114: Candidacy disclosure form

Form 115: Candidacy renewal

For more information contact GBHEM’s director of Candidacy, Mentoring and Conference Relations, candidacy@gbhem.org or 615-340-7374

Overview of Candidate Formation and Candidacy Summit

Candidate Formation Process

Phase 1: Inquiring Candidate (IC)

1. A person perceives a call to ministry
2. Member of a United Methodist Church (or a recognized UMC campus ministry) for at least 1 year immediately preceding candidacy, including a year of service in some form of leadership. (¶310.1a)
3. Contacts home church pastor
 - a. Meets with pastor to discuss call to ministry
 - b. Reads and discusses *The Christian as Minister* with pastor. The book is available at www.cokesbury.com.
 - c. IC has pastor sign Candidacy Summit Application

4. Contacts District Superintendent/District Office requesting to begin candidacy.
 - a. Sends letter or email to District Superintendent/District Office (§310.1a) indicating the following:
 - i. Completion of *The Christian as Minister* and email/phone number of pastor.
 - ii. Name/contact information of ministry setting (local church/campus ministry, etc.)
 - iii. Description of involvement in ministry setting and fruitfulness of ministry. (§324)
 - iv. Statement of call (1/2 page).
 - v. Request entrance into process.
 - b. IC completes Candidacy Summit Application with District Superintendent signature and mails to Conference Office with application fee -- \$75.00.
 - c. IC is entered into OCAS system by District Superintendent (or designee of DS) and is assigned a candidacy mentor. When entering the candidate for the first time, the name of the Conference Vocational Discernment Coordinator is entered as the mentor. Assignment of mentors will take place at the Candidacy Summit.
 - d. District Office and dCOM chair are in regular communication regarding candidates for ministry, their progress and any changes taking place in their status.
5. IC completes candidacy online enrollment, and pays the \$75.00 enrollment fee to receive *Fulfilling God's Call: Guidelines for Candidacy* from GBHEM.
6. All required paperwork will be collected at Candidacy Summit.

Phase 2: Exploring Candidate (EC)

1. Prepares for and attends a Candidacy Summit. Meets with Mentor Group four times over the five months following the Candidacy Summit.
2. Mentor contacts Clergy Development Office to indicate candidate's readiness to take Physical and Psychological assessments (if not already initiated at the Candidacy Summit).
3. Completes Physical and Psychological assessments

Phase 3: Declared Candidate (DC)

1. In consultation with Mentor, determines readiness to declare candidacy.
2. Contacts local church pastor or equivalent in ministry to request recommendation meeting/interview with P/SPRC or equivalent body specified by the dCOM for recommendation to become a Certified Candidate.

3. Submits transcript or copy of diploma providing proof of graduation from accredited high school or certificate of equivalence and/or transcript from college/university providing proof of graduation.
4. Mentor submits mentoring report to dCOM to include the following:
 - a. Brief description of candidate's grace, gifts, fruit and promise for effectiveness in licensed or ordained ministry as mutually agreed upon by Candidate and Mentor.
 - b. Ways candidate has used useful information in developing his/her understanding of self and licensed or ordained ministry.
 - c. Attendance/participation at mentoring group sessions.
 - d. Other insights or comments about the Candidate that will enable dCOM to better understand the Candidate.
 - e. Report is signed by both the Mentor and the Candidate.
5. Completes the written requirements for interview with the P/SPRC or equivalent body specified by the dCOM, as well as Candidacy Certification interview with dCOM.
 - a. A written statement of call as outlined in *The Book of Discipline* (§310.2a(i)-(vi).
 - b. Responses to Wesley's historic questions outlined in *The Book of Discipline* (§310.d.)
 - c. Written agreement to the highest ideals of the Christian life as outlined in *The Book of Discipline* (§304) and (§310.2d.)
6. Completes the interview with P/SPRC (or equivalent body specified by dCOM) with the outcome being either:
 - a. Recommended, in which case pastor or equivalent contacts District Superintendent to request special session of the Church or Charge Conference (or equivalent body specified by dCOM) for the purpose of considering recommendation of candidate to dCOM.
 - b. Not recommended, in which case the Candidate contacts the dCOM chair.
7. Mentor submits mentoring report to dCOM to include the following:
 - f. Brief description of candidate's grace, gifts, fruit and promise for effectiveness in licensed or ordained ministry as mutually agreed upon by Candidate and Mentor.
 - g. Ways candidate has used useful information in developing his/her understanding of self and licensed or ordained ministry.
 - h. Attendance/participation at mentoring group sessions.
 - i. Other insights or comments about the Candidate that will enable dCOM to better understand the Candidate.
NOTE: Additional comments are not to be evaluative.
 - j. Report is signed by both the Mentor and the Candidate.

8. Church or Charge Conference
 - a. Pastor sends completed form #104 to District Office with the following information:
 - i. Charge Conference vote on recommendation of DC by written ballot:
 1. Recommended by 2/3 majority of those present and voting.
 2. Not recommended, in which case Candidate contacts dCOM chair.
9. dCOM Candidacy Certification interview
 - a. Written ballot with ¾ majority required to certify
 - b. dCOM completes Form #113 for Candidate's file
 - c. If approved for certification, dCOM chair contacts Mentor who enters Candidate's status in Online Candidacy System.

Phase 4: Certified Candidate and Recertification

1. Annual recommendation by Charge Conference
2. Annual Re-Certification by DCOM
 - A. Two Tracks
 1. Certified (Local Pastor track)
 - a. Attend Licensing School
 - b. Application approved by DCOM, then affirmed by the BOM.
 - c. Approved at Clergy Session and Licensed as a Local Pastor
 - d. Attend Course of Study
 2. Provisional Elder or Deacon
 - a. Certified Candidate for minimum of 1 year, maximum of 12 years
 - b. Completion of educational requirements
 - c. Application approved by DCOM, then BOM
 - d. Approved at Clergy Session and Commissioned as Provisional Elder or Deacon

COACHING PASTORS FOR RIM

For Residency in Ministry (RIM), the Board will use Coaching Pastors as the link between the Provisional Member, the Board, and the church. The Board will train the coaching pastor before the new RIM class begins. The trainer is Dr. Phil Maynard, approved by Dr. Ruben Saenz.

Coaching Pastors will be chosen by the Co-Chairs of the RIM class, in consultation with the Leadership Team before they are contacted. Approved and trained coaches are found in the office of Dr. Ruben Saenz.

So what is Coaching?

First of all, coaching is a partnership. It can be a partnership between a coach and a coachee or between a coach and a team or group.

Second, coaching is a mutual conversation that follows a predictable pattern leading to some form of action related to improved performance or improved relationships.

What are the characteristics of a coach?

We look at the characteristics of a good coach found in the handbook provided by Dr. Phil Maynard.

Coaches are:

1. Spiritually mature – strong faith, growing as a disciple, regularly practicing the disciplines of a spiritual life.
2. Finds joy in helping others by successful – the coach rarely gets the limelight.
3. Relational – the key to coaching is the relationship that is developed. The coach does not have to be an extravert but needs to like people.
4. Self-aware – the coach must know his/her strengths, baggage, and behavioral preference.
5. Action-oriented – without action there is no coaching.

Therefore, the use of coaches with RIM emphasizes the Provisional Member, not the coach. The provisional member develops their goals, monitors the goals, and reports to the coach how the goals are growing his/her abilities as a minister. The RIM participant shares these goals with the SPRC, District Superintendent, Senior Pastor and reports on the progress to these different individuals.

CHAPTER 8

BOARD OF ORDAINED MINISTRY REGISTRARS

The board of ordained ministry shall elect a registrar and such associate registrars as it may determine; one such associate registrar to be given responsibility for candidacy, including giving leadership to the training and guidance of mentors in each district. A staff executive may be named by the board to fulfill the functions of registrar. (Par. 635.3)

ORGANIZATION

The Executive Officer of the Board (EOB) shall be the registrar of the Rio Texas Annual Conference BOM. The BOM shall elect associate registrars from its membership to work with the EOB.

TYPES OF REGISTRARS

Candidacy Registrar

The C Executive Officer of the Board shall be the candidacy registrar. Duties include:

1. Maintain records on the progress and status of candidates until they are received into provisional members, licensed as local pastors, or discontinued.
2. Collaborate with the vocational discernment coordinator to train and oversee the work of candidacy mentors.
3. Interpret the process for those seeking certified candidacy.
4. Work with GBHEM in maintaining the candidacy application system, if used.
5. Assures that all files are electronically housed from a central location.
6. Assesse folders with the checklist provided by GBHEM (see Chapter 5 District Committee)

ASSOCIATE REGISTRARS

Deacons Registrar

1. Maintains complete personnel records on all candidates for the Order of Deacons, and those seeking certification in specialized areas of ministry. This responsibility is shared with the Executive Officer of the Board.
2. Inventories electronic files for candidates recommended for Provisional Membership.
3. Maintains records for diaconal ministers.
4. Communicates with GBHEM regarding the interpretation of the Discipline and assessment of credentials.
5. May be the contact person for deacons, diaconal ministers, and those who have certification in specialized ministry, concerning any changes in their conference relationships (see Chapter 14).

Elders Registrar

1. Maintains complete personnel records on all candidates for the Order of Elders, associate members, and local pastors. This responsibility is shared with the Executive Officer of the Board who keeps all files electronically.
2. Maintains communication with GBHEM regarding Discipline interpretation and credential assessment.
3. May be the contact person for elders, provisional elders, and associate members concerning changes in their conference relationships (see Chapter 14).
4. Inventories all files of candidates recommended for Provisional or Associate Membership before packets are sent from the Interview/Examination Chair.

Local Pastor Registrar

1. Works with the district Committee on Ordained Ministry (dCOM) in matters related to training, support, and supervision of local pastors and associate members.
2. Maintains a personnel file on all local pastors and associate members.
3. Approves all registrations for the Course of Study and the Advanced Course of Study.
4. Keeps records of those in the Course of Study and reports the educational progress to the annual conference.
5. Communicates with GBHEM on the interpretation of the Discipline and transcript evaluation for credit in the Course of Study or Advanced Course of Study.

Other Registrars

The Chair of the BOM may name additional associate registrars as needed.

RESPONSIBILITIES MANAGED BY THE BOM REGISTRAR(S)

Candidate Relationships Including

1. Providing candidates with written information of all Disciplinary and conference requirements for licensing, associate, provisional and full membership; and inform them of all scheduled deadlines and required meetings.
2. Inform district committees on ordained ministry of firm deadline for application for provisional or associate membership: June 1 of previous year before intended commissioning or recognition as associate member. Complete files must be sent to registrars by that date. **Late or incomplete files may not be considered.**
3. Inform ordained clergy from other Christian denominations seeking to serve appointments in The UMC (Par. 346) of firm deadline for application for recommendation to clergy session: **March 1 before upcoming annual conference session.** Complete file, including results of psychological testing and all other materials required, must be sent to registrars by that date. **Late applications and incomplete files may not be considered.**

4. Communicate promptly the recommendations and decisions of the BOM and the reasons behind them. Candidates shall receive written and verbal communication regarding all decisions of the COM and BOM (Par. 666.11).
5. Answer questions and give assistance upon request.

Disciplinary Requirements for the Registrar(s) are Outlined (Par.635.2 and 635.3)

1. Keep full personnel records for all candidates for ordained ministry under the care of the board (Par. 635.3a). The GCFA guidelines for record-keeping are included in Chapter 6 of the Rio Texas Board Handbook.
2. Certifying to the annual conference pertinent information and recommendations concerning each candidate (Par. 635.3b)
3. Ensuring the confidentiality of the interview process for the candidates while providing necessary and required information to members of the BOM and the executive session of the clergy as needed (Par. 635.2m)

REPORTS AND RECORD-KEEPING

The registrar’s report to the clergy session of the annual conference shall contain all board recommendations for conference action. The registrar(s) shall be prepared to provide all information necessary for making a decision (Par. 635.2m). Copies of the report shall be retained for future reference and shared with appropriate church bodies (such as GBHEM, GCFA, annual conference secretary, etc.)

1. Forwards an acknowledgment of transfer to the pastor of the local church where each newly elected provisional and associate member held membership and transfers membership of candidates from the local church to the annual conference when they become local pastors, provisional members, or ordained deacons or elders. The transfers must be acknowledged by letter or by the standard forms for transfer of local church membership (Par. 635.3b)
2. Keeps a record of the students in the Course of Study and reports to the conference when required (Par. 635.3c). At the completion of work in the Course of Study a grade report and student performance information is sent to the registrar. At the beginning of the calendar year, an annual report on the status of every local pastor is sent from GBHEM’s Course of Study Registrar to the registrar for local pastors who is responsible for maintaining a complete personnel file on every local pastor. This file includes all correspondence and Course of Study reports. A report on the progress of every local pastor in the Course of Study is made each year to the clergy session.
3. Files with the bishop’s office a copy of circumstances involving the discontinuance of provisional membership or termination of the local pastor status (Par. 635.3d). It is important to record the circumstances related to the discontinuance of a provisional member or a local pastor. One copy is placed in the office of the bishop and another in the permanent personnel records of the annual conference if those records are maintained by the conference secretary or someone outside of the bishop’s office.

ADMINISTERING DIACONAL MINISTRY AND CERTIFICATION IN SPECIALIZED MINISTRY PROCESS

The EOB the registrar for the division of deacons shall administer the diaconal ministry and certification in specialized ministry process.

CERTIFICATION IN SPECIALIZED MINISTRY

Files are maintained on each candidate for certification and include

1. Application for certification (with picture, bio, college and seminary transcripts, report of completed certification studies, personal references, and all correspondence with or about the candidate).
2. Service record, a biennial review of professional leadership, and all recommendations made by the BOM.

RECORDS OF DIACONAL MINISTERS

The BOM shall provide continuing support and management of consecrated diaconal ministers using the policies described in Par. 301-317 of the Book of Discipline. (Par. 635.2u). This includes maintaining:

1. Application for candidacy, bio material, statements of academic progress, college and seminary transcripts, and report of completed study.
2. Application for consecration, charge conference letter, health report, and record of certification and/or commissioning.
3. Service record, annual report, and all recommendations made by BOM.

For more information contact GBHEM's director of Candidacy, Mentoring and Conference Relations, candidacy@gbhem.org or 615-340-7374.

Ministers of Other Christian Denominations Seeking Appointments in the Rio Texas Annual Conference (Paragraph 346.2)

1. All requests are referred to the Board of Ordained Ministry through the Office of Clergy Development.
2. The Director of Clergy Development works with the District Superintendent to determine whether to initiate the process for requesting an appointment as a "minister of another denomination." The deadline to begin processing is February 1 for consideration in the coming appointive year.
3. If recommended by the District Superintendent to proceed in the process, the personnel file for the clergy is completed as required in Paragraph 346.2. This includes:
 - a. Letter of Application (Initial request in writing, can be a copy of an email)
 - b. Biographical Information Form (Form 102) with a photo if possible
 - c. Misconduct Disclosure Form (Form 114)
 - d. Background check (letter from Assistant to the Episcopal Office)
 - e. Credit Check (letter from Assistant to the Episcopal Office)

- f. Certificate of Good Health (OD clergy are not required to have physicals at IMED nor required to use Form 103; a certificate or form used by personal or family physician attesting to good health will suffice.)
 - g. Official College and Seminary Transcripts, as applicable
 - h. Copy of Ministerial Credentials
 - i. Letter from appropriate judicatory representative stating:
 - i. The clergy is in good standing with home denomination
 - ii. Ministerial credentials are valid and active/current
 - iii. There are no conditions such as warnings, censure, etc. in force
 - iv. Judicatory grants permission to serve with United Methodist Church
 - j. Statement of Loyalty to United Methodist Doctrine, Discipline and Polity (see attachment)
4. Once items above are in the file, district will forward to Director of Clergy Development.
 5. Upon receipt of file, Director of Clergy Development will give approval for clergy to complete a psychological consultation assessment.
 6. Clergy is interviewed by a committee of the Board of Ordained Ministry after the psychological consultation is complete.
 7. The Board of Ordained Ministry presents its recommendations for ministers of other denominations (required in Paragraph 346.2) to the cabinet by March during the appointment process. Should the Bishop and cabinet decide to assign a clergy who has not met the deadline; the clergy can be appointed as "To Be Supplied."
 8. Two years under appointment as a "minister of another denomination" is required prior to transfer.
 9. As appropriate, the Rio Texas Bishop consults with other bishops or judicatory leaders.

**STATEMENT OF LOYALTY TO UNITED METHODIST DOCTRINE, DISCIPLINE, AND
POLITY MINISTERS FROM OTHER CHRISTIAN DENOMINATIONS**

Paragraphs 346 and 347 of the 2012 Book of Discipline of The United Methodist Church provide a way by which ministers in good standing in other Christian denominations may be approved annually to serve as pastors in United Methodist Charges while retaining their denominational affiliation. It is required that such ministers shall have their orders approved by the Bishop as valid, after consultation with the Cabinet and Executive Committee of the Board of Ordained Ministry, pending recognition by the vote of the clergy members in full connection at Executive Session.

Such approval must be granted annually by the ministerial members in Full Connection in the Annual Conference upon recommendation of the Board of Ordained Ministry.

Such approval provides for:

1. Service in an appointment within the bounds of the Rio Texas Annual Conference while retaining the clergy's own denominational affiliation.
2. Voice, but not vote in the Annual Conference.
3. Examination by the Conference Board of Ordained Ministry of any credentials as to their validity for service in The United Methodist Church.

Such approval requires an understanding, acceptance and willingness to support and maintain United Methodist doctrine (including sacramental practices of Infant Baptism and Holy Communion), discipline and polity and an agreement in writing to that effect.

In accordance with the above Disciplinary paragraphs, I understand and hereby agree to support and maintain the doctrine, discipline, and polity of The United Methodist Church while under appointment in the Rio Texas Annual Conference.

(Signature) (Date)

Printed Name: _____

Address: _____

Telephone: _____ Email Address: _____

Present Denomination: _____

Present Place of Service (If Applicable): _____

Please submit a photocopy of your credentials, a letter of good standing from an appropriate officer within your denomination affiliation, and the names and contact information of three references, along with this form, to your District Superintendent.

CHAPTER 9

Interviews and Examination Board of Ordained Ministry

PURPOSE OF THE INTERVIEW

Interviews are meant to determine readiness to begin ministry and/or effectiveness in ongoing ministry. Those seeking Provisional membership are assessed for readiness; those seeking Full or Associate membership are assessed for effectiveness and fruitfulness. Interviews are centered on the candidates' preparation and responses to questions; interview teams ask questions, listen, and reflect about candidates' responses after the candidates have completed their interviews.

Candidates to be interviewed by the Board of Ordained Ministry will have been selected, recommended, and sent by their District Committee on Ordained Ministry, after that committee has followed all requirements as set out by the United Methodist Book of Discipline. District Committees are to follow the guidelines as set forth in the Chapter 5 on District Committee on Ordained Ministry.

EXPECTATIONS OF CANDIDATES

Candidates coming before the Board for commissioning as Provisional Members are expected to exhibit readiness for ministry. This means the candidates have not only met all of the minimum requirements for commissioning, but that they will have also exhibited active participation in the local church and in the mission field. Readiness means they are poised to begin the process of leading others in ministry, and of being actively engaged in the mission field.

Candidates coming before the Board for ordination as Full Members or Associate Members are expected to be exhibiting effectiveness and fruitfulness in ministry. All people seeking Full or Associate Membership must meet all requirements as outlined in ¶304 of the United Methodist Book of Discipline. In addition, candidates for Deacon in Full Connection must have completed all requirements in ¶330. Candidates seeking membership as Elders in Full Connection must have completed all requirements as described in ¶335 of the United Methodist Book of Discipline. Those seeking Associate Membership must have completed all requirements in ¶322, as well as completion of the Written Examination for Elders.

Candidates are expected to have met not only the minimum requirements for ministry, but should have also shown the ability to lead others in ministry and produce fruit in the local church and mission field. Full or Associate members are expected to show leadership skills in their execution of ministry with and for others in the mission field.

All candidates are to exhibit fruitfulness, gifts for ministry, and spiritual depth – regardless of where they are in the process. Candidates are expected to be energetic, enthusiastic, and willing to serve in a variety of ministry settings.

All candidates are expected to be well versed in Methodist Christian Theology and Doctrine, and commit to teaching, upholding, and living by the Book of Discipline.

WRITTEN REQUIREMENTS

By July 1, the Interview Chair will send a written and detailed description of the written and preaching requirements for each candidate to submit before being interviewed. Also included in the packet will be evaluation forms from others who have been connected to the candidate in the aspects of practical ministry. Due dates for submission of materials will also be given to candidates.

TRAINING THE INTERVIEW TEAMS

A short training session shall be given at the beginning of the January interview time, before teams meet with candidates. The interview chairperson will conduct this training. Reading team conveners and interview team chairpersons will have already received their training prior to the BOM meeting.

DISSEMINATION OF READING MATERIALS

Reading materials will be sent out through the Conference office to members of reading teams. Each candidate's materials will be sent to the reading team member assigned by the Interview Chair..

TWO INTERVIEW RETREATS

The Chair of the BOM shall convene the BOM as necessary to complete the interviews for Probationary, Full, and Associate membership in a timely manner. All BOM members are expected to participate in the interview process of all candidates.

MAKE UP AND ORGANIZATION OF INTERVIEW TEAMS

Candidates will be interviewed in three areas of focus: **Call, Service, Disciplined Life; Theology and Doctrine; Worship and Proclamation**. Each team will consist of a chairperson, 3 reading team conveners, and reading teams. Therefore, each interview team will consist of anywhere from 10-15 members.

- **Role of the Chair:** To gather the team together; facilitate discussion and review of each candidate before the interview session; appoint a time keeper and a scribe for the interview time; welcome candidates as they enter the interview room; report written, final interview results to gathered BOM after all interviews have been conducted; be responsible for turning in final evaluation form to BOM chair after votes have been cast for each candidate; and be present when interview results are given to each candidate interviewed.
- **Role of Reading Team Convener:** Read all written work as assigned; gather insights from each team member after they have read the candidates' written work; assign questions to team members before candidates arrive for questioning; and be present when interview results are given to each candidate interviewed.
- **Role of Reading Team Members:** Read all written work as assigned; report reflections and insights for each candidate to reading team convener; be prepared to pose follow-up questions as needed.

BASIC CRITERIA FOR INTERVIEWS

When being interviewed by the Board of Ordained Ministry, candidates for Provisional Membership, Associate Membership, or Full Membership will be questioned in three general areas:

Doctrine and Theology – Candidates must demonstrate the ability to “communicate persuasively the Christian faith, both in written and oral form” (§304.1e). The doctrine and theology of The United Methodist Church will necessarily include intimate knowledge and articulation of Methodist principles, teachings, and theology. In addition, candidates must be able to demonstrate competency “in the disciplines of Scripture, theology, church history, and Church polity” (304.i). All candidates are expected to affirm fidelity to teaching, upholding, and supporting all practices of The UMC outlined in the Book of Discipline.

Call, Service, and Disciplined Life – Candidates are expected to clearly describe and authenticate their call to ministry, as well as to “dedicate themselves to the highest ideals of Christian life...by agreeing to exercise responsible self-control by personal habits conducive to bodily health, mental and emotional maturity, integrity in all personal relationships, fidelity in marriage and celibacy in singleness, social responsibility, and growth in grace and the knowledge of God.” (§304.2)

Worship and Proclamation –Candidates are expected to fully articulate theology and practice of worship and the sacraments, regardless of their specific ministerial call (§303.2). Candidates will be questioned in the areas of worship leadership, sacramental theology and practice, and Wesleyan teachings regarding all areas of the worship experience.

In addition to the above, candidates are expected to be able to connect the practice of ministry with the mission field beyond the walls of the local church. Therefore, candidates are expected to integrate theory and personal application in the ministry setting.

OTHER ROLES:

- An **Administrator** is appointed to make sure all interview teams are on time and to make sure that candidates know where to go. The Administrator is also responsible for getting candidates to and from their interview rooms and for assuring that the process outside the interview rooms is running smoothly.
- A **Hospitality Coordinator** is appointed to provide a space where candidates can meet together as they wait between interviews. The Hospitality Coordinator also arranges to have snacks and water available for candidates and their liaison pastors, if they are available to come for the interview session.
- The Administrator and the Hospitality Coordinator work together to assure that all candidates are prayed for before and after their interviews.

THE INTERVIEW

- Each team will meet and discuss scheduled candidates prior to their arrival, making notes regarding status, written work, sermon, etc.
- When candidate enters room, the Interview Chair will welcome the person, ask interview team members to introduce themselves, and have an opening prayer before the interview begins.
- Pre-assigned questions are asked first. Follow-up questions may be asked as needed. The total amount of time given to each candidate shall be scheduled.
- After the scheduled time expires, the interview is concluded.
- Time will be scheduled to reflect and assess the candidate's responses, and to make a final, written evaluation regarding the candidate.

REPORTING TO THE BOM

At a scheduled time all teams shall assemble and the full BOM shall hear from each team. After hearing the reports of each interview team and other reports relevant to the work of the BOM, the Board shall discuss each candidate and conduct a paper ballot vote to determine action.

VOTING

It is expected that all BOM members will be familiar with the expectations and requirements for Provisional Members, Associate Members, and Members in Full Connection before voting.

- BOM members shall be bound to ¶303-304 of the Book of Discipline to determine each candidate's fitness and eligibility for ordination.
- BOM members shall be bound to ¶322 of the Book of Discipline to determine a candidate's fitness and eligibility for Associate Membership.
- BOM members shall be bound to ¶324 of the Book of Discipline to determine a candidate's fitness and eligibility for Provisional Member.
- Votes are counted and shared with BOM members. The next candidate is ready to be discussed. Once action has been taken on all candidates before the BOM, the candidates are sent to the rooms where they had their first interview of the morning and results are shared by the interview team chair and the reading team conveners.

There are three options for each candidate: Recommend, Continue, or Discontinue. In the case of those applying for Provisional membership, continuance means the candidate will be returned to the care of the District Committee on Ordained Ministry

CHAPTER 10

Provisional Membership

“A person shall be eligible for election to a provisional membership in the annual conference by vote of the clergy session on recommendation of its Board of Ordained Ministry” (Par.324).

“Commissioning is the act of the church that publicly acknowledges God’s call and the response, talents, gifts and training of the candidate. The church invokes the Holy Spirit as the candidate is commissioned to be a faithful servant leader among the people, to lead the church in service, to proclaim the Word of God and to equip others for ministry” (Par. 325).

Requirements for Approval to Provisional Membership (Par.324)

Provisional membership recruitments are detailed in Par. 324 of the discipline. Provisional membership lasts neither less than 2 years nor more than 8 year. Par. 324.3-6 details the route for elder and deacon candidates, and for local pastors applying for provisional membership. Candidates for Associate Membership are required to be admitted to the Residency in Membership Program completed before election as an Associate Member of the Conference.

All persons admitted to RIM must have completed all educational requirements, including UMC history, theology, and doctrine. The Rio Texas Annual Conference does not elect to Provisional Membership during seminary. Candidates for RIM are interviewed by the Board, have a complete folder on file with the Elder or Deacon Registrar. All candidates must take sexual ethics before beginning their appointment at the local church.

The following votes and recommendations are required:

- Recommendation in writing by the dCOM to the BOM, based on a three-fourths majority vote of the dCOM by written ballot.
- Recommendation to the clergy session by a two-thirds majority of the BOM.
- Approval by a vote of the clergy session.

Expectations of Provisional Members and the BOM Residency Program

Provisional members are appointed to serve in a local church, extension ministry, or appointment beyond the local church. Provisional Members may be appointed to attend school.

Provisional Elders must have a full-time appointment while in RIM (See Par. 335). They receive a license for pastoral ministry. As such their responsibility is for the local church, until or if ordained for the order of the church.

Provisional Deacons receive a license for the ministry of the deacon. Provisional Deacons may be self-employed, and are expected to form an advisory committee in consultation with the DS for support, supervision, and evaluation of effectiveness. Provisional Deacons do not have to have a full-time appointment.

All participants in RIM are expected to attend every retreat and to fully participate in the small groups and to develop a discipleship project for review at RIM.

Residency in Ministry Program

The Rio Texas Annual Conference program shall include:

- Nurture and ongoing development for effectiveness in ministry
- Continuing theological integration with practical ministry
- Clergy Coaching with an ordained Elder/Deacon
- Participation in a peer covenant group for spiritual formation
- Participate in two self-assessment tools:
 1. The I.D.I. for cultural awareness
 2. The D.I.S.C. for leadership style
- A Discipleship Project that reflect the mission field

The goal of RIM is to form missional clergy leaders for the mission field. The client is the mission field and for whoever lives around the local church. RIM incorporates the mission of The UMC: To make disciples of Jesus Christ for the transformation of the world.

The residency program is a holistic program, including connecting theology and praxis, discernment, covenant-making and keeping, spiritual formation that allows time and space for the Coaching Pastors and the provisional member to work together in developing effectiveness in the provisional members' practice of ministry.

The Residency in Ministry program shall consist of 9 retreats. The provisional members and the coach will meet in-between with attention to the goals developed by the participant. The Coach will go to the provisional member's local church for an on-site visit. The Coach and provisional member will decide when and under what format the visit will take.

Throughout the two-year period, the coach and the provisional member will monitor and adjust the growth agenda. Goals may be changed, if necessary. The main focus is growth in effectiveness for the provisional member, development of the pastoral identity, keeping covenantal relationships confidential. Above all, the provisional member can learn how to seek help and when, provide help to others, so that the learning process flows in all directions.

The provisional member is to learn self-care so that he/she takes the Sabbath seriously, spends time away from the church, takes regular vacations, spends time in renewal, learns the importance of practicing spiritual disciplines.

Assessment

The provisional member engages in self-assessment and shares their findings with the coach, the RIM team, SPRC, Senior Pastor, and DS. This is an invaluable tool for the long-term clergy life.

Chapter 11

ONGOING FORMATION

Throughout their careers, clergy shall engage in continuing education for ministry, professional development, and spiritual formation and growth in order to lead the church in fulfilling the mission of making disciples for Jesus Christ. This shall include carefully developed personal programs of study augmented periodically by involvement in organized educational and spiritual growth activities. Paragraph 351.1, The Book of Discipline, 2012

John Wesley set a high standard that all Methodists, especially Methodist preachers, would be lifelong learners. Indeed, in order to serve with vitality whether for forty years or four, United Methodist clergy need to be engaged regularly with spiritual disciplines, study of scripture, theology and ministry areas, as well as engaging in conversation with colleagues in ministry. This journey of personal and professional development involves being intentional about creating growth agendas and disciplined about seeking opportunities and resources. This journey is both individual and communal.

Ongoing formation should reflect consideration of the following qualities of missional leaders:

Primary Qualities of Missional Leaders:

- Cultural Proficiency—The ability to function effectively in a multi-cultural context
- Heart for Evangelism—The affinity to extend the Christian message to persons in the mission field
- Faith in Calling of God—A clear sense of faith and commitment inspired and anchored by God’s call
- Equipping and Developing Missional Leaders—Ability and commitment to developing missional leaders
- Catalytic Capacity—A capacity to be a catalyst for new ministry initiatives

Additional Qualities of Missional Leaders:

- Leadership Ability—Skills in providing principled Christian leadership
- Visioning Capacity—The ability to help establish, cast and pursue a vision
- Conflict Resolution Skills---The ability to manage conflict in a healthy and effective way
- Personal Life Management—This category includes time management, health and wellness, maintaining balance between vocation and family life, etc.
- Perseverance—One’s capacity to persevere in unpleasant or difficult circumstances

REQUIREMENTS

The following persons are required to develop annually a growth agenda of continuing education and ongoing formation for personal and professional development.

- Full-time local pastors who have completed the Course of Study

- Active associate members under appointment
- Active elders under appointment
- Active deacons under appointment
- Certified lay professionals

However, anyone in the above relationships involved in ongoing education (including enrollment in college, seminary, Course of Study, D. Min and Ph. D programs and clergy on leave of absence are exempt.

MINIMUM STANDARDS

Clergy are encouraged to utilize CEUs as a standard measurement for monitoring progress as a lifelong learning. The definition of a CEU shall be ten contact hours in instructional session or its equivalent under qualified leadership.

- Some events or courses will offer certification in CEU's. If not, that certification can be made based on the number of contact hours. For example, while on unit is ten hours, five hours equals 0.5 CEU and fifteen hours equals 1.5 CEU's, etc.
- Online continuing education, CPE beyond ordination, study travel and VIM trips are acceptable. It is recommended that a variety of learning opportunities be used each quadrennium.
- Twenty hours of reading and reflection is equivalent to one CEU.

Developing a plan for more than one year at a time will be beneficial and give opportunities to seek grants and other financial support and leaves for extended educational experiences.

ONGOING FORMATION AND FORMATION LEAVES

In accordance with paragraph 351.2 of The Book of Discipline, 2012, clergy members are to be granted at least one week each year and at least one month in each quadrennium for continuing education and spiritual growth. Such leaves are NOT to be considered vacation and shall be planned in consultation with the appointed charges.

In addition, a request may be made by clergy members who have held full-time appointments for at least six years to take a formational and spiritual growth leave for up to six months while continuing to hold an appointment in the local church. Paragraph 351.3 explains how such leaves may be arranged.

ACCOUNTABILITY

1. Annually, a form will be furnished with other charge conference records requesting a clergy member to list continuing education experiences and equivalent CEU's for the preceding calendar year. This form will be submitted to the P/S-PRC for signature by

the chair and to the district superintendent for signature and remains on file with other records.

2. During the annual evaluation of each clergy member, conversation should include the growth agenda for the coming year, necessary leave involved, and financial resources available. Consultation with the district superintendent for further information on these arrangements may be helpful as outlined in paragraphs 351.4 and 351.5.

SUPPORT

1. The P/S-PRC or its equivalent serves for each clergy member as a primary source of support for engaging in this lifelong journey of growth and vitality in ministry as outlined in paragraph 258.2g (8).
2. The district superintendent is also a partner with clergy in every ministry setting.
3. Clergy members are urged to find an accountability group of other clergy as a means of support on this journey. A great variety exists in these groups such as lectionary study groups, Emmaus Reunion Groups, clergy support groups, ministerial alliances or breakfast and lunch meetings. Participation in one such group on a regular basis helps clergy members deal with isolation and loneliness and can be a means of peer learning.
4. The Board of Ordained Ministry Ongoing Formation Team shall collaborate with appropriate conference offices to provide opportunities for ongoing support, nurture, and accountability.

CHAPTER 12

OPEN ITINERACY

See Par. 425.4; Par 4, Article IV; Par. 338; Par 425.1; Par. 162.F; Par 162 in the Book of Discipline for references.

The UMC and the Rio Texas Annual Conference will face continued challenges and wonderful opportunities for mission and ministry presented in a diverse society. We are committed to inclusiveness for minorities and for women in the ministry.

The commitment to inclusive leadership through open itinerancy includes cross-racial, cross-cultural appointments. The Rio Texas Board of Ordained Ministry takes up the challenges and opportunities as we face a changing future.

There are several areas in which the BOM is to play a major role:

1. The BOM will monitor and equip local churches, SPRC's with resources and/or training on the importance of open itinerancy.
2. The BOM will use the resource of the Intercultural Development Inventory. We will call for the BOM, the Bishop and Cabinet, dCOM's, SPRC's, and Lay Leaders to take the inventory for an understanding of their own cultural competency.
3. The BOM will assure that all interviews at the Conference and District levels include women and men, as well as, persons of other ethnic/racial groups.
4. The BOM will work with the Bishop towards its composition reflecting the culture in which it works.
5. The dCOM will be amenable to the BOM to also reflect the composition of the culture, both gender and racial/ethnic.

The BOM will access resources so that clergy can receive the necessary support and training. In addition, the BOM will review the composition of clergy in the Conference as to cultural/ethnic and gender statistics.

Diversity is more than cultural/ethnic and gender; it is also color, disability, marital status, and age. Access to resources and the candidacy process should not be limited to those who come to us, but also to those who emerge outside our usual boundaries. We are to go out and seek candidates who may not yet be within our purview.

APPENDIX

Candidacy Summit Application*

EXAMPLE

January 5-6, 2015

EXAMPLE

Mt. Wesley Retreat Center, Kerrville, TX
Rio Texas Annual Conference

Name: _____ Date of Birth: ___/___/___

Student: ___ Yes ___ No College or University Attending: _____

Gender: ___ Male ___ Female Expected Graduation Date: ___/___/___

Preferred Address: _____

City/State: _____ Zip: _____

Preferred Contact info:

Phone: _____ - _____ - _____ E-Mail Address: _____

Home Church: _____ District: _____

Primary Language: _____

I would prefer to have a translator for Candidacy Summit (Please check one): ___ Yes ___ No

Dietary Concerns: _____

___ I completed *The Christian as Minister* with Rev. _____ on ___/___/___

Pastor's Address: _____

Pastor's Phone: _____ - _____ - _____ Email: _____

Pastor's Signature: _____ Date: ___/___/___

___ I have requested admission into candidacy process by contacting the District Office and providing them with the required information stated in *Checklist for Inquiring and Exploring Candidates*.

Signature of District Superintendent: _____ Date: ___/___/___

___ I have enclosed \$75.00 for the Candidacy Summit Registration fee.

___ At the Candidacy Summit, I would like to complete the Psychological testing required of all candidates for ministry. In addition to the \$75.00 for the Summit, I have also included an additional \$150.00 for the Psychological testing. (You may choose to pay only 1/2 of the Psychological fee, with the remainder due before your final interview with the Psychologist.)

___ I need accommodations for the night prior to start of the Summit.

Please mail the completed application and applicable fees (Check payable to SWTC Treasurer) to:

SWTC United Methodist Center Treasurer

Attn: Candidacy Summit

16400 Huebner Road

San Antonio, TX 78248

Questions: Contact your District Office, or Rev. Tamara Strehli at tstrehli@sierravista.org or (325) 944-4041

Candidate Formation Checklist*

Phase One: Inquiring Candidate (IC)

- Perceive a call to ministry
- Member of any UMC or UM campus for one year (§ 310.1a)
- Contact home church Pastor or UM Campus Pastor
 - Meet with pastor to discuss call to ministry
 - Read and discuss *The Christian as Minister* with pastor. And upon completion have Pastor sign Candidacy Summit Application.
 - *The Christian as Minister* is available at www.cokesbury.com
 - [Download Candidacy Summit Application from www.umcswtx.org](http://www.umcswtx.org).
- Contact District Superintendent/District Office to begin candidacy
 - Send letter or email to District Superintendent/District Office (§ 310.1 b) indicating the following:
 - Completion of *The Christian as Minister* and email/phone number of pastor with whom you completed it
 - Name/contact information of ministry setting (local church/campus ministry etc.)
 - Description of involvement in ministry setting and fruitfulness of ministry
 - Statement of call (half- page)
 - Request entrance into process
 - Complete Candidacy Summit Application which District Superintendent signs.
- Mail Candidacy Summit Application with \$75 check by July 1 for August Summit or November 1 for January Summit. Psychological testing is required for all candidates for ministry. Testing may be taken at the Summit for an additional \$150.
- Complete Candidacy Online Enrollment
 - You will receive an email from candidacy@gbhem.org (put this in your safe senders list) with a link to register officially through the on-line interactive web site at <http://canapply.gbhem.org>. *Please do so immediately.*
 - You will receive another email with a link to the web site to pay the \$75 enrollment fee to receive *Fulfilling God's Call: Guidelines for Candidacy* (**this is a separate fee from the registration fee for Candidacy Summit**).
 - (**NOTE: DO NOT** take the on-line version of the psychological examination. The Rio Texas Annual Conference will have you do this locally).

Phase Two: Exploring Candidate (EC)

- Prepare for and attend a Candidacy Summit
- Create your own candidacy file and keep copies of all forms completed and all work submitted.
- Attend Candidacy Summit

- Meet with Mentor Groups four times over the six months following Candidacy Summit. Dates will be determined by your group at the Candidacy Summit. Video conferencing (i.e. Skype) will be a possibility for groups with large geographic distance between group members.
 - Complete required sections in *Fulfilling God's Call: Guidelines for Candidacy*.
 - Discern continuation to **Phase Three: Declared Candidate (DC)** and complete required steps. Information about this phase will be given at Candidacy Summit.

Phase 3: Declared Candidate (DC)

- High school degree or equivalent
- Complete Physical and Psychological assessments in coordination with the Office of Clergy Leadership and Development.
- Contact local church pastor or equivalent in ministry as specified by DCOM to request meeting/interview with P/SPRC or equivalent body specified by the DCOM for recommendation to become a certified candidate
- Complete the following written requirements for interview with P/SPRC or equivalent, and for DCOM interview:
 1. A written statement of call as outlined in the *The Book of Discipline* ¶310.2a
 - a) The most formative experience of your Christian life; b) God's call to licensed or ordained ministry and the role of the church in your call; c) your beliefs as a Christian; d) your gifts for ministry; e) your present understanding of your call to ministry as elder, deacon, or licensed ministry; f) and your support system.
 2. Answer Wesley's Historic questions outlined in *The Book of Discipline* ¶310.1d
 - a. *Do they know God as a pardoning God? Have they the love of God abiding in them? Do they desire nothing but God? Are they holy in all manner of conversation?*
 - b. *Have they gifts, as well as evidence of God's grace, for the work? Have they a clear, sound understanding; a right judgment in the things of God; a just conception of salvation by faith? Do they speak justly, readily, clearly?*
 - c. *Have they fruit? Have any been truly convinced of sin and converted to God, and are believers edified by their service?*
 3. Provide written agreement to highest ideals of the Christian life *The Book of Discipline* ¶304 and ¶310.2d
- Recommendation by charge conference or equivalent body as specified by the DCOM
 1. Pastor sends completed form #104 to District Office with the following information:
 - a. Charge Conference vote on recommendation of DC by written ballot:
 - b. Recommended by 2/3 majority of those present and voting.
 - c. Not recommended, in which case Candidate contacts DCOM chair.

2. Mentor submits mentoring report to DCOM to include the following:
 - a. Brief description of your grace, gifts, fruit and promise for effectiveness in licensed or ordained ministry as mutually agreed upon by you and you're your Mentor.
 - b. How have you responded to the information about the calling and the work of ordained or licensed ministry in the United Methodist Church?.
 - c. Attendance/participation at group mentoring sessions.
 - d. How do you respond to and use feedback from others?
 - e. What spiritual disciplines do you utilize on your journey with God?
 - f. Other insights or comments about you that will enable DCOM to better understand you.
 - g. Report is signed by both your Mentors and you.
4. You will be invited to interview with DCOM for consideration as a certified candidate.

Phase 4: Certified Candidate and Recertification

- Annual recommendation by Charge Conference
- Annual Re-Certification by DCOM
- Two Tracks
 2. Certified (Local Pastor track)
 - e. Attend Licensing School
 - f. Application approved by DCOM, then affirmed by the BOM.
 - g. Approved at Clergy Session and Licensed as a Local Pastor
 - h. Attend Course of Study
 3. Provisional Elder or Deacon
 - a. Certified Candidate for minimum of 1 year, maximum of 12 years
 - b. Completion of educational requirements
 - c. Application approved by DCOM, then BOM
 - d. Approved at Clergy Session and Commissioned as Provisional Elder or Deacon

Candidates District File Content Checklist

Name _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____ Date file begun _____

___ Biographical information report (Form 102)

___ Declaration of candidacy for ordained ministry and charge conference recommendation
(Form 104)

___ Written statement of call (¶310.1d)

___ Medical Exam

___ Written information based on ¶310.2a

___ Methodist Doctrine ___ Date

Completed

___ Candidacy mentor assigned

___ Polity ___ Date Completed

___ Candidacy mentor's report

___ History ___ Date Completed

___ Psychological assessment report

___ Medical Exam Form

___ Credit check

___ Criminal background check

___ Notarized statement regarding sexual misconduct and child abuse (Form 114)

___ Yearly Academic progress documents:

- ___ College Transcript indicating BA/BS degree when awarded
- ___ Seminary Transcript or Course of Study indicating progress to date
- ___ M.Div-Date Conferred/To Be Conferred

___ Online form 113 recording vote of certification

Date _____

___ Certification renewed

Date _____

_____ Date _____

_____ Date _____

_____ Date _____

___ Letter of recommendation to Board of Ordained Ministry for provisional membership

toward deacon's or elder's orders

___ File sent to BOM registrar

Date _____

___ Attach growth plan(s) & progress statement by dCOM Chair

BOM Handbook Chapter 2, The District Committee on Ordained Ministry, 2013

Revised for Rio Texas BOM Handbook 11/5/2014

**Local Pastor's District File
Content Checklist**

Name _____
Address _____

City _____ State _____ ZIP _____
Phone _____ Email _____ Date file begun _____
Current appointment (charge) _____
Date of appointment _____

Status ____ Full time ____ Part time ____ Student
 ____ Not currently appointed (License to be returned)

____ Certified as a candidate (§315.2a) Date _____

____ Completed Ordination to ministry (§315.2b)

____ Local pastor's licensing school completed and faculty evaluation and recommendation received (§315.2c)

Date completed _____ School location _____

Or

Completed 1/3 of M. Div. degree (§315.2c)

Seminary _____

____ Application for Clergy relationship to the annual conference (Form 105)

____ Examined by the dCOM (§315.2d) Date _____

____ Approved by BOM (§315.6b) Date _____

____ BOM registrar notified of LP status Date _____

____ Course of Study completed (Indicate if by correspondence)

1 st year ____	1 st year advanced ____
2 nd year ____	2 nd year advanced ____
3 rd year ____	3 rd year advanced ____
4 th year ____	4 th year advanced ____
5 th year ____	

LP license renewed (must be renewed annually)

Dates _____

Credentials (must be returned if no longer appointed)

BOM Handbook Chapter 2, The District Committee on Ordained Ministry, 2013

**District Committee on Ordained Ministry
Action Report to the BOM Registrar**

District _____

Candidate's Name _____

Candidate's Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

The district Committee on Ordained Ministry took the following action(s) regarding the person listed about (check all that apply).

Granted certified candidate status according to ¶666.6 (3/4 majority vote, written ballot)

Recommended (continuation) as certified candidate (¶313).

Certified as having completed the studies for licensing as a local pastor, the Orientation to Ministry, and is approved to receive the license for pastoral ministry when and if appointed (¶315).

Recommended to the BOM for continued eligibility for appointment as a local pastor (¶319).

Recommended for reinstatement of approval to be appointed as a local pastor (¶320).

Recommended for election to provisional membership toward deacon's orders (¶324.10).

Recommended for election to provisional membership toward elder's orders (¶324.10).

Recommended for associate membership (¶322.1).

Recommended for readmission to conference relationship:

To provisional membership (¶365).

After honorable or administrative location (¶366).

After leaving the ministerial office (¶367).

After termination by action of the annual conference (¶368).

Persons who are awarded the license for pastoral ministry, or who are continued in that status must be classified as one of the following (please check appropriate designation):

Full-time local pastor (¶318.1)

Part-time local pastor (¶318.2)

Student local pastor (¶318.3)

Signature of dCOM chair or registrar

Phone (with area code)

Email _____

Address _____

City _____ State _____ ZIP _____
____ Enrolled Cand. ____ Cert. Cand. ____ PT LP ____ FT LP ____ S LP

BOM Handbook Chapter 2, The District Committee on Ordained Ministry, 2013



District Committee on Ministry Certified Lay Minister Steps and Requirements

This document relates to Certified Lay Ministry as described in ¶ 271 of the 2012 Book of Discipline of the United Methodist Church and is the guide for those who would serve as CLM's in the Corpus Christi District of the UMC.

Before being interviewed by the District Committee on Ministry, a person seeking Certified Lay Minister status must:

- Be an active member of their local United Methodist Church
- Provide a letter of recommendation from the Pastor of their local church.
- Meet for a personal visit with the District Superintendent.
- Provide a letter of recorded vote by Church Council or Charge Conference, recommending the person as a candidate for Lay Ministry.
- Be a Certified Lay Servant, as defined by the District Committee on Lay Servant Ministries or equivalent conference structure (¶ 268 BOD). A copy of certification must be provided, along with a copy of the most recent Charge Conference minutes indicating Charge Conference recognition as a Certified Lay Servant.
- Provide a letter of recommendation from the District Superintendent.

When interviewed by the District Committee on Ministry, the candidate for Certified Lay Ministry shall demonstrate appreciation of the history, polity, doctrine, worship, and liturgy of the United Methodist Church through service in his/her local church. (¶ 271.2.c BOD)

After being interviewed and approved, the Certified Lay Minister will be required to be biannually interviewed by the DCOM, and to address the following criteria:

- Submit a written approval from the Charge Conference of the church in which they hold membership recommending them as a Certified Lay Minister.
- Meet regularly with a supervising pastor, and submit a letter documenting frequency of meetings and assessment of ministry from the supervising pastor.
- Choose one continuing education event, to be approved by the supervising pastor and DS, and provide evidence of attendance at the event.
- Provide a written document from the Pastor/Staff Parish Relations Committee recounting one example of "effective ministry" during the previous year of service.

Certified Lay Minister
S/PPRC Report to the District Committee on Ministry

Certified Lay Minister: _____ Evaluation Date: _____

Appointment: _____

What do you celebrate most about your Certified Lay Minister's work:

What areas of growth/learning would you recommend for your Certified Lay Minister:

Would you recommend your Certified Lay Minister for re-certification? YES NO

What counsel would you offer to the District Committee on Ministry and the District Superintendent as to the continuation of your Certified Lay Minister in leadership of your church?

Check one:

- We would like for our Certified Lay Minister to continue with us for another year.
 We would not like for our Certified Lay Minister to continue with us for another year.

Explain:

The District Committee on Ministry is responsible for annually evaluating and certifying all lay ministers in the district. Is there anything about your Certified Lay Minister or their work among you that you feel the District Committee on Ministry should know?



Behavioral Health Guidelines for Boards of Ordained Ministry

Division of Ordained Ministry
General Board of Higher Education & Ministry
www.gbhem.org/bom

Overview

In the process of selecting candidates for ministry, district Committees on Ordained Ministry (dCOM) and Boards of Ordained Ministry (BOM) must discern each potential candidate's "gifts, evidence of God's grace, and usefulness" (§§ 301.2, 605.7, 635.2h, 666.9, 2012 Book of Discipline). The constant pastoral concern for both the church and candidates is to maximize effectiveness in ministry (on the positive end of the continuum) and minimize ineffectiveness and harm to all involved, both now and in the future.

These guidelines seek to describe the boundaries of healthy functioning, beyond which distortions of health become serious problems for the church and its ministry as well as for the person involved. The central question is how experiences impact a person's inner being or spirit, and how a person's inmost spirit transforms behavior patterns (I Cor. 13, Romans 12). Concern about a person's mental and emotional status and behavioral patterns, including mental processing, emotional states, identity, personal boundaries, and responses to stress, are part of the pastoral concern in selecting candidates.

Since our ministries are treasures of God in earthen vessels (2 Cor. 4:7), we seek to discern how human vessels can be refined and strengthened in order to be more durable and useful in the ministry of Christ in the world. Where negatives exist, can they be sufficiently healed and transformed with the available resources to enable a candidate to incarnate love in ministry? Where positives exist, can they be used to strengthen trust, enable safety, and express grace and love in relationships without giving in to temptations and distortions? To address these concerns, the Division of Ordained Ministry's Advisory Committee on Candidacy and Clergy Assessment (ACCCA) offers these Behavioral Health Guidelines as a resource in candidate selection. As the title suggests, these are general guidelines rather than hard-and-fast regulations. They relate to behavioral health issues, broadly defined, that the committee believes are critical to effectiveness in ministry and the avoidance of misconduct.

Our primary purposes in this effort:

- Guide and advise dCOMs and BOMs.
- Assist BOMs in establishing their own standards for assessment.
- Provide a vehicle for BOMs to raise questions about standards for assessment.
- Flag areas of concern.



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

The ACCCA proposes standards in the categories listed below, along with brief rationales explaining our sense of their importance. Most candidates will meet these standards immediately, but some may evidence critical behaviors or conditions that would require further exploration. Questions are provided to facilitate this exploration. If the results continue to raise concerns, the Board or Committee may need to take some action, such as postponement of the candidacy process (for further exploration or remediation) or, in serious cases, permanent disqualification. Each recommendation or guideline requires interpretation on a case-by-case basis.

The Advisory Committee on Candidacy and Clergy Assessment welcomes feedback regarding these guidelines. Email the Executive Director of Candidacy and Conference Relations for the General Board of Higher Education and Ministry at candidacy@gbhem.org.

Definitions and Categories:

Category – a general area of concern.

Standard – a minimum requirement necessary to address the area of concern.

Rationale – an explanation of the standard.

Critical Behavior – a specific behavior or condition that indicates the standard has not been met.

Exploratory Question – a recommended question which may assist in assessing whether a critical behavior does indeed violate the standard.

Recommendation – a decision recommended when exploratory questions indicate that a standard is not met.

The following categories are addressed in this document:

- Alcohol Abuse/Dependence (p. 3)
- Chemical Abuse/Dependence (p. 4)
- Divorce or Infidelity (p. 5)
- Family Violence (p. 6)
- Legal (General) (p. 7)
- Legal (Sex-Related Crimes) (p. 8)
- Mental Illness (p. 9)
- Personal Finances (p. 10)
- Physical Health (p. 11)
- Pornography (p. 12)
- Sexual Misconduct (p. 13)
- Addendum: Definitions of Improper Sexual Contact (p. 14)



Category: Alcohol Abuse/Dependence

Standard:

The candidate demonstrates no present abuse or dependence upon alcohol.

Rationale:

Alcohol abuse (short-term intoxication) and/or alcohol dependence (chronic over-involvement) are mental disorders known to impair functioning in pervasive ways. Candidates who suffer from these disorders will have greatly limited effectiveness and are at much greater risk for professional misconduct.

Critical Behaviors:

- A history of drinking to the point of intoxication.
- A history of arrest for driving while intoxicated.
- A history of an arrest for public intoxication.
- Complaints by family or others regarding the candidate's use of alcohol.

Exploratory Questions:

- The "CAGE" questions below may be helpful: two or more "yes" answers predict alcoholism with about 75% accuracy.
 - Have you ever felt you should **C**ut down on your drinking?
 - Have people **A**nnoyed you by criticizing your drinking?
 - Have you ever felt bad or **G**uilty about your drinking?
 - Have you ever had a drink first thing in the morning to steady your nerves or get rid of a hangover (**E**ye-opener)?
- Where there is a history of alcohol use, the following questions may be helpful:
 - Are you currently abstinent, and if so for how long?
 - If you are abstinent, how and why were you able to become abstinent?
 - What are you currently doing to maintain abstinence? (Possible answers: Alcoholics Anonymous, outpatient chemical dependency counseling, other counseling)

Recommendation

- Consider requiring a minimum of one year's sobriety prior to certification for candidacy.
- If any of the critical behaviors are recent (within five years), then consider requiring a formal "substance abuse evaluation" by a certified chemical dependency treatment specialist.
- If there is clear evidence of alcohol dependence at any time, then consider requiring participation in Alcoholics Anonymous (AA) or equivalent program and continued involvement in such a program for not less than five years prior to certification for candidacy.



Category: Chemical Abuse/Dependency

Standard:

The candidate demonstrates no present abuse or dependence upon either non-prescribed pharmacologic agents or prescribed medications.

Rationale:

Chemical abuse and/or dependence are mental disorders known to impair functioning in pervasive ways. Candidates who suffer from these disorders will have greatly limited effectiveness and are at much greater risk for professional misconduct.

Critical Behaviors:

- Any use of illegal or non-prescribed substances, including but not limited to marijuana, cocaine, hashish, hallucinogens, sedatives, amphetamines or other stimulants.
- Misuse of prescribed pharmacological agents of any type.

Exploratory Questions:

- What is your history of chemical abuse or dependency?
- Are you currently abstinent, and if so, for how long?
- If you are abstinent, how and why were you able to become abstinent?
- What are you currently doing to maintain abstinence? (possible answers: Narcotics Anonymous, outpatient chemical dependency counseling, other counseling)

Recommendation:

- If the history reveals occasional and/or experimental use limited to an adolescent period, then consider requiring not less than five years of sobriety prior to certification for candidacy.
- If the history reveals any adult use of illegal substances or any misuse of prescribed pharmacological agent, then consider requiring a formal chemical dependency assessment from a credentialed chemical dependency treatment specialist. A period of not less than five years of sobriety prior to certification for candidacy would also be appropriate.



Category: Divorce or Infidelity

Standard:

If the candidate has been divorced, or if there is evidence of infidelity, the candidate must have done sufficient exploratory and reparative work to demonstrate and/or articulate the impact of the health of married life on quality of ministry.

Critical Behaviors:

- A divorce in the past three years.
- A history of having been married more than twice.
- A history of infidelity.

Exploratory Questions:

- If a recent divorce:
 - What steps have you taken to understand the nature of your own contribution to the dissolution of the marriage?
 - What steps have you taken to move yourself through a healthy grief process?
- If multiple marriages:
 - What steps have you taken to identify and deal with any dysfunctional patterns in intimate relationships?
- In either case:
 - Have you maintained fidelity in marriage? If not, what steps have you taken to understand your actions and decisions so as to safeguard current or future marriage covenants?

Recommendation:

- If there is a recent divorce (within 2-3 years), then the candidate should be able to articulate any dysfunctional patterns in intimate relationships and have taken steps to safeguard current or future marriage covenants.
- If there is insufficient evidence that sufficient exploratory or reparative work has been done, the Board may wish to recommend or require a course of psychotherapy and/or other conditions, such as a delay of one year.



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

Category: Family Violence

Standard:

The candidate has a history of resolving family conflict in a nonviolent manner.

Critical Behaviors:

- Any report or complaint (against the candidate) of family violence.
- Any history that a law enforcement unit has been called to the candidate's residence because of his/her behavior.
- Any report or complaint (against the candidate) to protective services for inappropriate treatment of children or adults.
- Any history of protective orders against the candidate.

Recommendation:

- The candidate shall ordinarily have not less than three years without reports as described.
- The presence of any critical behaviors requires an investigation into the facts and circumstances and an appropriate period may be required prior to certification for candidacy or continuance.
- The candidate shall acknowledge his/her behaviors and may have entered into family counseling or other appropriate treatment.



Category: Legal (General)

Standard:

The candidate shall be respectful of the law and evidence legal responsibility in personal habits.

Rationale:

This may not, on the surface, appear to be a behavioral health issue, but similar issues around maturity, discipline, and judgment come into play. In addition, one's approach toward the law often is a barometer of one's respect for authority generally, and unresolved authority issues may significantly hamper clergy effectiveness.

Critical Behaviors:

- More than three moving violations (traffic) within the preceding three years.
- An arrest or conviction for any misdemeanor.
- An arrest or conviction for any felony.
- Note: "Conviction" includes a "no contest" plea without admission of guilt, deferred adjudication and/or probation.

Recommendation:

- Candidates may have no more than three moving violations (traffic) within the preceding three years.
- A history of arrest for any misdemeanor or felony requires investigation of the circumstances of the arrest including review of the offense (police) report. Results of the investigation may require an appropriate period without history of difficulty or further arrest prior to certification for candidacy or continuance.
- A history of conviction for any felony is, under most circumstances, permanently disqualifying.



Category: Legal (Sex-Related Crimes)

Standard:

The candidate shall have no history that poses risk of sexual harassment, sexual assault to adults or children, nor history of any sex-related offense.

Critical Behaviors:

- Treatment for any sex-related crime.
- Arrest, conviction, or written accusation for any sex-related crime.
- Written allegations of any sex-related crime.

Recommendation:

- If the candidate has committed a sex-related crime, he or she should be permanently disqualified.
- Certainly the candidate is entitled to be considered innocent until proven guilty, so a written accusation or arrest alone is not sufficient for disqualification, but either one would raise significant questions which the Board would need to explore in depth.
- The recommendation for permanent disqualification reflects the massive legal exposure an Annual Conference would take on were it to place in ministry a known sex offender. Behind that reality, however, is the awareness that currently available treatments for such offenses are of limited utility, with high rates of recidivism.



Category: Mental Illness

Standard:

The candidate has no current or recurring disqualifying psychological impairment.

Critical Behaviors:

- The candidate has received a diagnosis of bipolar disorder, schizophrenia or any other psychotic disorder.
- The candidate has received a diagnosis of a personality disorder.
- The candidate has been hospitalized for psychiatric treatment.
- The candidate has been prescribed psychiatric medications (including antidepressants and/or anxiolytics).
- The candidate has attempted suicide.

Exploratory Questions:

- Describe the history (sequence) of your treatment for your difficulties.
- What specific potential vulnerabilities do these difficulties create for your ministry, and how do you see yourself protecting both yourself and the people you would serve?
- Would you be willing to authorize communication between those who have treated you and this committee?

Recommendation:

- The more severe the psychiatric impairment, the more important the need for direct consultation with the treating mental health practitioners. The Board may wish to bring in its own mental health consultants in order to evaluate the candidate's situation.
- The candidate has a history of remission from any moderately-to-severely impairing conditions for not less than five years without necessity for psychiatric hospitalization, though treatment may continue.
- The candidate has a history of responsible management of any mildly-to-moderately impairing conditions for not less than five years, and has an effective treatment program in place.



Category: Personal Finances

Standard:

The candidate is not in debt so as to embarrass the church and him or herself.

Rationale:

While this may not, on the surface, seem to be a behavioral health issue, personal financial management has to do with general maturity, including the ability to set priorities, maintain discipline and delay gratification. Difficulties in this area raise concerns about judgment and impulse control.

Critical Behaviors:

- The candidate has been reported to a credit bureau for nonpayment.
- The candidate has a history of a personal bankruptcy.
- The candidate has had money judgments filed against him/her.

Exploratory Questions:

- Describe the history (sequence) of your difficulties.
- Are there extenuating circumstances (possible mitigating circumstances: major medical expenses, divorce)?
- Note: Business failures and unemployment are not necessarily mitigating conditions, but require further exploration.

Recommendation:

- If the candidate has a history of having been reported to the credit bureau, then three years of a good credit history is recommended.
- If the candidate has a history of a personal bankruptcy, then five years of good credit is recommended.
- If the candidate has a history of money judgments, then it is recommended that the judgments be satisfied prior to continuance.



Category: Physical Health

Standard:

The candidate demonstrates no obvious physical health concerns.

Rationale:

Neglect of physical health is known to impair function in pervasive ways. Responsible preventive health care maximizes the functional abilities of the individual and minimizes the health care costs to the annual conference. The physical health concerns listed below may have a strong psychological component, and may reflect psychological disorders.

Critical behaviors (considered in cultural context):

- Obesity (Body Mass Index (BMI) of 30-40 is obese, while a BMI over 40 marks extreme obesity).
- Markedly underweight (BMI is less than 18.5).
- An un-treated, chronic, medical condition such as hypertension, diabetes, etc.
- Non-compliance with prescribed medical treatment for any condition.

Exploratory Questions:

- How do you evaluate your overall physical health?
- What steps do you take to care for your physical health?
- When was your last medical checkup?
- Do you have any current or chronic health problems? If so, what steps are you taking to care for yourself?
- How does your physical health impact your ability to be an effective minister?

Recommendations:

Candidates should be able to articulate their plans for physical health care. Candidates with medical problems should demonstrate medical consultation and cooperation with treatment plans.



Category: Pornography

Standard:

The candidate has no present use/dependence upon pornography.

Rationale:

Dependence upon pornography is known to impair functioning in pervasive ways, including impaired relationships, time lost to sleep and work, and negative self-esteem.

Critical Behaviors:

- A history of being disciplined or dismissed from a job because of accessing pornography.
- A history of regularly visiting pornography sites.
- Downloading pornography from a site.
- Erasing computer history files in an effort to conceal pornography sites.
- Time on pornography sites takes away from or prevents doing other tasks and activities.

Exploratory Questions:

- Are you currently abstinent, and if so for how long?
- If you are abstinent, how and why were you able to become abstinent?
- What are you currently doing to maintain abstinence?
- What is your understanding of how pornography functioned in your life?

Recommendation:

If the candidate is not abstinent, require participation in Sex Addicts Anonymous, Sexual Recovery Anonymous, Sexual Compulsives Anonymous, or similar group.

Recommended Reading:

- *The Porn Trap: The Essential Guide to Overcoming Problems Caused by Pornography* – Wendy and Larry Maltz. Harper Paperbacks, (2008).
- *In the Shadows of the Net: Breaking Free from Compulsive Online Sexual Behavior* – Patrick Carnes, et. Al. Hazelden Publishing, (2007).
- *The Pornography Trap: Setting Pastors and Layperson Free from Sexual Addiction* – Ralph Earle & Mark Laaser. Beacon Hill Press of Kansas City, (2002).
- Christian Century (Sept. 4, 2007), “Addictive Behavior: Pastors and Pornography”.
- Psychotherapy Networker (Dec. 1, 2009), “Out of the Shadow”.

Websites for support:

- www.clergyrecovery.com
- www.helpguide.org
- www.netaddiction.com
- www.healthysex.com



Category: Sexual Misconduct

Standard:

The candidate has no history or complaints of sexual misconduct or charges of sexual harassment having been brought against him/her. See addendum for definitions.

Rationale:

Candidates must model in their personal lives and behavior a healthy and sacred view of sexuality so as not to misuse the clerical office.

Critical Behaviors:

- A history of complaints or charges (either formal or informal) of sexual harassment.
- A history of improper sexual conduct.

Exploratory Questions:

- Have you ever had a complaint or charge (either formal or informal) of sexual harassment or misconduct brought against you? If so, describe the circumstances.
- What steps have you taken to insure that the behavior does not occur in the future?

Recommendation:

- The Board of Ministry should explore in an interview with the committee the steps the candidate has taken to identify and understand and deal with the psychological vulnerabilities that contributed to the behavior, and what safeguards the candidate has put into place to guard against the possibility of similar behavior in the future.
- The candidate should have no evidence of sexual misconduct for a minimum of three years.
- A candidate must articulate a plan to insure that such behavior is unlikely to recur. This plan may include intensive psychotherapy and/or ongoing supervision, or other conditions required by the Board.



ADDENDUM: Definitions of Improper Sexual Conduct

Deviant sexual behaviors:

Deviant sexual behaviors include, but are not limited to, behaviors such as pedophilia, exhibitionism, or other paraphilias, and preoccupation with pornographic materials for sexual stimulation and gratification.

Sexual Harassment:

Includes solicitation, physical advances, or verbal or nonverbal conduct consisting of a single intense or severe act, or of multiple persistent or pervasive acts, by a candidate toward another individual, that are sexual in nature and occur whether in connection with the candidate's clerical activities or personal life, and that are unwelcome, offensive, or create a hostile environment for the affected individual.

Sexual impropriety:

Sexual impropriety is deliberate or repeated comments, gestures, or physical acts of a sexual nature that include but are not limited to:

- Behavior, gestures or expressions which may reasonably be interpreted as inappropriately seductive or sexually demeaning.
- Making inappropriate comments about an individual's body.
- Making sexually demeaning comments to an individual.
- Making comments about an individual's potential sexual performance.
- In a counseling relationship, requesting details of a person's sexual history when not clinically indicated for the type of consultation.
- Requesting a date.
- Initiating conversation regarding the sexual problems, preferences, or fantasies of either party.
- Kissing of a sexual nature.
- Sharing or displaying pornographic material with another person.