

District Committee on Ordained Ministry

HANDBOOK



**North Carolina Conference
The United Methodist Church**

2023-2024 Edition

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NCCUMC Candidacy Checklist

From Inquiring to Certified Candidate

- **Member** of UMC or UM affiliated group (such as campus ministry) for one year
- **Contact your pastor**, or another Deacon or Elder in the UMC. Read and discuss The Christian as Minister with her/him
- **Submit letter by email to Office of Clergy Life (to Rev. Beth Hood)**, indicating that you have read The Christian as Minister, request entrance into candidacy process and include written statement of call. The Office of Clergy Life will share this information with your DS, and together will determine if you are ready to move forward in the process. The Office of Clergy Life will contact you with next steps.
- **Complete and return** the following forms to The Office of Clergy Life:
 - Candidacy Retreat application
 - **Candidacy Fees**: Along with these documents, you will need to submit a check in the amount of \$75. This amount covers the \$75 Candidacy Retreat Fee, and your UMCARES registration. Checks should be made payable to “Office of Clergy Life” with “Candidacy Retreat” in the memo line.
- After receiving the completed forms, the OCL will enroll you in the United Methodist Candidate and Record Entry System (UMCARES):
 - You will receive an email inviting you to log in at: <https://www.umcares.org>
 - Complete Candidacy Application Form (Form 101)
 - Guidebook Request
- Prior to the Candidacy Retreat, **read and review** pages 1-46 of the Candidacy Guidebook.
- **Attend** the next Candidacy Retreat (offered bi-yearly in July and January). While at the retreat, complete:
 - Two Sessions with Mentoring Group
- After the Retreat:
 - If you are wishing to continue the process you will need to submit \$75 for the Background Check fee, and \$150 toward your Psychological Evaluation (this covers only a portion of the cost. The rest is covered by the NC Conference). Checks should be made payable to the “Office of Clergy Life” with “Candidacy Fees” in the memo line.
 - **Meet with your mentoring group** to complete three additional mentoring sessions
 - **Meet one-on-one with Conference psychologist** to review psychological evaluation
 - **Complete** the following paperwork:
 - Background Check Form
 - Background Check Authorization Form
 - Disclosure Form (must be notarized)
 - Credit Score
 - Digital Photo
 - Medical form
 - Psychological Test
 - Form 102- Biographical Form
 - **Appear before Staff-Parish Relations Committee** at your church. If approved:
 - **Appear before Charge Conference** at your church. If approved: Submit Form 104 to Office of Clergy Life.
 - **Appear before the District Committee of Ordained Ministry (dCOM)**, seeking status as Certified Candidate.
 - Complete questions from Book of Discipline, paragraph 310.2a. Responses should be 3- 5 pages

Three Tracks to Conference Membership

(Book of Discipline, Par. 324)

Course of Study Track

¶324.6 – Local Pastors

- High School Education
- Bachelor's Degree
- Basic Course of Study (5 year)
- Advanced Course of Study (32 hours)
- Provisional Period (minimum 2 years full time)
- Full Membership and Ordination as Elder

Professional Certification Track

¶324.5 - Deacons only

- High School Education
- Must be 35 years of age at time of certified candidacy
- Bachelor's Degree
- Professional Certification (10 semester hours)
- Basic graduate theological studies (24 semester hours)
- Provisional Period (minimum 2 years full time)
- Full Membership and Ordination as Deacon

Seminary Track:

¶324.4

- High School Education
- Bachelor's Degree
- M.Div. Degree for elder or deacon track
- OR for deacon track, other graduate theological degree/or graduate degree and basic graduate theological studies (24 semester hours)
- Provisional Period (minimum 2 years full time)
- Full Membership and Ordination as Elder or Deacon

EDUCATIONAL REQUIREMENTS FOR PROVISIONAL MEMBERSHIP

The *Discipline* lists the following specific course requirements that must be included in graduate theological education prior to provisional membership in The United Methodist Church (see ¶ 324.4a):

- Old Testament
- New Testament
- Theology
- Church History
- Mission of the Church in the world
- Worship/liturgy- Must include the theory and practice of planning and leading public worship
- Evangelism
- A minimum of two semester or three-quarter hours in each of the fields of United Methodist history, doctrine, and polity
- For candidates on the elder track, a course in preaching is required by The North Carolina Conference
- Candidates must take one course to satisfy the evangelism requirement and another course to satisfy the mission of the church requirement

In addition to the above requirements, The North Carolina Conference allows candidates on the deacon track to select a class on Teaching or a class on Preaching.

In the NC Conference prior to writing papers and interviewing with the Conference Board of Ordained Ministry, all candidates seeking provisional status must have completed all of the required core courses above by December 31st of the year and be graduating seminary in May before Annual Conference.

Ministerial
Education Fund
Eligibility
North Carolina
Conference

1. Aid may be granted to students during their junior and senior years in undergraduate school, and in each of their seminary years while working on the basic degree for ordination.
2. Applicants must be **Certified Candidates**, having been approved by their local S/PPRC, their charge conference and the district committee on ordained ministry.
3. Students must be enrolled as “full-time” students. Full-time means twelve (12) hours minimum in undergraduate school, and nine (9) hours minimum in seminary per semester. Exceptions related to certified medical disabilities will be considered
4. Students must attend a University Senate approved school. A list of these schools can be found here:

<https://www.gbhem.org/education/university-senate/list-approved-schools>
5. Students must maintain an overall “C” average throughout their academic career. Students must submit a transcript to the Office of Clergy Life following each semester.
6. Students must be intending to serve in the North Carolina Annual Conference or within the UMC connection for at least five years.
7. Aid may *not* be extended to graduate students in Ph.D., D. Min., Th. M. or other degrees beyond the basic degree.

All Certified Candidates who meet the above requirements will receive at least \$1,000 dollars per year. Additional scholarships will be determined by the NC Conference Scholarship Team, which will meet in May to determine scholarship amounts. Recipients will need to complete the MEF application each year in order to receive funding. Applications are submitted annually through GBHEM from January- March.

BASIC FIVE YEAR COURSE OF STUDY

(required for Licensed Local Pastors who have not attended seminary. Full-Time Local Pastors have 8 years to complete the basic COS, Part-Time Local Pastors have 12 years. Failure to adhere to those timelines may jeopardize one's appointment.)

THE CURRICULUM

The Course of Study proposes to prepare faithful and effective pastoral leaders for the church. Such leadership is never developed in the abstract but rather in context. The Course of Study curriculum is designed to provide classroom learning that can then be used to deepen and strengthen the pastoral leader's ministry. Course descriptions can be found on the Duke Divinity Course of Study website, as well as that of the General Board of Higher Education and Ministry. Access to booklists and pre-class assignments for each course will be made available online. Again, students should read their textbooks and complete all assigned pre-class work prior to coming to the first session of class.

FIRST YEAR COURSES

- COS 121: Bible I—Introduction
- COS 122: Theological Heritage I—Introduction
- COS 123: Formation and Discipleship
- COS 124: Transformative Leadership

SECOND YEAR COURSES

- COS 221: Bible II—Torah and Israel's History
- COS 222: Theological Heritage II—Early Church
- COS 223: Worship and Sacraments
- COS 224: Administration and Polity

THIRD YEAR COURSES

- COS 321: Bible III-- Gospels
- COS 322: Theological Heritage III—Medieval and Reformation
- COS 323: Congregational Care
- COS 324: Preaching

FOURTH YEAR COURSES

- COS 421: Bible IV—Prophets and Wisdom Literature
- COS 422: Theological Heritage IV--Wesleyan Movement
- COS 423: Mission
- COS 424: Ethics

FIFTH YEAR COURSES

- COS 521: Bible V—Acts, Epistles, and Revelation
- COS 522: Contemporary Theology
- COS 523: Evangelism
- COS 524: Theology of Ministry

ADVANCED COURSES

Each year advanced courses are offered in areas that are pertinent to the pastor's role and responsibility in the local church. Students pursuing Advanced Studies as a route to ordination should choose classes based on individual annual conference requirements. NC Conference Educational Requirements may be found on the OMR website.

Section 2: The DCOM and Your Role

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

The district committee has responsibility for supervising “all matters dealing with candidacy for the ordained ministry and with the license for local pastor.” (§666.5)

Membership

The following shall be represented in the membership of the district committee:
(§666.1)

- the district superintendent
- a representative from the BOM, who may be named chairperson
- at least six other clergy in the district including:
 - women and ethnic clergy
 - an associate member
 - may include one local pastor who has completed the Course of Study
 - Elders and deacons
 - whenever possible at least one deacon or elder shall be age 35 or younger
- at least three professing lay members shall be of the committee
- interim vacancies may be filled by the district superintendent
- Clergy and lay members shall be nominated annually by the district superintendent in consultation with the chairperson or executive committee of the board of ordained ministry and approved by the annual conference.
 - Members shall be well versed in missional priorities of the Annual Conference including effective leaders, healthy congregations, congregations for children, anti-racism and unity.

Organization

- The organization of the dCOM must ensure a close working relationship with the conference BOM and other district committees within the annual conference.
- The Book of Discipline does not prescribe a specific structure, though all responsibilities and functions must be fulfilled. In NC, each dCOM must elect a **Chair, Vice-Chair and Registrar**.
- The dCOM shall elect its officers at the first meeting following the annual conference session when the members were elected. (§666.2)
- The dCOM may appoint or elect officers listed below and others, such as an enlistment officer or a continuing education officer or a secretary, taking care to assign duties and responsibilities as described below.
- Immediately following the election, a list of dCOM officers should be sent to the registrar of the Office of Clergy Life and the District Office.

Officers

Chairperson: This office may be held by the BOM representative. (§666.1)

The duties are:

- to ensure the members of the committee are properly trained
- in consultation with the Office of Clergy Life to call regular meetings of the dCOM, informing each member of the time, place, and agenda
- to preside over meetings —it is the chairperson's responsibility to make sure the committee understands the scope of its duties and fulfills them with care
- to maintain a close liaison with the BOM, especially with the candidacy registrar, the BOM registrar, and
- other officers or committee chairpersons who must regularly share information from the dCOM
- to work with other chairpersons of district committees in the conference to ensure consistent use of
- procedure

Vice- Chairperson: In the absence of the chairperson, the Vice-Chairperson is asked to preside over meetings.

Registrar: The dCOM should elect a person other than the district superintendent or the chair of the dCOM to act as registrar for the committee.

- to ensure that all team members have access to the candidates' online files
- to fill out and submit to the Office of Clergy Life a digital action report for each candidate after she/he meets with the dCOM.
- to keep all persons interviewed by the district committee informed about decisions and recommendations as soon as possible in writing. The dCOM is responsible for writing letters to the candidates.

BOM representative: The dCOM chairperson nominates the BOM representative who must be someone already serving on the BOM.

Record Keeping: The Office of Clergy Life will maintain a service record and file on every local pastor and candidate for ordained ministry. A copy of these files will be shared electronically with members of the dCOM via Google Drive. Any files downloaded are to be deleted immediately following interviews.

Functions of the Committee

Enlistment

- Encourage persons to enter the candidacy program.
- Aid the local church and other agencies of the conference in the process of enlisting persons for ordained ministry
 - “In special circumstances, the district committee may authorize other United Methodist 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, pastor parish relations committee and charge conference.” (§310.3)

Interviewing

- Interviewing is one of the most basic personnel functions used by the church and is at the heart of the work of the dCOM. The dCOM conducts interviews for a number of different purposes.

Candidacy Certification

- Candidates seeking to become certified request to meet with the district committee.
- District committee address with the candidates their statement of call and the written responses to the questions in §310.2a:

- o the most formative experience of their Christian life
- o God's call to licensed or ordained ministry and role of the church in their call
- o Their beliefs as a Christian
- o Their gifts for ministry
- o their present understanding of their call to ministry as elder, deacon, or licensed ministry; and their support system
- Examine and approve qualified applicants for certification and annual renewal as certified candidates toward election as probationary (provisional) members. (§§310, 666.9)
- Inform the BOM candidacy registrar, Becki Leeland, of the names and addresses of all who are issued certificates of candidacy (§666.3) via the digital action report.
- Recognize and approve the service setting for certified candidates working toward provisional membership (§324.2)
- Maintain ongoing communication with all candidates:
 - o Counsel them regarding pre-theological studies (§666.5)
 - o In consultation with the Office of Clergy Life, the dCOM will inform candidates about scholarships and loans for education
 - o Review academic progress (receive transcripts and reports from college/seminary) (§313.2)

Continuation of Certified Candidacy

The progress of candidates is reviewed, and certification renewed annually by the dCOM or equivalent body as specified by the district committee following an interview with the candidate and the meeting of the following conditions:

- The candidate has received the recommendation for renewal by their charge conference or equivalent body as specified by the dCOM (§§313.1, 666.9) This action takes place at Charge Conference and is recorded in the minutes
 - When requested, the candidate has presented an official transcript from the school the person is attending and demonstrates satisfactory progress in his or her studies and. (§313.2)
 - The committee has reviewed the candidate's gifts, graces, and fruits for the work of ministry. (§§313, 666.9)
 - If a candidacy has lapsed; it may be reinstated at the discretion of the dCOM (§314.2)
- Please contact the Office of Clergy Life for concerns with contacting candidates.

Local Pastor's License

- Examine qualified applicants for licensing as local pastors (§315, §666.8)
- Help applicants enroll in licensing school by contacting the Office of Clergy Life.
- Recommend to the BOM the issuance of a license to all applicants who have satisfactorily completed the requirements (§315), including candidacy.
- Send the names and addresses of all persons approved for licensing as local pastors to the Office of Clergy Life (ClergyLife@nccumc.org).
- Refer local pastors to the appropriate BOM registrar, Becki Leeland, for enrollment in the Course of Study, and receive reports on their progress through the district superintendent
- Recommend to the BOM persons who qualify for continuance as local pastors (§§319.2, 666.9)
- Communicate to the BOM registrar, Becki Leeland, the circumstances of any discontinuance of a local pastor (§320.1)
- Recommend to the BOM those persons who qualify for restoration of credentials as a local pastor (§§320.4, 666.9)
- Oversee a process of supervision of personal and professional growth for local pastors

Clergy Mentoring for Local Pastors

- Each local pastor who has not completed Basic Course of Study must be in a clergy mentoring group or a mentoring relationship. These mentors will be recommended by the District Superintendent and be trained and assigned by the Office of Clergy Life.

- The mentor will make an annual report both to the dCOM and to the BOM, to confirm the participation of the local pastor.
 - Remember that conversations between mentor and mentee are confidential and information may be released only with written permission and signed by both local pastor and mentor.
 - The report will be kept in the local pastor's file
- Mentors are an integral part of the educational program of local pastors, both formal and informal education:
 - They assist local pastors in reflection of their experiences in ministry to help them learn from those experiences.
 - They monitor preparation of material for Course of Study classes.
 - They help local pastors integrate into their practice of ministry theology and theory they have learned.
- The DCOM is responsible for ensuring local pastors are faithfully participating in mentoring.

Certified Lay Ministers

- ② When a pastoral charge is not able to be served by an ordained or licensed clergy, the Bishop, upon recommendation of the Cabinet, may assign a qualified and trained lay person, lay minister or lay missionary to do the work of ministry in that charge...The lay person assigned is accountable to the policies and procedures of the annual conference where assigned. (§205.4)
- ② In order to enhance the quality of ministry to small membership churches, expand team ministry in churches and in deference to an expression of gifts and evidence of God's grace associated with the lay ministry of early Methodism, the certified lay minister is to be recognized and utilized. (§268)
- ② The certified lay minister shall preach the Word, provide a care ministry to the congregation, assist in program leadership, and be a witness in the community for the growth, missional and connectional thrust of The United Methodist Church as part of a ministry team with the supervision and support of a clergy person. (§268.1)
- ② A certified lay speaker or a person with equivalent training as defined by his/her district or conference may be certified as a lay minister by the district committee on ordained ministry after he/she has completed the following. (§268.3)
 - A)** been recommended by the pastor of the local church where he/she holds membership and by vote of the Church Council or Charge Conference
 - B)** completed courses relevant to his/her assignment including preaching and exegesis
 - the care of the congregation
 - other courses as recommended by the General Board of Discipleship and General Board of Higher Education and Ministry in consultation with leaders in the annual conference, and other appropriate Agencies and organizations
 - C)** demonstrated appreciation of the history, polity, doctrine, worship and liturgy of The United Methodist Church through service in his/her local church
 - D)** been recommended by the district superintendent after completion of appropriate screening
 - E)** made application in writing to the district committee on ordained ministry
 - F)** appeared before the district committee for review and approval
- The certified lay minister is to apply in writing, to the District Superintendent, for recertification biennially to the district committee on ordained ministry after:
 - ministry review by Church Council or Charge Conference from the congregation of which he/she is a member
 - satisfactory completion of an approved continuing education event
 - recommendation of the district superintendent (§268.4d)

- The certified lay minister under assignment is to appear biennially before the district committee on ordained ministry for re-certification after:
 - ministry review by Church Council or Charge Conference where assigned
 - a satisfactory completion of an approved continuing education event
 - recommendation of the district superintendent (§268.4d, §419.2, §205.4)
- Transfer of Certification by Certified Lay Ministers

A certified lay minister who moves may transfer certification to the new district upon receipt of a letter from the previous district's dCOM confirming current certification. (§268.5)

- The certified lay minister is a lay person and as such is not eligible for support by equitable compensation funds or pension which are provided for clergy members. (§268.6)
- The district committee shall report annually to the annual conference through the annual conference board of ordained ministry a roster of all persons certified as lay ministers. (§666.11)

Associate Members

- Recommend to the BOM persons who qualify for associate membership. Each candidate must be recommended in writing on the basis of a three-fourth majority vote of the dCOM. (See §321, §322, and §666.9)

Provisional Membership

- Recommend to the BOM those persons who qualify for provisional membership. Each candidate must be recommended in writing on the basis of a three-fourth majority vote of the dCOM. (§666.8, §324.10)
- Recommend to the BOM and cabinet readmission to provisional membership those persons who have been discontinued and have requested readmission (§666.8, §364).

Readmission to Conference Membership

- Recommend to the BOM and cabinet persons requesting readmission from honorable location, administrative location, or who have previously exited their ministerial office (§666.8, §365, §366).

SUMMARY: ROLE OF THE DCOM

Enlistment

- **Recruitment among local church settings**
- **Recommending potential candidates to the Conference**

Interviews

- **Candidacy Certification: Fitness for Ministry**
 - Spiritual fitness
 - Psychological fitness
 - Physical fitness
 - Potential for effectiveness
- **Interviews are required at these points:**
 - Certification Interview following completion of all steps for certification
 - Annual renewal of certified candidacy
- **Licensed Local Pastor: Annual License for Pastoral Ministry**
 - Fitness issues
 - Readiness issues
 - Recommendation for licensing and conference relationship (student, part-time, full-time)
 - Annual renewal of the license for pastor ministry
- **Associate Membership: Effectiveness in Ministry**
 - Assess areas of developing competency
 - Review academic background
 - Consider current practice of ministry
 - How has theological understanding evolved since licensing?
- **Provisional Membership: Readiness for Ministry**
 - Assess areas of developing competency
 - Review academic background
 - Consider field education experiences, internships, other practice of ministry experiences
 - How has theological understanding evolved since certification?
- **Readmission to Conference Membership**
 - Be in touch immediately upon such a request with the Office of Clergy Life prior to any of these interviews.
 - From honorable location
 - From administrative location
 - From those who previously withdrew from the ministerial office.
- **Certified Lay Minister**
 - Assists the pastor in congregational care and program development in the local church
 - Works as part of a ministry team with supervision by a clergyperson.
 - Biannual recertification required.

One Year in the Life of a District Committee on Ordained Ministry

August – Elect Officers & Interviews

Elect officers – Chair, Vice-Chair, Registrar

Review important dates and set schedule for year

Discuss recruiting/enlistment strategies

Interviews

- Candidates for first-time certification
- Certified Candidates seeking to be recommended to the Board of Ordained Ministry for provisional membership. Such recommendations do not carry over year to year. If someone was previously delayed by the Board, they must be recommended once again by a district committee on ordained ministry.

January/February – Certification, Local Pastor Continuance

Interviews

- Candidates appearing for first-time certification
- Certification renewal and recommendation to attend Licensing School (particularly for those candidates who plan to attend Licensing school in May and receive an appointment)
- Continuance of License for Local Pastors
- Other interviews as needed (CLM's, certified candidates transferring from other annual conferences, etc.)

March – Local Pastor Continuance

- Continuance of License for Local Pastors
- Continuation Interviews for Certified Candidates who are planning to attend licensing school in May

April/May Interviews

- First time Certification interviews for candidates (as well as recommendation for licensing in some cases)
- Continuation interviews for Licensed Local Pastors (as necessary)
- Individuals seeing first time certification as a Certified Lay Minister

November Interviews

- CLM Renewal Interviews ONLY

IMPORTANT NOTES FOR THE DCOM

- Some people are better utilized as lay persons. By virtue of our baptisms, all people are called to ministry, but not all people are called to serve as licensed/ordained ministers. The dCOM should carefully assess whether or not they believe candidates have the gifts and evidence of fruit necessary for licensed/ordained ministry or if they are better suited to serve the church as a lay person.
- Paperwork required by the conference and the *Book of Discipline* needs to be in place before candidates are certified. *No candidate should be certified "contingent upon" anything.* The Office of Clergy Life will provide the necessary paperwork to DCOM members (ideally 30 days prior to the scheduled interviews).
- All candidates must have a credit score report in their district file in compliance with the 2007 amendment to Annual Conference. If that score is 650 or below, the candidate is required to narrate the reasons for the score, present a plan to address the issue, and/or document evidence that their finances are more stable. Candidates may update their credit score report with the Office of Clergy Life at any time. Financial health is one of several considerations a dCOM should make when deliberating one's readiness for ministry.
- All candidates should be made aware of their connection to the Office of Clergy Life and to respond accordingly.
- Candidates need to update their contact information with the Office of Clergy Life as it changes.
- When the DCOM approves and recommends a candidate for licensed ministry, the candidates should be made aware of the requirement to attend *licensing school*. Dates each year can be obtained from the Office of Clergy Life.
- Convey to candidates that MEF grants are only for candidates who intend to serve at least five years in the UMC. Certified candidates (who have received approval from SPRC/PPRC , Charge Conference and dCOM) are eligible to receive these funds.
- All Local Pastors (who have not completed seminary or Course of Study) are required to have a clergy mentor in accordance with the *Book of Discipline* ¶1316.4.

dCOM INTERVIEW GUIDELINES

Guidelines for preparing for an interview

- Allow thirty minutes prior to interviews to review the files, the written documents, the psychological assessments of the candidates for that day. If you will be breaking into groups, this time can be spent in your smaller groups instead of as an entire committee. Discuss concerns and issues that need to be addressed in the interviews.
- Decide on the most important questions and who will ask each question (do not have the chair or only one person ask all the questions).
- Decide on the size of the interview group. DCOM can subdivide, into groups no less than 6, for most interviews and then report back a recommendation to total committee for final decision.
- Refer to the dCOM Handbook to make sure all items are in the file prior to the interview.
- Decide how long the interview will be
- One hour for 1st time certification and recommendation to the Board of Ordained Ministry (45 minutes for interview, 15 for discussion afterward)
 - 30 minutes for continuation of local pastors and certified candidates
 - If a local pastor has completed basic course of study or has an MDiv, they may be interviewed in a group setting with other local pastors who have met the same requirements. Both the pastor and the dCOM have the right to request an individual meeting with the dCOM for the yearly interview.

Role of the Chair

- Make sure that prior to scheduling an interview, the necessary papers have been submitted and the psychological assessment is in the file. *Review the psych report and suggested questions on the report.*
- Welcome the candidate (and mentor if applicable) to the interview. If present, ask mentor to briefly introduce the candidate. State the purpose of the interview (Introductory Interview, Certification Interview, for recommendation for provisional or associate membership, etc.)
- Ask members of the DCOM to introduce themselves.
- Ask someone to begin with a prayer.
- State the time available for the interview and be the time-keeper.
- The chair may want to ask the first question. A possible first question might be: "Tell us about yourself, your sense of call, and where God is leading you."
- Be careful to involve the members of your committee in asking the questions. After the first question, the chair should focus on process and time-keeping rather than asking questions.
- Ask someone to close with prayer.

Things to remember

- Create hospitable space! Be aware of room temperature, how the room is arranged, the way questions are posed, and what sort of non-verbal cues are conveyed.
- Decide how to begin the interview. Do not begin with the psychological assessment.
- Remember that the mentor may not speak in the interview.
- The candidate does most of the talking.
- Do not allow other committee members to answer questions or to engage in an argument or discussion with the candidate.
- This is not a therapy session.
- Recommendations should be determined by the whole committee after the interview, rather than individual committee members offering advice during the interview and must be put in writing.

- Decide how the decision of the DCOM will be communicated: having the candidate wait in the hall vs. a phone call and/or letter following the DCOM meeting.
- Evaluate the interview. What was effective in the interview? What would we do differently next time?
- Were any questions asked that were inappropriate?
- Remember the distinction between candidates on the elder and the deacon track. Ask appropriate questions.

Interview for: Candidacy Certification for Ordained or Licensed Ministry

Requirements prior to interview

1. Call Statement
2. Credit Score Report (not to be confused with the consumer credit report) must be on file with dCOM and Clergy Life candidates with a score of 650 or below should be delayed until the mentor can confirm there has been some progress made stabilizing the candidate's financial status.
3. HireRight Expanded Background Check on file
4. Form 103 Medical Report completed in file
5. Candidate's Disclosure Form (notarized)
6. Form 104 in file, indicating recommendation by the candidate's home church charge conference
7. Graduation from an accredited high school or certificate of equivalency
8. Member of the United Methodist Church for one year (prior to exploring candidacy) and have served in leadership in the church
9. Written report from mentors indicating completion of the six mentoring sessions
10. Written response to statements in ¶310.2a
11. Psychological Assessment report completed.
12. Form 102- Biographical Form
13. Digital Photo

No candidate shall be certified "contingent upon" completion of any requirement!

Suggested Questions

- ☐ Tell us about your journey, your call to ministry.
- ☐ Share several highlights of your ministry this year.
- ☐ Tell us about your leadership experiences as a student.
- ☐ What were some of your frustrations in ministry this year?
- ☐ What are your plans for the future, ...personally, ...for the church?
- ☐ Share about your devotional life. How are you growing spiritually?
- ☐ Tell us about your personal strengths...your areas of growth.
- ☐ What are you doing to avoid burnout?
- ☐ What are your goals for the year ahead?
- ☐ Questions about theology and sacraments prior to certification.
- ☐ What have you read that has been helpful in your spiritual life?
- ☐ What 2-3 characters in the Bible emulate your own spiritual life/journey?
- ☐ What did you learn about yourself in the psychological assessment process?
- ☐ Talk about your family.
- ☐ Talk about positive and negative relationships in your life.
- ☐ What are the most stressful aspects of ministry for you?
- ☐ Share a conflict situation in which you have been involved and how you dealt with it.
- ☐ Share a leadership experience you have had this year.
- ☐ Tell us about your seminary classes (for students).

Action Required

Individual **written ballot**, three-fourths majority required to certify.

Criteria: Spiritual fitness; Psychological fitness; Physical fitness; Potential for effectiveness

Interview for: Licensing for Pastoral Ministry (Local Pastor) – i.e. recommending to attend Licensing School

Requirements prior to interview

1. Certification as a candidate for ministry (see requirements for Candidacy Certification). Note that this recommendation may take place in the same interview as for Candidacy Certification but that action comes first.

Suggested Questions

- ☐ Tell us about your journey, your call to ministry.
- ☐ Share several highlights of your ministry this year.
- ☐ Tell us about your leadership experiences as a student.
- ☐ What were some of your frustrations in ministry this year?
- ☐ What are your plans for the future, ...personally, ...for the church?
- ☐ Share about your devotional life. How are you growing spiritually?
- ☐ Tell us about your personal strengths...your areas of growth.
- ☐ What are you doing to avoid burnout?
- ☐ What are your goals for the year ahead?
- ☐ Questions about theology and sacraments prior to certification.
- ☐ What have you read that has been helpful in your spiritual life?
- ☐ What 2-3 characters in the Bible emulate your own spiritual life/journey?
- ☐ What did you learn about yourself in the psychological assessment process?
- ☐ Talk about your family.
- ☐ Talk about positive and negative relationships in your life.
- ☐ What are the most stressful aspects of ministry for you?
- ☐ What do you do to take care of yourself physically?
- ☐ Share a conflict situation in which you have been involved and how you dealt with it.
- ☐ Share a leadership experience you have had this year.
- ☐ Tell us about your seminary classes (for students).

Action Required

Three-fourths vote with recommendation required to specify full time local pastor, part time local pastor, or student local pastor (note that “student local pastor” is for only those students from other annual conference not in the candidacy studies in NC).

Criteria: Spiritual fitness; Psychological fitness; Physical fitness; Readiness for Ministry; Potential for effectiveness

Also note that the vote here is pending completion of Licensing School.

Interview for: Renewal of Certified Candidacy (annually)

Requirements prior to interview

Note: The district committee must let the candidate know what is required. The candidate has the responsibility for requesting these reports be sent to the district committee/submitted to the Office of Clergy Life.

1. Annual recommendation of the candidate's home church charge conference in Online Data Collection
2. An official transcript from the school, college, or seminary (if applicable)
3. If the candidate is in a field education program in seminary, a copy of the field education report (called by various titles at different schools) or a written report from the supervisor in that setting

Suggested Questions

- ☐ Tell us about your journey, your call to ministry.
- ☐ Share several highlights of your ministry this year.
- ☐ Tell us about your leadership experiences as a student.
- ☐ What were some of your frustrations in ministry this year?
- ☐ What are your plans for the future, ...personally, ...for the church?
- ☐ Share about your devotional life. How are you growing spiritually?
- ☐ Tell us about your personal strengths...your areas of growth.
- ☐ What are you doing to avoid burnout?
- ☐ What are your goals for the year ahead?
- ☐ Questions about theology and sacraments prior to certification.
- ☐ What have you read that has been helpful in your spiritual life?
- ☐ What 2-3 characters in the Bible emulate your own spiritual life/journey?
- ☐ What did you learn about yourself in the psychological assessment process?
- ☐ Talk about your family.
- ☐ Talk about positive and negative relationships in your life.
- ☐ What are the most stressful aspects of ministry for you?
- ☐ What do you do to take care of yourself physically?
- ☐ Share a conflict situation in which you have been involved and how you dealt with it.
- ☐ Share a leadership experience you have had this year.
- ☐ Tell us about your seminary classes (for students).

Action Required

Majority vote, not written ballot.

Interview & Guidelines for: Accepting Certified Candidates from another Annual Conference

¶313.4, *The Discipline* states that “a person who is a certified candidate or who is in the candidacy process may have her or his status or studies accepted by another district committee in the same or another annual conference.

1. The candidate requests that his/her file be sent to the Office of Clergy Life, 700 Waterfield Ridge Place, Garner, NC 27529 or clergyliife@nccumc.org.
2. The file must include all of the items required by the North Carolina Conference for certification as a candidate, listed as follows:
 - ☐ validation of enrollment in candidacy studies
 - ☐ expanded background check
 - ☐ medical report
 - ☐ candidate’s notarized disclosure form
 - ☐ record of the Charge Conference approval
 - ☐ the psychological assessment
 - ☐ the written responses to questions from ¶310.2
 - ☐ mentor report
 - ☐ recommendation from the former district Committee on Ordained Ministry
 - ☐ annual renewal of candidacy, if applicable.

For a **licensed local pastor**, all preceding items plus

- ☐ documentation of licensing (copy of the license)
 - ☐ annual renewal of the license for pastoral ministry
 - ☐ transcripts showing progress in the course of study
 - ☐ transcripts of undergraduate education if applicable
 - ☐ recommendation from the current district superintendent.
3. The district Committee on Ordained Ministry reviews the candidate’s file.
 4. An interview is required prior to acceptance of candidacy.
 5. If the candidate is certified and is requesting local pastor status, the district Committee makes a recommendation regarding licensing by The North Carolina Conference. Licensing is dependent upon the person receiving an appointment in The North Carolina Conference.
 6. The action is reported to the Director of Clergy Life for approval by the Board.

Interview for: Local Pastor Continuance (annually)

Requirements prior to interview

Note: The district committee must let the local pastor know what is required. The local pastor has the responsibility for requesting these reports be sent to the district committee/submitted to the Office of Clergy Life.

1. Evidence of satisfactory progress in the required studies:
 - a) Local pastors preparing for provisional membership shall complete the Local Pastors' Licensing School and then present annually to the district committee on ordained ministry an official transcript from college, seminary, or Course of Study.
 - b) All other local pastors shall complete the Local Pastors' Licensing School and present annually until completion an official transcript from the five-year Course of Study (must be completed within eight years for Full Time Local Pastors and in twelve years for Part-time Local pastors, see ¶1319.3). Part-time local pastors must complete two courses of COS annually, ¶1318.2.
2. Annual written report of the clergy mentor.
3. Recommendation of the district superintendent.

Suggested Questions

- Share your vision for your church/charge.
- Focus on the candidate's areas of strength and areas for growth rather than spending a lot of time on what is going on or not going on in their church. Be careful to not spend the time evaluating the church/charge but keep the focus on the local pastor and his/her role.
- What/where are your support systems?
- Did you establish any goals or objectives for personal or professional growth last year (in consultation with your mentor)? What were they? What did you do toward accomplishing these goals and how well did it work?
- What were your points of growth over the past year?
- How do you equip laity in your church? Share some specific examples.
- What are your plans for the future? Continuing education plans? Plans for ordination?
- What was your Course of Study focus last year? Did you find it helpful/useful? What changes or improvements to your practice of ministry can you identify as a result of the Course of Study?
- In what ways have you grown the most in the past year, both personally and as a pastor? What do you feel were the causes of this growth?
- Were you assigned a clergy mentor to work with you during the past year? If so, describe the relationship and what you worked on with your mentor. If not, is there someone you look upon as your mentor? Was this a helpful relationship? If not, why not? Can this committee be of any help in providing a more helpful mentor relationship?
- What was the most difficult challenge you faced as pastor this past year and how did you meet it?
- What did you learn from it? How do you feel you have grown as a result of it?
- Talk about your pastoral appointment? Has it been what you expected when you felt called to become a local pastor? In what ways have you been surprised? In what ways have you been affirmed that you are properly responding to God's call in your life?
- What is the single most important thing you need at this point in time to become a better pastor?
- What is the greatest joy you experienced in the past year? Why do you feel this was so?
- How do you integrate your personal and professional responsibilities? Do you experience tensions between family and church expectations of you?

Action Required

Majority vote of the committee, specifying annually full time, part time or student local pastor.

Interview for: Recommendation for Provisional Membership (RBOM i.e. recommending to the Board of Ordained Ministry)

Requirements prior to interview

1. Annual renewal of certified candidacy or license for pastoral ministry
2. Certified candidate or licensed local pastor for at least one year
3. Service requirement – demonstrated gifts for ministries of service and leadership to the satisfaction of the dCOM
4. Met the educational requirements of the NC Conference Board of Ordained Ministry (outlined as educational requirements in ¶324) which include an undergraduate degree
5. Or for those applying under ¶324.6 and completed the 5 year Course of Study, and 32 semester hours of graduate theological study and met the educational requirements of the NC Conference Board of Ordained Ministry
6. If this is also the interview for candidacy renewal or local pastor continuance, see the requirements on those pages.
7. Submit a 5 page essay to the dCOM for consideration of readiness to interview with the BOM. Questions can be found on the OCL website.
8. An up to date and complete file with the Office of Clergy Life. Psychological evaluation, background check and credit score are updated every 48 months and medical is updated annually

Suggested Questions

- ☐ All of us are called by God. Share about your specific call to ordained ministry?
- ☐ Questions that would integrate their theology with their practice of ministry.
- ☐ At this point, the Board is looking for **readiness for ministry**. Readiness will be evaluated in four areas: call, theology, personal growth and development, and practice of ministry.
- ☐ Questions that make the connection between their seminary/Course of Study education and their practice of ministry.
- ☐ How has your theology changed since you have been in seminary/Course of Study?
- ☐ Where/what are your support systems?
- ☐ What did you learn about yourself and about ministry through the CPE experience (if elected and completed)?

Action Required

Written ballot with three-fourths majority vote.

Criteria: Areas of developing competencies; Academic background; Consider field education experiences, internships, other practice of ministry experiences; Review how theological understanding has evolved since certification; Review carefully educational requirements. Contact the Office of Clergy Life with any questions.

Interview for: Recommendation for Associate Membership (¶322, 2016 Discipline)

Requirements prior to interview

1. Annual renewal of license for pastoral ministry with service as a full time local pastor for four years (or equivalent if approved by the Conference Board of Ordained Ministry).
2. Reached the age of 40.
3. Completed the five year Course of Study (with no more than one-half year by correspondence or online/distance learning courses).
4. Completed a minimum of sixty semester hours toward the Bachelor of Arts or equivalent degree in an accredited college or university.
5. Declared their willingness to accept continuing full-time appointment.
6. If this is also the interview for local pastor continuance, see the requirements on that page.

Suggested Questions

- ☐ All of us are called by God. Share about your specific call to associate membership?
- ☐ Why are you seeking associate membership?
- ☐ Questions that would integrate their theology with their practice of ministry.
- ☐ For associate membership, the Board is looking for **effectiveness in ministry**. Effectiveness will be evaluated in four areas: call, theology, personal growth and development, and practice of ministry.
- ☐ Questions that make the connection between their Course of Study education and their practice of ministry.
- ☐ How has your theology changed since you have been in the Course of Study?
- ☐ Where/what are your support systems?
- ☐ What did you learn about yourself and about ministry through the CPE experience (if elected and completed)?

Action Required

Three-fourths vote, recorded on the NC Conference Form, with a written narrative by the chair of the dCOM attached to the form describing the candidate's areas of strength and areas of growth submitted directly to the Office of Clergy Life.

Criteria:

- ☐ Areas of competencies
- ☐ Academic background
- ☐ Consider current practice of ministry
- ☐ Review how theological understanding has evolved since licensing
- ☐ Effectiveness will be evaluated in four areas: call, theology, personal growth and development, and practice of ministry.

Interview for: Certified Lay Minister

Description: In order to enhance the quality of ministry to small membership churches, expand team ministry in churches, and in deference to an expression of gifts and evidence of God's grace associated with the lay ministry of early Methodism, the certified lay minister shall preach the Word, provide a care ministry to the congregation, assist in program leadership, and be a witness in the community for the growth, missional and connectional thrust of The UMC as part of a ministry team with the supervision and support of a clergyperson.

¶1268 (2016 Discipline)

Requirements prior to interview

1. Must be a certified lay speaker or a person with equivalent training (if not a certified lay speaker, contact the Office of Clergy Life).
2. Made application in writing, including detailed statement as to reasons for application and evidence of how their service in the local church has demonstrated appreciation of the history, polity, doctrine, worship and liturgy of The United Methodist Church, to the district committee on ordained ministry.
3. Form 102 in file, biographical form.
4. Kroll Expanded Background Check on file.
5. Written recommendation by the pastor of the local church where he/she holds membership.
6. Vote of the church council or charge conference (included in recommendation by the pastor).
7. Verification of completion of courses relevant to his/her assignment including preaching and exegesis, the care of the congregation, etc.
8. Written recommendation of the district superintendent.

Suggested Questions

- ☐ Tell us about your journey of faith.
- ☐ Tell us about your leadership experiences in the local church.
- ☐ Tell us how your service in your local church has demonstrated your appreciation of the history, polity, doctrine, worship and liturgy of The United Methodist Church. (This is a required question from the *Book of Discipline*.)
- ☐ Share about your devotional life. How are you growing spiritually?
- ☐ Tell us about your personal strengths...your areas of growth.
- ☐ What have you read that has been helpful in your spiritual life?
- ☐ What 2-3 characters in the Bible emulate your own spiritual life/journey?
- ☐ Talk about your family.
- ☐ Talk about positive and negative relationships in your life.
- ☐ What are the most stressful aspects of ministry for you?
- ☐ What do you do to take care of yourself physically?
- ☐ Share a conflict situation in which you have been involved and how you dealt with it.
- ☐ Share a leadership experience you have had this year.

Action Required

Majority vote of the district committee on ordained ministry.

Interview for: Recertification of Certified Lay Minister

Note: The district committee must let the certified lay minister know what is required. The certified lay minister has the responsibility for requesting these reports be sent to the district committee/submitted to the Office of Clergy Life.

1. Written recommendation with a ministry review by the church council or charge conference from the congregation of which he/she is a member, and if different, the congregation where assigned.
2. Verification of satisfactory completion of an approved continuing education event (at least 1 CEU or equivalent).
3. Written recommendation of the district superintendent.
4. Interview and recommendation of the district committee on ordained ministry.

Suggested Questions

- ☐ Share several highlights of your ministry this year.
- ☐ Tell us about your leadership experiences.
- ☐ What were some of your frustrations in ministry this year?
- ☐ What are your plans for the future, ...personally, ...for the church?
- ☐ Share about your devotional life. How are you growing spiritually?
- ☐ Tell us about your personal strengths...your areas of growth.
- ☐ What are you doing to avoid burnout?
- ☐ What are your goals for the year ahead?
- ☐ What have you read that has been helpful in your spiritual life?
- ☐ Talk about your family.
- ☐ Talk about positive and negative relationships in your life.
- ☐ What are the most stressful aspects of ministry for you?
- ☐ What do you do to take care of yourself physically?
- ☐ Share a conflict situation in which you have been involved and how you dealt with it.
- ☐ Share a leadership experience you have had this year.
- ☐ Are you considering licensed or ordained ministry? If not, why not?

Action Required

Majority vote of the district committee on ordained ministry.

Interview for: Recommendation for Reinstatement (local pastor or certified candidate) or

Readmission: ¶1320.4 – Local Pastor (2016 Discipline)

- ☐ To Provisional Membership or Associate Membership
- ☐ After leaving the ministerial office to full membership as elder or deacon
- ☐ After honorable location or administrative location
- ☐ After termination by action of the annual conference

*Must appear before the dCOM or its predecessor that approved discontinuance.

Requirements prior to interview

--Immediately contact the Office of Clergy Life for detailed instructions

--Contact the Bishop's Office for supervisory file information

--Depending on the circumstances, most of the following will be required:

- A. Kroll Expanded Background Check
- B. File documents related to the reasons for discontinuance or withdrawal
- C. A written request by the candidate on his/her reasons and qualifications for readmission and a statement on the circumstances relating to their discontinuance or withdrawal
- D. A satisfactory report and recommendation by their charge conference and pastor
- E. Other letters of recommendation, if needed
- F. Report of career counseling, if applicable
- G. Completed Medical Report on form 103
- H. Psychological Assessment
- I. Additional information or report on requirements set by the Board or annual conference when discontinued or withdrawal.

Suggested Questions

Questions would be determined based on the nature of the discontinuance or withdrawal.

Action Required

- ☐ For reinstatement as a local pastor, majority vote which is a recommendation to the Board of Ordained Ministry and Cabinet.
- ☐ For readmission to associate, probationary, or full membership, majority vote which is a recommendation to the Board of Ordained Ministry (which will require an interview with the Conference Relations Committee) and Cabinet.

Behavioral Health Guidelines for Boards of Ministry

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" (Paras. 301.2 and 666.9). 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 mental and behavior health 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 our 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 Psychological Assessment offers the following Behavioral Health Guidelines as a resource in candidacy selection. **As the title suggests, these are general guidelines rather than hard-and-fast regulations.** They relate to behavioral health issues, broadly defined, that our Committee believes are critical to effectiveness in ministry and the avoidance of misconduct. Our primary purposes in this effort:

- to guide and advise dCOMs and BOMs
- to assist BOMs in establishing their own standards
- to provide a vehicle for BOMs to raise questions about standards
- to flag areas of concern

Our Committee 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.

Definitions:

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.

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)

- Morbid obesity (Body weight 100 lbs or more above maximum ideal weight)
- Markedly underweight (body weight at least 15% or more below the candidate's healthy minimum weight)
- 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: Management of personal finances

Standard: The candidate is not in debt so as to embarrass the Church.

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 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: 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 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: 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 candidates use of alcohol

Exploratory Questions:

The "CAGE" questions below may be helpful: two or more "yes" answers predicts alcoholism with about 75% accuracy.

1. Have you ever felt you should **C**ut down on your drinking?
2. Have people **A**nnoyed you by criticizing your drinking?
3. Have you ever felt bad or **G**uilty about your drinking?
4. 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: 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: 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: 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 relationship 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.

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 life 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?

Recommendations

Consider further assessment.

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.

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.

ADDENDUM
Definitions of Improper Sexual Conduct

1. 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.

2. Sexual impropriety

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

- a) behavior, gestures or expressions which may reasonably be interpreted as inappropriately seductive or sexually demeaning,
- b) making inappropriate comments about an individual's body,
- c) making sexually demeaning comments to an individual,
- d) making comments about an individual's potential sexual performance,
- e) in a counseling relationship, requesting details of a person's sexual history when not clinically indicated for the type of consultation,
- f) requesting a date,
- g) initiating conversation regarding the sexual problems, preferences, or fantasies of either party,
- h) kissing of a sexual nature,
- i) sharing or displaying pornographic material with another person.

3. 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.

A-Z Glossary of Terms

Annual Conference: A geographical area and organizational term. Defines a region that includes all UM churches and ministries in that area. Most clergy serving churches in that area are provisional, licensed or ordained members of that conference. Members of the annual conference meet yearly (in NC, this gathering takes place in June) to approve business, set the budget, and promote ministry programs and other items of interest to the members. Each church also has a number of laypersons (equal to the number of their clergy) who vote on governance and policy for that conference. The annual conference votes to commission provisional clergy members, to ordain deacons and elders and to license local pastors for pastoral ministry. The bishop (in NC, Bishop Connie Mitchell Shelton) appointed to that conference presides over the annual meeting and all matters affecting the ministry of that annual conference (§11, ¶1601-¶1657).

Associate Members: Licensed local pastors who have reached age 40, completed at least four years of full-time service as a local pastor, and the five-year Course of Study and have been approved by the board of ordained ministry. They are not ordained, but are available for full-time service and are guaranteed an appointment as clergy to a local congregation within the annual conference. Associate members have voice and vote in every matter except those pertaining to ordination, ordained clergy and voting for delegates to Jurisdictional and General Conference (§321-§323).

Bishop: During a jurisdictional conference session, bishops are elected from among the elders, by lay and clergy delegates. Bishops oversee and supervise one or more annual conferences and meet with other bishops to lead The United Methodist Church. Bishops commission and ordain deacons and elders and appoint licensed local pastors, deacons and elders from the annual conference in which they lead. They are authorized to "guard the faith, order, liturgy, doctrine and discipline of the church" and to "lead all persons entrusted to their oversight in worship, in the celebration of the sacraments, and in their mission of witness and service in the world." Bishops elected in the U.S. serve in that capacity until retirement and remain on the Council of Bishops after retirement (§401-§403). The Bishop of the NC Annual Conference is Bishop Leonard Fairley.

Board of Ordained Ministry (BOM): Each annual conference has a Board of Ordained Ministry consisting of deacons, elders, licensed local pastors or associate members, and laypersons who are appointed to that board by the bishop. The board recruits, nurtures and supports those in an annual conference who are seeking and preparing for ordained ministry or continuation as a licensed local pastor and evaluates whether or not they have the gifts and grace for ministry and are ready to serve. The board is the "credentialing" body for clergy in an annual conference and is also responsible for continuing formation programs for clergy and for matters relating to changing conference relationships and clergy conduct (¶1635).

Book of Discipline (BOD): The book of law for The United Methodist Church that determines how the church governs itself. It includes historical information, doctrinal standards, laws, and policies that can only be changed by the General Conference. After each General Conference session it is updated and reprinted based on decisions made by delegates of the General Conference session.

Book of Worship (BOW): The basic handbook for worship services that reflects the theology of The United Methodist Church. It contains the order of services, the liturgy for Holy Communion (referred to as Word and Table), Baptism, marriage, funerals, healing, and many other types of worship services. It also contains blessings, prayers, and resources for weekly worship services and special celebrations.

Cabinet: The bishop and district superintendents when meeting as a body. Each annual and missionary conference has a Cabinet.

Call, Call Story, or Calling: A specific experience or set of decisions, circumstances or other type of encouragement that lead an individual to believe that God has asked her or him to enter ministry. Many clergy will refer to being "called" to preach or serve. During the candidacy process, candidates for licensed or ordained ministry will be asked to write and/or talk about how they have discerned God's calling in their lives and how and where they believe God is calling them to serve.

Campus Minister or University Chaplain: Campus ministers and university chaplains serve on college campuses across the United States and around the world. Some work in United Methodist campus ministry units (sometimes called Wesley Foundations). Some work in cooperation with other denominations in ecumenical campus ministries. Others are chaplains at United Methodist-related colleges and universities. Ministry with students is an important part of the work, but these ministers are also concerned with faculty, staff, and administration—in other words, they work with the whole campus. Some campus ministers and chaplains are ordained deacons and elders. Others are laypeople who have received training for ministry on campus.

Candidacy/Candidacy Process: A discerning and preparatory period of time and the process by which those wishing to serve as licensed local pastors, deacons or elders apply, prepare and are evaluated by their annual conference to serve on behalf of The United Methodist Church (§§310-§314).

Candidacy Mentors: Ordained deacons, elders, associate members or full-time local pastors (who has completed the Course of Study), who have been trained to provide guidance to candidates. They are assigned to lead mentoring groups, typically made up of 5-8 candidates. These mentors assist the candidate in understanding the process and further discerning their call as they become certified and licensed or provisional members (§§310.1b, §311).

Candidate: A person who is seeking recommendation or is enrolled in the candidacy process and wishes to serve as a licensed local pastor, deacon, or elder.

Certified Candidate: Someone who is enrolled in the candidacy process; has been approved by their local ministry setting; has submitted requested information to the district committee on ministry; and has been interviewed, and approved to continue the process of moving toward licensing or ordination (§311).

Chaplain: Chaplains and pastoral counselors are elders or deacons who engage in ministries of pastoral care in specialized settings. Endorsed chaplains and pastoral counselors are appointed to prisons, hospitals, the armed forces, and counseling centers where they serve people in difficult places outside the local church (§1421.5).

Charge Conference: This refers to a meeting of the local church that includes every member of the church's governing body (such as a church council) as well as clergy appointed to serve that church. It meets at least once a year, usually in the fall, to review church goals and objectives, elect new church leaders, set clergy salaries, and recommend and continue persons for candidacy (§246).

Clergy: Commissioned and ordained deacons and elders; associate members and licensed local pastors serving under the full or part-time appointment of a bishop (§142).

Clergy Mentor: An ordained deacon, elder, associate member, or full-time local pastor who has completed the Course of Study, who has been trained to provide guidance to provisional deacons or elders during the provisional period. They assist provisional members in the process as these persons further discern their call and prepare for ordination.

Course of Study (COS): Refers to prescribed classes taken by licensed local pastors for ministry preparation. Part-time and full-time local pastors attend the Course of Study while serving local churches (typically for a month during the summer). The full course takes at least five years to complete. Upon completion of the initial course of study, the pastor may become an associate member if they have completed four years of service and are at least forty years of age (¶318-¶320.5).

Deacon: Deacons are 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 in a ministry that connects the two. Deacons devote themselves to the ministry of the Word, which includes sharing, teaching, and modeling the word of God. Additionally, deacons are called to a lifetime of servant leadership, serving both the congregation and the world. A deacon is called to serve all people, particularly the poor, the sick, and the marginalized, and to equip and lead the laity in ministries of compassion, justice, and service. The deacon's leadership role exemplifies Christian discipleship, equips and supports all baptized Christians in their ministry, and connects the church's worship with its service in the world (¶328-¶331).

Deaconess and Home Missioner: Deaconesses (laywomen) and home missioners (laymen) are professionally trained persons who have been led by the Holy Spirit to devote their lives to Christ-like service under the authority of the Church. They are approved by the General Board of Global Ministries and commissioned by a bishop. They have a continuing relationship to The United Methodist Church through the General Board of Global Ministries. Deaconesses and home missioners are available for service with any agency or program of The United Methodist Church. Deaconesses and home missioners may also serve in other than United Methodist Church agencies or programs, provided that approval is given by the board in consultation with the bishop of the receiving area (¶1913-¶1918).

Discern: Synonymous with "decide." However, it carries an underlying assumption that the decision (generally to serve in ministry) is made with considerable thought, prayer, study and attention to God's call in one's life.

District: One of several smaller geographic areas within a conference. Each church in an annual conference is also part of a district. Each district is supervised by a district superintendent. The number of districts in an annual conference varies depending on the size of the annual conference. The North Carolina Conference has 8 districts.

District Committee on Ministry (dCOM): Evaluates, certifies and recommends to the board of ordained ministry all those who apply to become licensed or ordained. The committee conducts annual interviews to certify candidates, recommend candidates for provisional membership and license all local pastors serving within the district (¶310-¶314).

District Superintendent (DS): An elder appointed to serve as supervisor of the churches within a geographical area of an annual conference, called a district. They serve as extensions of the bishop's authority and supervise clergy serving within that district (¶419-¶425).

Elder: Elders are persons called by God, authorized by the church, and ordained by a bishop to a lifetime ministry of Word, Sacrament, Order and Service. Like all baptized Christians, elders are committed to a lifetime of service, although this service manifests itself in different ways than deacons or the laity. The elder embodies, or brings to life, Christ's teachings in servant ministries and servant leadership and gives pastoral leadership in ordering the life of the congregation for service. Elders devote themselves to the ministry of the Word, which includes primary responsibility for preaching and teaching the Word of God (¶332-¶335).

Endorsement: Endorsement is the process to ensure that pastoral counselors and prison, hospital or military chaplains are qualified and prepared to appropriately represent the denomination in their ministry setting (¶1421.5).

Episcopal: Refers to something relating to a bishop. For instance, an "episcopal area" is the area under the supervision of a particular bishop.

Extension Ministry: Refers to elders who serve in ministry outside of a local church setting. It includes such settings as conference administration, chaplaincy, pastoral counseling, teaching, etc. The bishop must appoint the elder to that position, although this typically happens at the elder's request and through consultation with the bishop (§§343- §344).

Fellowship of Local Pastors and Associate Members: The Fellowship provides mutual support for its members for the sake of the life and mission of the church. All licensed local pastors and associate members shall be members of and participate in the Fellowship (§323). The chairperson of the Fellowship for LP 2023-24 is the Reverend Bruce Petty.

Full Connection: An ordained deacon or elder serves in "full connection" to an annual conference, as a member of that annual conference. This means that their life and work is amenable to the annual conference and that they are supported by and accountable to that annual conference. Ordained members in full connection have voice and vote in all matters related to the annual conference, to the clergy of that conference, to the general conference, and constitutional amendments of the UMC.

General Conference: The international gathering and business meeting of the United Methodist denomination. It convenes once every four years, in a different location. There are 998 delegates (half are ordained, half are laypersons) representing each annual and central conference. This body decides on petitions to change the Book of Discipline. It is the only body authorized to make decisions and speak on behalf of The United Methodist Church (§18, §501-§511).

Itinerate: Indicates that an ordained elder, associate member, or full-time local pastor will agree to serve where the bishop appoints them. This system of appointments is referred to as itinerancy.

Jurisdiction: A group of annual conferences within a geographical region in the United States. There are five jurisdictions in the U.S. (North Central, Northeast, South Central, Southeast, and Western). The Jurisdictional Conference meets every four years after General Conference and consists of representatives from each annual conference in that region. The conference's primary responsibility is to elect bishops for their jurisdiction (§512-§537). North Carolina is part of the Southeastern Jurisdiction.

Layperson: A member of a local church. In The United Methodist Church laypersons are responsible for leadership in all levels of the denomination – from the local church, to the district, to the annual conference, Jurisdictional Conference and General Conference. Laypersons are also involved at all levels of decision-making about candidates for licensed and ordained ministry.

Licensed Local Pastor (LLP): Someone who is not ordained as an elder or deacon but is appointed to preach, conduct worship and perform the duties of a pastor in a particular setting. In order to meet the requirements, a person must complete licensing school and receive an appointment to serve. Licensed local pastors must attend the Course of Study each year and meet with the dCOM annually for approval and eligibility for continued licensing. Licensed local pastors are not required to earn a Master's of Divinity or to itinerate, are not guaranteed an appointment and usually serve smaller congregations (§316).

Ministerial Education Funds (MEF): Grant money made available annually to Undergraduate Juniors/Seniors and to seminary students who are University Senate approved schools. Recipients agree to serve in the NC Conference at least for as many years as they receive the grant money.

Online Candidacy Application System (OCAS): The online system at the General Board of Higher Education and Ministry Web site through which all who wish to begin candidacy for licensed or ordained ministry must register. After submitting call statement, and other paperwork, the Office of Clergy Life will enroll candidates into OCAS (§311.1).

Ordained Ministry: The specific ministry of deacons and elders who have been ordained by a bishop to serve in The United Methodist Church (§301-§304).

Order of Deacon/Order of Elder: A covenant community within the church to mutually support, care for, and hold accountable its members for the sake of the life and mission of the church. These orders, separately or together, seek to respond to the spiritual hunger among clergy for a fulfilling sense of vocation, for support among peers during this stressful time of change in the Church, and for a deepening relationship with God. All ordained persons upon election to full membership in the annual conference shall be members of and participate in an order appropriate to their election (§ 306). The chairperson for the Order of Elders for 2016-19 is the Reverend Laura Stern. The chairperson of the Order of Deacons for 2016-19 is the Reverend Betty Ann Buckley.

Ordination: Performed by the historic laying-on of hands by the bishop. This signifies that the church affirms and continues its apostolic ministry through these persons - empowered by the Holy Spirit. Those ordained commit to living and proclaiming the whole gospel. Persons may be ordained as deacons or elders. Deacons are ordained to the ministries of Word and Service. Elders are ordained to the ministries of Word, Sacrament, Order and Service (§§ 301-304).

Pastor/Staff Parish Relations Committee (PPRC or SPRC): The committee in each local congregation that assists clergy and staff members in setting priorities for leadership and service to the church. Responsible for evaluating all candidates for licensed or ordained ministry from that congregation. To begin the candidacy process one of the first steps is for a candidate to be approved by this committee and by the charge conference of his or her local congregation. Candidates then apply to their district superintendent and dCOM to continue the candidacy process (§ 258.2).

Polity: Refers to the rules and traditions of the UMC. It includes the *Book of Discipline*, history, practices, and beliefs of the denomination.

Professional Certification: The church's recognition that an individual has met the required academic standards, experience, and continuing study necessary to achieve and maintain professional excellence. Persons may receive professional certification in one of the following areas: business administration, camping and retreat ministries, children's ministry, Christian education, communications, evangelism, music ministry, older adult ministry, spiritual formation, or youth ministry. Laypersons and clergy can receive professional certification and studies are available for undergraduate or graduate students. Para-professional certification is available for those who do not hold a Bachelor's degree.

Provisional Membership: The step in the ordination process between certified candidacy and ordination. Once someone has been commissioned they serve as a provisional member of the annual conference. Those applying for ordination as deacons or elders must first serve as a provisional member for a minimum of two years, depending on the requirements of a specific annual conference. After completing the requirements for provisional membership a person can apply for ordination and full membership in the annual conference. Provisional membership is completed when a person is ordained a deacon or an elder, or a decision is made not to proceed toward ordination and provisional membership is ended (§§ 324-327).

Seminary or Theological School: Term for post-graduate school of theology. These schools educate and prepare people for ministry. They offer a wide variety of classes, from ancient languages, to urban ministry, to church history and Biblical studies. The United Methodist Church supports 13 theological schools and seminaries, and students preparing for ordination must graduate from an institution that is approved by the University Senate of the UMC.

University Senate: The senate is an elected body of professionals in higher education created by the General Conference to determine which schools, colleges, universities, and theological schools meet the criteria for listing as institutions affiliated with The United Methodist Church. Students preparing for ordination must complete their educational requirements at an institution approved by the University Senate (§§ 1414-18).

Vocation: 1. a particular occupation, business, or profession; calling. 2. a strong impulse or inclination to follow a particular activity or career. 3. a divine call to God's service or to the Christian life. 4. a function or station in life to which one is called by God: the religious vocation; the vocation of marriage.