

***District Committee
On Ordained Ministry
HANDBOOK***

**UPPER NEW YORK
ANNUAL CONFERENCE
THE UNITED METHODIST
CHURCH**

2026-2027 Edition.01

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References are to the 2020/2024 *Book of Discipline*

The District Committee on Ordained Ministry

Upper New York Annual Conference

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The District Committee on Ordained Ministry

Upper New York Annual Conference

Preface

The District Committee on Ministry is amenable to the annual conference through the Board of Ordained Ministry (§666.1) and serves to fulfill this mission in each district of the Annual Conference.

Our charge is to create consistent practices among all the dCOMs by specifying required actions while leaving space for the committees, prompted by necessity and guided by the Holy Spirit, to do all they can to discern and facilitate each candidate's calling to lay, certified, licensed, or ordained ministry (§666.4).

This handbook contains current policies and practices as stated at the time of publication. If any errors are found, corrections or additions needed, or alterations required, please communicate with the BOM dCOM Division Chairperson:

Rev. Patricia Hubman

pastorpathubman@gmail.com

A digital edition of this handbook and downloads for Forms can be found at:

<https://www.unyumc.org/ministries/resources-for-dcom>

Upper New York Annual Conference: Our Clergy Covenant

We have a sacred calling as United Methodist clergy. Together we share in a covenant relationship in a community of clergy (active and retired Elders, Deacons, Associate Members, Provisional Members, Local Pastors). This covenant is to be marked by respect, honesty and integrity in all interactions with our colleagues.

As a covenant community we are to be held accountable to one another for our conduct. We constantly seek to move onward toward perfection in our conduct as clergy. In order to help us to that end, we seek the guidance and wisdom of the covenant community of clergy to hold us accountable to the highest ethical standards in all of our ministry settings.

When we fail to uphold one another to the highest ethical standards we damage the relationships among clergy. We lose trust in one

another and we damage, sometimes irreparably, the trusting relationship with those we serve. As clergy, the greatest gift we are granted is the trust of those whom we serve. What follows below is a Covenant for all professionals in ministry. This covenant provides a common understanding and agreement of clergy conduct to which clergy hold one another accountable.

United Methodist clergy under appointment:

- Develop through continued education, maintenance of personal growth and competence for ministry.
- Maintain proper physical care and discipline.
- Keep time commitments faithfully and use time responsibly, acknowledging that ministry cannot fit into conventional time slots.
- Follow high moral standards in all forms of communication including social media and conduct, including:
 - keeping confidences
 - communicating honestly and appropriately.
- Are above reproach in all financial transactions. Remain sufficiently free from unnecessary financial debt, accepting financial responsibility as not to burden one's congregation or the Annual Conference. Will not leave a community to accept a new appointment without arranging for payment of local financial obligations.
- Maintain a healthy emotional and social balance and boundaries between pastoral identity and self-identity; private and community life; self and other.
- Provide for the care of family and spouse and, as a parsonage family, addresses their needs and concerns through appropriate lines of communication.
- Will leave church and parsonage in good condition, accepting financial responsibilities for damage done to parsonage beyond normal wear and tear or age.

Each United Methodist clergy person, in performing professional responsibilities:

- Is spiritual leader to all members and constituents of the ministry setting.
- Is open to serve in the community of the charge recognizing that appointment is to the church and the community. Offers pastoral care to those in need in the community who are not under the care of another clergyperson.
- Represents the itinerant and connectional process honestly and justly, taking responsibility for personal decisions in appointment changes.
- Is above reproach in pastoral performance of responsibilities and duties outlined in ¶328, 340, 341 - 2012 *Book of Discipline* of The United Methodist church.
- Maintains confidentiality in all situations that require confidences be upheld including:
 - counseling and pastoral care situations,
 - personnel matters within the ministry setting
 - personnel and appointment matters in the Annual Conference
 - a clergyperson's responsibilities in the Annual Conference, such as Board of Ministry, budgeting processes, etc.
- As appropriate to one's Order, accepts appointment and is willing to be itinerant, faithfully performing duties.
- Does not accept employment beyond the full-time appointed charge, except with the consent of the cabinet and the local church staff-parish relations committee.
- In writing and preaching, gives appropriate credit for words or ideas drawn from another source.
- Maintains connectional responsibilities which include providing updated records for the next clergyperson and seeing that ministry shares are current.
- Prepares the ministry setting for change of clergy.
- Refrains from pastoral contact in previous appointments.
- Respects the ministry setting of another clergy. Provides service only at that clergy's invitation. All inquiries are referred to the resident clergy.
- Seeks to uphold, enhance and support the work of another professional in ministry and in no way undermines his or her efforts to serve.

- Acts with integrity in all matters in reference to one's predecessor and one's successor.
- Does not violate the sacred trust between clergy/parishioner or those in pastoral care by seeking sexual, social or business favors at any time.
- Refrains from all sexual involvement with those who have sought and/or received pastoral or spiritual counseling at any time and their family members.

Adapted from Code of Ethics of the Iowa Annual Conference. Adopted by UNYAC Board of Ordained Ministry, January 27, 2014.

RESPONSIBILITIES OF THE dCOM

The ministry of the district committee on ordained ministry (dCOM) is defined in the *2020-24 Book of Discipline* ¶666

Guidelines from the General Board of Higher Education and Ministry for the work of the dCOM can be found in the Board of Ordained Ministry Handbook, Chapter 2, at: [BOM-Handbook_complete.pdf](#)

Each dCOM is responsible for the following actions:

1. Meeting and encouraging candidates' progress as they enter and explore their calling as Inquiring, Exploring, and Declared Candidates.
2. Recommending candidates for **certification** for **licensed** or **ordained ministry** (criteria: Fitness for Ministry, page 7)
3. Recommending certified candidates for **provisional membership** prior to interviews with the UNY Board of Ordained Ministry (criteria: Readiness for Ministry, page 7)
4. Recommendation for **licensing** for pastoral ministry (criteria: Fitness for Ministry, page 7)
5. Recommending local pastors for **associate membership** prior to interviews with the UNYAC Board of Ordained Ministry (criteria: Effectiveness in Ministry, page 7)
6. Recommendation for **readmission** to conference membership prior to interview with the UNYAC Board of Ordained Ministry.
7. Aid and interpret the work of a congregation's **pastor-parish relations committee** as they approach the task of recommending candidates from their Charge.
8. Review and recommend those prepared to serve as **certified lay ministers**
9. Aid the local church in the process of enlisting persons for ordained ministry as deacon or elder or for service as a local pastor, encourage persons to enter the candidacy program, and maintain an accurate list of all candidates under its care.
10. Follow the steps of this guidebook. Taking the steps out of order will confuse the standardization of the process and may lead to confusion of people crossing District lines and confuse or delay their process.
11. Know the Policies of the Board of Ordained Ministry (BOM) including the deadlines for work to be submitted for the Provisional Process and Provisional Interviews.
12. Assist the DS in assigning mentors and assist the BOM in training mentors. **We recommend all mentors be trained once a quadrennium.**

Please note that all actions are *recommendations* to the UNY Board of Ordained Ministry and shall be reported to the Board through the “**dCOM Action Report**” (page 41-42) by the district committee registrar. **The dCOM Secretary will also send copies of minutes to the appropriate BOM Registrars or Lay Servant Ministries Director Appendix A, pg. 56, or as noted at the bottom of the Action Report).**

INTERVIEW OVERVIEW

Please be aware there are seminary students, bi-vocational LLPs and CLMs who cannot meet during “normal” 9-5 hours.

A. Candidacy Certification: Assess *Fitness for Ministry*

- Spiritual fitness
- Psychological fitness
- Physical fitness
- Potential for effectiveness

Interviews are required at these points:

1. A “Getting-to-know you” interview, as well as “checking in” interviews will be conducted annually for each candidate, as long as they are active in the candidacy program.
2. *Certification Interview* following completion of all steps for certification.
3. Annual renewal of certified candidacy.

B. Licensed Local Pastor: Approve continuation of certification *Pastoral Ministry*

- Fitness issues (See Section A above) Readiness issues
- Recommendation for licensing and conference relationship (either part-time or full-time)
- Annual continuation of certification for pastoral ministry, including effectiveness in ministry
- Part-time LLPs have 12 years and Full-time LLPs have 8 years to complete COS (§319.3). Those time limitations are calculated based on the date they begin COS courses and ONLY include time serving under appointment. (may be fully on-line)

C. Associate Membership: Assess Effectiveness in Ministry

- Assess areas of developing competency
- Review academic background
- Consider current practice of ministry
- How has theological understanding evolved since licensing?

D. Provisional Membership: Assess Readiness for Ministry

- Areas of developing competency
- Review academic background
- Consider field education experiences, internships, other practice of ministry experiences
- How has theological understanding evolved since certification?
- One year as a licensed local pastor or one year of certified candidacy as sufficient preparation time for eligibility to pursue provisional membership. (§324. 1)

E. Certified Lay Minister: Assess and approve based on criteria below

- Complete approved coursework and Laity Process to become a CLM

- Involvement in the covenant and plan for ministry in the local church
- Work as part of a ministry team, supervised by credentialed clergy.
- Bi-annual interview for those not in a pastoral role, Annual review for those in a Pastoral Role

F. From Another Denomination

- Submit transcripts to BOM for GBHEM review
- Introduce the Polity of the United Methodist Church, role of the dCOM
- Begin to dialogue about the expectations and understandings of United Methodist Theology so the dCOM can support and inform the challenges the church and candidate may have.
- Areas of developing competency
- Covenant and plan for ministry in the local church.

dCOM LEADERSHIP JOB DESCRIPTIONS

District Superintendent

- Meet with new inquiring candidates to hear their sense of call and to aid their enrollment to the candidacy program via the Passage UMC website.
- Provides a packet to the inquiring candidate which includes the candidacy checklist (page 46-47, GBHEM Form 102 (Biographical Information Form), the legal clearances and background check, medical report form, candidate's disclosure form and the instructions and authorization form for the expanded background check.

[RESOURCES / BOARD OF ORDAINED MINISTRY FORMS](#)

- Assigns candidacy mentors and provides their contact information to the candidate.
- Assists the dCOM chair in scheduling candidates' interviews.
- Presides at charge conference where the vote is taken on candidates.
- Nominates district committee on ordained ministry members and leaders. Obtains, from the former district, the files of candidates and local pastors moving to the district.
- Reviews the Clergy Report to Annual Conference, ensure all information is complete, accurate.

Chairperson

- Sets date and place for meetings.
- Schedules interviews with candidates.
- Sets the agenda and presides at the meetings.
- Makes sure that all dCOM leaders are following through on their responsibilities.
- Makes sure that the dCOM interviews candidates at the appropriate time with the appropriate documents in hand.
- Communicates the actions of the dCOM to the candidate within 24 hours.
- This person should be sure to have access to ebridge. Please contact your District Superintendent if you do not.

Secretary

- Sends meeting notices, if not done by the chair.
- Records and sends minutes of the meetings to the dCOM members and to BOM registrars and co-chairs in a timely manner.
- Keeps a file of all dCOM minutes.

Psychological Assessment Officer

- Receives psychological assessment summary report from BOM.
- Provides summary reports on candidates to the dCOM prior to interviews

Registrar

- Tracks all candidates through ebridge. The Registrar makes sure the Superintendent and BOM Candidacy have the forms they need.
- Maintains the official digital file for each candidate (digital copies sent to BOM Registrar(s) and District Superintendent). A “Candidates District File Content Checklist” (page 46-47) or “Local Pastor’s District File Content Checklist” (page 48-49) shall be used to keep a record of documents in each candidate’s file. Ministerial personnel record keeping procedures shall be governed by page 23 of the *Guidelines for Managing Records of the Annual Conference, 2017 Edition* prepared by the General Commission on Archives and History of The United Methodist Church.

http://s3.amazonaws.com/gcah.org/Resources/Guidelines_Publications/ConfRetSched.2017.pdf

- Ministry Action reports for all candidates, their transcripts, their written responses to the annual questions for dCOM, any correspondence and their mentor reports (if applicable) should be entered into ebridge. If the registrar does NOT have access to ebridge please work with your district superintendent.
- Uses the Action Report Form (UNY dCOM Handbook page 40) to record and report to the UNY Board of Ordained Ministry all actions of the dCOM. Keeps a copy of this Action Report Form in the candidate’s file. Please send the Ministry Action report to Cindy Muder at Candidacy@unyumc.org Cindy helps keep track of the information for the BAC.

Board of Ordained Ministry Representative

- Exchanges questions and information between the district committee and the UNY Board of Ordained Ministry.
- Assists in training members of the district committee.

dCOM INTERVIEW GUIDELINES
FOR ALL TRACKS, please note the KSAP definitions and table
<https://www.unyumc.org/ministries/bom>

Guidelines for preparing for an interview

- Allow adequate time before each interview to review the file, the written documents, the psychological assessment, and other documents. Discuss concerns and issues that need to be addressed in the interview.
- Consider the culture of the person being interviewed and the culture of the community the person will be serving in. Offer hospitality, grace and cultural sensitivity to the person being interviewed including but not limited to extra time to complete work, interpreters for spoken and written work/interview, extra time for the interview, time for the dCOM to understand the culture of the community and person being interviewed.
- Decide on the most important questions and who will ask each question (do not have the chair or one person ask all the questions).
- Decide on the size of the interview group. (When necessary, the dCOM can subdivide for most interviews and then report back a recommendation to the total committee for the final decision.) Refer to the *UNY dCOM Handbook* to make sure all items are in the file prior to the interview.
- Decide how long the interview will be.

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.
- Welcome the candidate to the interview and introduce them by name and church to dCOM.
- State the purpose of the interview (acquaintance, staying connected, 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 timekeeper.
- 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 timekeeping rather than asking questions. Ask someone to close with prayer.

dCOM INTERVIEW GUIDELINES (continued)

Things to remember

- For all interviews, a candidate's pastor, staff and/or family members and any lay persons from the candidate's church shall excuse themselves from the room, interview, discussion, and voting. And further, the mentor shall also excuse themselves from the discussion and voting.
- Decide how to begin the interview. Do not begin with the psychological assessment.
- The candidate does most of the talking.
- Remember that the mentor, if present, may not speak in the interview. Mentors are invited to be present at all interviews. Their role is *non-evaluative*. This should also be clear to the mentors when their written reports are prepared and submitted to the dCOM.
- Do not allow other committee members to answer questions or to engage in an argument or discussion with the candidate that distracts from the purpose of the meeting.
- 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. Follow-up letters from the dCOM to candidates (after an interview/vote) will also be copied to the mentor.
- 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 distinctions between candidates on the elder track and the deacon track. Ask appropriate questions.

Interview for: First-time and Pre-certification candidates

Requirements prior to interview

1. A professing member in good standing of The United Methodist Church or a baptized participant of a recognized United Methodist campus ministry or other United Methodist ministry setting for a minimum of one (1) year.
2. Graduation from an accredited high school or certificate of equivalency.
3. Review of The Christian as Minister with a clergyperson.
4. Take Disciple 1
5. Letter from candidate written to the district superintendent with a call statement and request for admission to candidacy studies program.
6. GBHEM Form 102 in file (Biographical Information Form)

[RESOURCES / BOARD OF ORDAINED MINISTRY FORMS](#)

Suggested Questions

- Tell us about your journey, your call to ministry.
- Tell us about your leadership experiences in the church.
- What are your plans for the future ... personally ... for the church?
- Share aspects of your devotional life. How are you growing spiritually?
- Tell us about your personal strengths ... your areas of growth.
- What are your goals for the year ahead?
- What have you read that has been helpful in your spiritual life?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- Talk about your family.
- Talk about positive and negative relationships in your life.
- What do you do to take care of yourself physically? Mentally? Emotionally?
- Share a leadership experience you have had this year.
- Tell us about your seminary classes (for seminary students).

Action Required

The dCOM does not vote on candidates prior to certification. The secretary does record the meeting in the minutes and the registrar sends an [action report](#) found on page 34 to the UNY BOM Registrar of Candidates.

Interview for: Candidacy Certification for Ordained or Licensed Ministry

Candidate's Requirements prior to dCOM interview

These are mandatory steps.

RESOURCES / BOARD OF ORDAINED MINISTRY FORMS

1. GBHEM Form 102 in file (Biographical Information Form)
2. All required criminal and background checks, with documentation in file.
3. GBHEM Form 103 Medical Report completed (all pages, 1-4) in file.
4. GBHEM Form 114 candidate's Disclosure Form.
5. GBHEM Form 104 in file, indicating recommendation by the candidate's home church charge conference (or equivalent body) as specified by the dCOM
6. Written response to statements in *The Book of Discipline* ¶310.1(d), 310.2.(a). (Email to the dCOM chairperson prior to the interview)
7. A current Psychological Assessment report completed. The follow up appointment must occur BEFORE coming before the Board of Ordained Ministry.
8. If there are red flags in the Background Check or the Psychological Assessment they should be addressed at the district level BEFORE the candidate comes before the Board of Ordained Ministry.
9. Disciple 1 or Complete Disciple 1 or college (seminary) level OT AND NT courses.

NOTE: For persons who are interviewing for a status change, psychological assessment reports completed prior to July 1, 2015, under the former process will no longer be valid after 5 years.

Documents to be copied and distributed prior to meeting (electronically when possible) to committee members (either by Registrar or Chairperson)

- a) #1 from above: Form 102 (Biographical Information Form)
- b) #6 from above: Written response to statements in ¶310.1.(d), 310.2.(a)
- c) Candidacy Mentor Report
- d) #7 from above: Psychological Assessment officer's summary report

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?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- 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? Mentally? Emotionally?
- 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 of dCOM

Individual **written** ballot, **three-fourths** majority required to certify (§310.2.(e)). Criteria:

- Spiritual fitness
- Physical fitness
- Psychological fitness
- Potential for effectiveness

Interview for: Licensing for Pastoral Ministry (Local Pastor)

Requirements prior to interview

1. Be a certified candidate.
2. LLPs are expected to complete the full Dismantling Racism from Imagination to Action (DRIA) curriculum within 2 years of initial licensing for continued licensing.
3. Candidates may enroll in Course of Study regardless of their appointment status. It is highly recommended that the candidate takes COS 121 "Bible 1: Introduction" as soon as possible. (allows LLPs who are not under appointment to enroll in Course of Study courses)
4. A candidate has NO more than 12 years to continue as a candidate. (§313.5)

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?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- 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? Mentally? Emotionally?
- 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 quarters vote with recommendation to license as a local pastor.
- Once approved by the District Superintendent and the dCOM, the candidate shall register for and complete licensing school.

- The dCOM registrar sends an [action report](#) (pages 40-41) to UNY BOM Candidacy Candidacy@unyumc.org and to the District Superintendency Assistant.

Criteria:

- Spiritual fitness
- Psychological fitness
- Physical fitness
- Readiness for ministry
- Potential for effectiveness

Candidate may receive a license after:

- dCOM approves for licensing,
- Candidate successfully completes licensing school or 1/3 of their seminary education and an appointment is made.

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 to request these reports be sent to the district committee. ¶313

Annual recommendation of the candidate's home church charge conference in file. **For those seeking Provisional Membership:**

NOTE: *On July 1, 2014, candidates in all districts must complete this requirement as delineated in this document. (Those who were certified candidates before July 1, 2014, may meet the requirements as already determined by their dCOM)*

Address the following question in preparation for fulfilling the requirement of ¶324.2 (service requirement):

“How are you using your gifts for ministry and leadership outside of the local church?”

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?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- What are your goals for the year ahead?
- Questions about theology and sacraments.
- What have you read that has been helpful in your spiritual life?
- 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? Mentally? Emotionally?
- 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

- Simple majority vote of those present (¶313, ¶666.7) required to renew.
- The dCOM registrar sends an action report (page 34) to the UNY BOM Registrar of Candidates.

Additional Information

If an individual whose license or candidacy is not renewed requests to appeal the dCOM's decision they may take the following action:

Candidates or Licensed Local Pastors who have been denied continuance have the right to ask a **full member** of the annual conference to make an appeal to the clergy session. If such an appeal is made, it would then be up to the bishop to decide how such an appeal would be dealt with in the clergy session. Otherwise the decision of the dCOM is final.

Interview for: Local Pastor Continuance (annually)

Continuance as a Local Pastor is described in the *Book of Discipline* ¶319

Requirements prior to interview

Note: The district committee must let the local pastor know what is required. The local pastor has the responsibility to request these reports be sent to the district committee.

1. Transcripts from undergraduate school, Course of Study, or seminary
2. Written mentor report
3. Please submit answers to three of six questions posed to you prior to your meeting. (dCOM chooses from the question options listed below)
4. Upon completion of the Course of Study reimbursement request form, those attending any residential or extension Course of Study (COS) will be reimbursed \$75.00 for each course that has been passed with a “C” or better. The dCOM should encourage payment of the remainder for each course in accordance with the policy of the Upper New York Board of Ordained Ministry that:
 - a. ½ of the remainder shall be paid by the Local Pastor
 - b. ½ of the remainder shall be paid by reimbursement to the pastor by the Local Pastor’s church appointment (to be included as part of Accountable Reimbursement Plan in compensation plan document presented at appointment or church conference)
4. A person who has completed licensing school, but is not appointed, may take up to 4 courses at Course of Study. That person will not receive any Conference financial aid or reimbursement for these courses.
5. Those who have completed the Course of Study no longer require a mentor.
6. LLPs are expected to complete the full Dismantling Racism from Imagination to Action (DRIA) curriculum within 2 years of initial licensing for continued licensing. This training is available online and in person. Regional Coordinators can be contacted through the following link:
<https://www.unyumc.org/ccorr>
7. All Course of Study (COS) may now be done online (¶321.1,323.6.c.1)
8. LLPs serving in retirement must continue in course of study as it is a liability issue.
9. If retired and serving must continue to be interviewed.

As the local pastor progresses through Course of Study (or seminary) these are the kinds of issues that should be explored in order to assess progress:

Year 1 - Leadership

- Which local church committees are required by the *Book of Discipline* and what is the function of each? How is your church structured for mission and ministry?
- How are you using the distinctive Wesleyan emphases and characteristics of The United Methodist Church to lead your church in making disciples of Jesus Christ?
- Describe leadership qualities which you demonstrate in your ministry and the strengths and weaknesses of those qualities?

Year 2 - Theology

- How do you apply United Methodist theology in your teaching?
- Describe ways your congregation lives out the theology of grace.
- In what ways has your theology of grace shaped your understanding of the Sacraments?

Year 3 - Practice of Ministry

- How has your preaching improved since you were licensed?
- In what ways have your spiritual disciplines affected your practice of leadership in ministry?
- Describe ways you lead your congregation in offering pastoral care?
- Bring a recent worship bulletin and be prepared to talk about your order of worship.
- Describe ways that, in partnership with laity, you make disciples of Jesus Christ, and train and empower these disciples to produce tangible fruits of love of God and love of neighbor.

• Year 4 and beyond

- In years 4 and 5, talk with the local pastor about how they apply their education to their ministry setting.
- For those who have completed COS or M.Div., track continuing education requirements and review progress.

Other Suggested Questions

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?
- 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?
- 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 was 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:

- ¾ majority vote of the committee.
- Send a letter stating the result of the vote to the local pastor each year.
- The dCOM registrar sends an [action report](#) (page 40) to the UNY BOM Candidacy (Candidacy@unyumc.org) and to the District Superintendency Assistant to specify full time or part time service, as determined by the district superintendent or cabinet.

Additional Information

If an individual whose license or candidacy is not renewed requests to appeal the dCOM's decision they may take the following action:

Candidates or Licensed Local Pastors who have been denied continuance have the right to ask a full member of the annual conference to make an appeal to the clergy session. If such an appeal is made, it would then be up to the bishop to decide how such an appeal would be dealt with in the clergy session. Otherwise, the decision of the dCOM is final.

Interview with a Candidate from Another Denomination

It is the responsibility of the dCOM to meet with candidates considering appointments with orders in other denominations.

¶347.3 deals with Transfers from another denomination.

1. GBHEM Form 102 in file (Biographical Information Form)
2. All required criminal and background checks, with documentation in file.
3. GBHEM Form 103 Medical Report completed (both sides) in file.
4. GBHEM Form 114 candidate's Disclosure Form.
5. Psychological Assessment

[RESOURCES / BOARD OF ORDAINED MINISTRY FORMS](#)

6. Please submit to the BOM Registrar the transcripts of the candidate for review (If the candidate desires to have orders in the Methodist Church)

Suggested Questions

- Tell us about your journey, your call to ministry.
- Tell us about your leadership experiences in the church.
- How do you understand the theology and polity of the United Methodist Church?
- Are you comfortable upholding the Theology and Polity of the United Methodist Church?
- What are your plans for the future ... personally ... for the church?
- Share aspects of your devotional life. How are you growing spiritually?
- Tell us about your personal strengths ... your areas of growth.
- What are your goals for the year ahead?
- What have you read that has been helpful in your spiritual life?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- Talk about your family.
- Talk about positive and negative relationships in your life.
- What do you do to take care of yourself physically? Mentally? Emotionally?
- Share a leadership experience you have had this year.

Guidelines for Acceptance as Certified Candidate from Another Annual Conference

¶313.4 *The Book of 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. If a candidate from another Annual Conference requests a transfer, notify your district superintendent and the BOM registrar of the request.
2. The candidate’s file must include all of the following items, which are required by the Upper New York Annual Conference for **certification as a candidate**:
 - [Biographical Information](#) Form (GBHEM form 102)
 - All required [background checks](#)
 - [medical report](#) (GBHEM form 103)
 - [Candidate’s disclosure](#) form (GBHEM form 114)
 - record of the [Charge Conference approval](#) (GBHEM form 104)
 - the [psychological assessment](#)
 - the written response to ministry questions in ¶310.1(d)
 - [mentor report](#)
 - verification of certification as a candidate - annual renewal of candidacy, if applicable.
 - get written permission from candidate to release files and transfer records from previous conference.

In addition to that which is listed above, a **licensed local pastor** must also have:

- documentation of licensing (copy of the license)
 - annual renewal of the license for pastoral ministry
 - transcripts (seminary or Course of Study) if applicable
 - 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 the candidate.
 5. If the candidate is certified and requesting local pastor status, the DS makes a recommendation regarding licensing by the Upper New York Annual Conference. Licensing is dependent upon the person receiving an appointment in the Upper New York Annual Conference.

Action Required

Any [action taken is reported](#) to the BOM Registrar of Candidates (page 40-41) for approval by the UNY BOM.

Interview for: Certified Lay Minister (CLM)

Description: ¶268

- a) **Entrance Requirements:** All persons serving a local church beyond pulpit supply who are not in the process of being licensed or ordained must be enrolled in this program. Persons who are already serving as “congregational leaders” will be given one year to complete the entrance requirements for this program or will not be permitted to serve beyond one year as pulpit supply. This will be monitored by the Upper New York Conference Board of Ordained Ministry (UNY BOM). For dCOM, the only paperwork required is to be the annual report from lay ministries. They should forward a copy of this report to their dCOM in time for their annual dCOM interview, if providing pulpit supply/pastoral support for a church. Status of certified lay servant or equivalent training
- b) [Recommendation of pastor](#) Use CLM Annual Report to the Charge Conference
 - c) [Approval of the charge conference](#) Use CLM Annual Report to the Charge Conference
 - d) [Recommendation of district superintendent](#) Use DS and dCOM Recommendation for Certification
 - e) Complete candidacy level [background check](#) (cost \$100, same procedure as a candidate)
 - f) complete [Safe Sanctuary Training](#)
 - g) Complete an orientation to the certified lay minister program (by UNY BOM).
Topics for orientation to include but not limited to: roles in ministry, role of self-care, role of leadership, mutual team ministry (covenant and expectations)
 - h) [Recommendation of the dCOM](#) (Use DS and dCOM Recommendation for Certification) The Conference Committee on Lay Servant Ministry (The Committee on Lay Servant Ministry approves CLMs, the dCOM acts as the agent of review and effectiveness for the CLM)

Upon completion of the entrance requirements, a person may serve a church or charge as a candidate for certified lay ministry. A certified lay minister is assigned, not appointed, and thus has no legal standing to perform weddings and has NO sacramental privileges.

- 1) **Program Requirements:** Monitored by the dCOM and supervised by the clergy person appointed to that charge.
 - a) Complete courses in the following areas as approved by the dCOM.
 - i. Call Covenant
 - ii. Practice of Ministry
 - iii. Organization of Ministry, United Methodist Polity
 - iv. Complete Disciple 1 or college (seminary) level OT AND NT courses.
 - v. Read [By Water and the Spirit](#) and [This Holy Mystery](#)
 - b) Develop a covenant for mutual team ministry with credentialed clergy and the members of the pastor-parish relations committee (PPRC) and participate in the ministry covenant developed.
 - c) Apply in writing to the district committee on ordained ministry.

Upon completion of the program requirements, recommendation of the local church being served and the supervising elder, and approval of the dCOM, the candidate may become a certified lay minister.

Certified Lay Minister (continued)

3) Continuing Requirements:

- a) Interview every two years: Ministry review by the church council or charge conference of the church/charge being served or where he or she is a member, if unassigned.
- b) Interview Annually if serving a church in a Pastoral Role
 - i) AND complete a [psychological assessment](#) and a [background check](#) within one year
If these assessments cause a financial hardship please talk to your dCOM chair and/or your DS
- c) Satisfactory completion of an approved continuing education event
- d) Recommendation of the district superintendent
- e) Attend and participate in annual conference as an “at large” lay member, if possible.
- f) CLMs are being asked to complete the full Dismantling Racism from Imagination to Action (DRIA) curriculum as part of their annual course work. This training is free. This training is available online and in person and counts as an Advanced Course. Regional Coordinators can be contacted through the following: <https://www.unyumc.org/ccorr>

CLMs serving churches must be interviewed and recommended by dCOM annually ¶205.4

Failure to complete the continuing requirements will result in the certified lay minister being dropped from the program. District Committees on Ordained Ministry will maintain lists of candidates for certified lay ministry, certified lay ministers and certified lay ministers not serving a church.

The dCOM will file every two years the [certification report](#) with the UNY Lay Servant Ministries Registrar regarding all CLMs and CLM candidates. Please also send the report to the District Superintendency Assistant.

Suggested Interview 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. (required question per 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?
- How does your spiritual life/journey emulate 2-3 characters in the Bible?
- 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? Mentally? Emotionally?
- 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 dCOM.
- The dCOM registrar sends a [certification report](#) (page 52) to the Lay Servant Ministries Registrar of Candidates every two years. Please also send to the Superintendency Assistant

Interview for: Re-certification of Certified Lay Minister (every two years) ¶268.4

Once certified, certified lay ministers (CLMs) must meet the following “Continuing Requirements” as monitored by the dCOM and the supervising elder.

- a) Complete at least one additional course each year through one of the following sources: Leadership University, Lay Seminary, Advanced Lay Speakers Course or others as approved by your dCOM with these possible topics: (Para 268.4c BOD)
- UM History
 - Faith Sharing
 - UM Theology
 - Ministry with Children
 - Sacraments
 - Advanced Preaching
 - Youth Ministry Courses
 - in Bible; etc.
- b) *If not assigned*, apply for re-certification in writing every two years to the district committee on ministry (dCOM) upon
1. Ministry Review by the church council or charge conference from the congregation of which he/she is a member. Fill out [CLM Annual Report to the Charge Conference](#)
 2. Satisfactory completion of an approved continuing education event
 3. [Recommendation of the district superintendent.](#)
- c) *If under assignment* (¶205.4), every year with and seek approval from the district committee on ministry (dCOM) after:
1. Ministry Review by the church council or charge conference of the church/charge being served. Fill out [CLM Annual Report to the Charge Conference](#)
 2. Satisfactory completion of an approved continuing education event
 3. [Recommendation of the district superintendent.](#)
- d) Attend and participate in annual conference as an equalization lay member, if possible.

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? Mentally? Emotionally?
- 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 dCOM.
- The dCOM registrar sends a [certification report](#) (page 52) to the Lay Servant Ministries Registrar of Candidates.

Interview for: Recommendation for Associate Membership - ¶322

Requirements prior to interview

1. Must have completed the five-year Course of Study, which may be taken by correspondence or online/distance learning courses. The requirement for History, Doctrine, and Polity must be completed by the appropriate class in Course of Study.
2. Serve at least 4 years full time.
3. Completed a minimum of 60 semester hours toward a Bachelor of Arts or an equivalent degree in a college or university listed by the University Senate.
4. Declared their willingness to accept continuing full-time appointments in the itinerant system.
5. For associate membership, the Board is looking for **effectiveness in ministry**: Knowledge, skills, abilities and personal characteristics, and a cross-cultural mission experience.

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.
- Questions that make the connection between their Course of Study (or seminary) education and their practice of ministry.
- Has your theology changed since you have been in the Course of Study? How?
- Where/what are your support systems?
- What did you learn about yourself and about ministry through the candidacy, course of study, and pastoral experiences?

Action Required

$\frac{3}{4}$ majority vote

Criteria:

1. Academic background
2. Consider current practice of ministry
3. Review how theological understanding has evolved since licensing
4. Effectiveness, evaluated in four areas: Theology, worship & communication, call and life issues, and a cross-cultural mission experience.

The dCOM registrar sends an [action report](#) (page 40) to the BOM Registrar and the Registrar of Candidates.

Interview for: Recommendation for Provisional Membership (aka “Commissioning”)

dCOMs WILL schedule an initial interview prior to June 30th of the year BEFORE the candidate will be going for commissioning interview with BOM (Interviews are traditionally in early March). Prior to the interview the candidate will be asked to write the answers (to be submitted one month in advance of the interview for the dCOM to read) and be prepared to discuss the following questions:

A,B,C,D, and P (§324.7 p. 250).

If the candidate is appointed outside the district the two dCOMs MUST meet to share information so there is a smooth transition for the candidate as they prepare for their formal interviews with the Board of Ordained Ministry.

- A. Describe your personal experience of God and the understanding of God you derive from biblical, theological, and historical sources.
- B. What is your understanding of evil as it exists in the world?
- C. What is your understanding of humanity, and the human need for divine grace?
- D. How do you interpret the statement Jesus Christ is Lord?
- P. Explain the role and significance of the sacraments in the ministry to which you have been called.

The role of the dCOM in this interview is to give encouraging feedback to the candidate and if necessary have the candidate re-write responses to bring to their September interview with the dCOM.

BoM will be looking to see if they can articulate their own theology, ability to locate their personal theology within Wesleyan theology and explain how it is lived out in the ministry setting OR how they would teach it if they aren't already in a ministry setting.

The dCOM chair will communicate the specific areas of concern in writing to the candidate within a week of this initial meeting. The same candidate should also be interviewed in September in final preparation and vote for the BOM interviews. At this time there should be NO hesitation about sending this candidate to BOM.

Please be sure the candidate has taken UMC polity, doctrine and history BEFORE moving them forward to BoM.

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. Has fulfilled the service requirement of §324.2 to the satisfaction of the dCOM by answering the question: “How have you used your gifts for ministry and leadership in the local church, the community, the district and conference?”
4. Met the educational requirements of the *Book of Discipline* (§324) and the Upper New York Annual Conference Board of Ordained Ministry (page 33)
5. Local pastors may fulfill the requirements as delineated under §324.6 UNY 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. For candidates on elder track, declared willingness to accept continuing full-time appointments in the itinerant system.

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 areas including knowledge, skills and abilities and personal characteristics.
- Questions that make the connection between their seminary education and their practice of ministry.
- How has your theology changed since you have been in seminary?
- Where/what are your support systems?
- What did you learn about yourself and about ministry over the past few years?

Action Required

Written ballot with three-fourths majority vote

Criteria:

- Academic background
- Consider field education experiences, internships, other practice of ministry experiences. Review how theological understanding has evolved since certification.
- Review carefully educational requirements. *Raise any questions with the BOM registrar*

The dCOM Registrar sends an [action report](#) (page 40-41) to the UNY BOM Candidacy Candidacy@unyumc.org and to the District Superintendency Assistant.

Board of Ordained Ministry

Upper New York Conference, The United Methodist Church

Visit the [BOM page of the Conference Website](#) for additional requirements.

EDUCATIONAL REQUIREMENTS FOR PROVISIONAL MEMBERSHIP

The *Discipline* lists specific course requirements that must be included in graduate theological education prior to provisional membership in The United Methodist Church (see ¶324.3 and ¶324.4 for Elder, ¶324.5 for Deacon). Candidates for deacon or elder shall have completed the basic graduate theological studies (BGTS) in the areas of Old Testament, New Testament, theology, church history, mission, worship/liturgy, evangelism, and United Methodist doctrine, polity, and history. These courses may be included within or in addition to a seminary degree.

Note that the Upper New York Conference requires verification that at least ½ of education requirements are completed prior to commissioning and provisional membership. United Methodist doctrine, polity, and history must be completed prior to interviewing for provisional membership (BOM 5/28/18).

Board of Ordained Ministry Upper New York Conference, The United Methodist Church

THE PSYCHOLOGICAL ASSESSMENT

1. The psychological assessment provides the dCOM with indicators of probable psychological fitness and psychological readiness for ministry. At the candidacy level, the purpose of the psychological assessment is to determine gross psychopathology as well as issues for further growth and development, particularly in the areas of emotional intelligence and leadership style.
2. How a Candidate is Assessed – When candidate/mentor/dCOM determines that he/she is ready for testing, the dCOM approves this next step by issuing an application with a letter of instructions to their candidate. The candidate completes this form, signs it, and sends it with the candidate's portion of the fee, \$400. (If this is a hardship, please let your dCOM know)
3. Make the check to "Upper New York Conference" with your name in the memo.
4. Send check with the completed application to the [psychological assessment officer](#) for the BOM.
5. The Psychological Assessment officer acknowledges receipt of the application and fee by email.
6. Also, the Psychological Assessment officer provides contact information for the Ministerial Assessment Specialist. (MAS)
7. The candidate contacts the MAS to begin the process of assessment.
 - a. Assessments are done on an individual basis as candidates apply.
 - b. The candidate receives a packet from the MAS, completes it and scans it to return to the MAS. The MAS interprets the responses and contacts the candidate to schedule a mandatory follow up appointment
 - c. This report is sent to the candidate for their records. They may give copies of this report to whomever they wish.
 - d. The MAS makes an interview appointment via video conference with the candidate at which time s/he reviews the report. The MAS takes notes of the review; yet does not change the report.
8. The psychological assessment report along with the notes taken during the review are sent to the Board of Ordained Ministry Psychological Assessment officer and the District Superintendent. Betsy O'Flynn receives a copy to put in the person's ebridge profile account.

9. The District Office makes the report available to the member of the District Committee on Ordained Ministry who is designated as the reviewer of the report.
10. The report is kept in the candidate's personnel file until the candidate is moved on through commissioning, is discontinued, or withdraws.
11. The completed evaluation with the attached follow up interview is valid for an indefinite period of time. In the event that it seems necessary to retest a candidate, a follow-up interview is made with the MAS. Generally, there is no extra cost for this follow-up assessment interview.

NOTE: For persons who are interviewing for a status change, psychological assessment reports completed prior to July 1, 2015, under the former process will no longer be valid after 5 years.

Board of Ordained Ministry Upper New York Conference, The United Methodist Church BACKGROUND CHECK PROCESS

It is the policy of our Board of Ordained Ministry that when an individual applies for a change in status (other than retired, full time to part time or part time to full time or discontinuance) a [background check](#) without any concerns, red flags or issues needs to be completed within five years.

(BOD ¶324.10) There are several areas that our background check company will investigate:

- Social Security number validation
- Identity verification
- National and State Criminal database check
- National and State Sex Offender database check
- An in-county courthouse check of records
- Credit Check
- Department of Motor Vehicles Check

Individuals would complete the [paperwork](#) (four-page fillable application) and send a check for \$100.00.

The information is then uploaded to our background check company's website (secured). Some of the data is returned within 1-4 days. However, the "in county courthouse check" can take longer. An individual who has lived in several states and/or several counties within a state would need multiple "in county courthouse checks" completed. At times an individual might forget to indicate a maiden name or a "Jr.", etc. Other times a search is delayed because a person apparently lived at two locations at the same time.

The length of time that it takes to receive a background check varies according to many different issues.

Here are some red flags that get looked at in a background check:

- o Felony or misdemeanor conviction (a no-contest is viewed as a conviction)
- o Two or more moving violations (traffic)
- o Public Records (Federal criminal records search)
- o Listing on the Sex Offender database (history that poses risk of sexual harassment, sexual assault to adults or children, or history of any sex-related offense)
- o Three or more late payments on the credit check
- o Non-mortgage / non educational debt of \$100,000+
- o Being able to only pay the minimum charge on credit card bills
- o Items in collections
- o Items that are in the process of being sent to collections
- o Bankruptcies
- o Financial Judgments
- o Orders of Protection

Of the above noted items the Board looks for – some are clearly reason for concern. Many others need to be explained. It takes time to review and determine if sufficient issues are present that need further investigation and explanation; or if it is something we will review in six months or a year; or if the District Superintendent will develop a plan to address the issue and report back to the Background Check Coordinator for the Board of Ordained Ministry for the Upper New York Conference. Once the background check is completed the report will be reviewed. Once the background check is reviewed it then takes time to draft and send letters to the District Superintendents and dCOMs. We share all of this to let you know that there is no “normal background check. They take time to gather the data, to interpret it and to share it. See [Behavioral HEALTH Guidelines of General Board of Higher Education & Ministry](#).

BOM asks for self-disclosure of information. Some people choose to disclose speeding tickets or other minor infractions. Other people choose not to share some information thinking it won't show up on the report. It may be difficult for Candidates to decide what to self-disclose. We encourage candidates to be honest. Serious questions get asked at the Board level if something is revealed during the background check process that has not been self-disclosed.

Candidates for commissioning or ordination should be sure their background check is current. If a new check is needed it should be done by September before the candidate comes to BOM. BOM reserves the right to delay a person's interviewing process due to a combination of red flags. When there are red flags, the DS and dCOM will receive a letter stating so and with a summary chart from the background check that explains where the candidate needs to grow in their financial spirituality. When there are multiple red flags, the candidate will be required to participate in a growth plan that s/he/they will make with the dCOM and DS. A report of this plan should be sent to the BoM Background check contact person to be kept in their background check file. A Credit check is required every year after to show growth. Therefore, dCOMs should make every effort to help the candidate grow in this area BEFORE allowing the candidate to move to the next step.

Resources:

A candidate can contact Rev. Susan Ranous who specializes in clergy finances at sranousacctg@twcny.rr.com for help.

Saving Grace: A Guide to Financial Wellbeing put out by Wespath and Abingdon Press is a book study/workbook available from Cokesbury or Amazon

The “Safe Sanctuaries” background check we use in the local church - is not adequate. A statement from the local police department indicating no record of any arrests – is not adequate.

Find the General Board of Higher Education and Ministries' Behavioral Health Guidelines: [Click here](#).

Resources for Candidacy Advisors & Mentors:

UMCares has been transitioned to Passage UMC. Passage UMC is the software database used by the General Board of Higher Education and Ministry (GBHEM) to track the progress of an individual. It is used for all persons in the candidacy process and for those seeking Commissioning and Ordination. If you need help with Passage UMC please contact Rev. Derek Hansen. dhollishansen@gmail.com

The Board of Ordained Ministry provides mentor training twice a year, once in June and once in November. Please contact the [Board of Ordained Ministry vocational discernment team](#) for more information.

APPENDIX A

UPPER NEW YORK ANNUAL CONFERENCE BOARD OF ORDAINED MINISTRY CONTACTS

Candidacy & Course of Study Registrar: Cindy Muder
PO Box 207, Washington Mills, NY 13479
315-898-2000, Ext 2091
Candidacy@unyumc.org

Board of Ordained Ministry Registrar: Rev. Caroline Simmons
BOMRegistrar@unyumc.org

LINKS

BOM Page and key contacts <https://www.unyumc.org/board-of-ordained-ministry>

dCOM Resources <https://www.unyumc.org/dcom-handbook/mentor-handbook>

BOM Forms <https://www.unyumc.org/bom-forms>

Passage UMC <http://passageumc.org>

Psychological Assessment <https://www.unyumc.org/bom-forms>

Background Checks <https://www.unyumc.org/bom-forms>

Behavioral Health Guidelines <https://www.unyumc.org/board-of-ordained-ministry>

APPENDIX B

UPPER NEW YORK ANNUAL CONFERENCE

Board of Ordained Ministry Recommended Reading

The Christian as Minister; An Exploration into the Meaning of God's Calling

Publisher: GENERAL BOARD OF HIGHER ED
Publication Date: 09/2013
Binding: Paperback
ISBN-13: 9780938162636
Retail Price: \$12.99
Edited by: Meg Lassiat

Understanding God's Call: A Ministry Inquiry Process

Publisher: GENERAL BOARD OF HIGHER ED
Publication Date: 03/2009
ISBN-13: 9780938162827
Retail Price: \$10.95
Author: Sharon G. Rubey

By Water and The Spirit: Making Connections for Identity and Ministry

Author: Gayle Carlton Felton
ISBN: 978-0-88177-201-2

This Holy Mystery: A United Methodist Understanding of Holy Communion

Publisher: DISCIPLESHIP RESOURCES DIST.CT
Publication Date: 04/2005
Binding: Paperback
ISBN-10: 088177457X
ISBN-13: 9780881774573
Retail Price: \$15.00

FORMS

These forms are now available as electronic forms. If you need help or cannot access electronic forms, please contact candidacy@unyumc.org. Once you fill out a form/checklist, you will receive an email with a copy of the form. Then you may download or print a copy if you wish.

District Committee on Ordained Ministry Action Report to the BOM Candidacy Registrar may be accessed at: <https://www.unyumc.org/dcom-handbook/mentor-handbook>

CANDIDACY MENTOR REPORT/Mentor Report Form to dCOM may be accessed at:
<https://www.unyumc.org/dcom-handbook/mentor-handbook>

LLP/CONTINUING CANDIDACY MENTOR REPORT/Mentor Report Form may be accessed at:
<https://www.unyumc.org/dcom-handbook/mentor-handbook>

Upper NY Annual Conference Candidate's District File Content Checklist
To access, [CLICK HERE](#).

Upper NY Annual Conference Local Pastor's District File Content Checklist
To access, [CLICK HERE](#).

Upper New York Conference Board of Ordained Ministry Application for Psychological Assessment may be found at: <https://www.unyumc.org/dcom-handbook/mentor-handbook>

Upper NY Annual Conference [Steps Into Ministry](#) Checklist for Candidates may be accessed at:
<https://www.unyumc.org/dcom-handbook/mentor-handbook>

RECOMMENDATION FORM for Certification or Re-certification CERTIFIED LAY MINISTER District Superintendent and District Committee on Ministry. To access, [CLICK HERE](#).

Upper NY Annual Conference Steps Into Ministry Checklist for All Candidates plus additional steps for Commissioning/Ordination as Deacons/Elders

Adopted 10/01/13, Revised 6/2026

For all Candidates

- Graduate of an accredited high school or received a certificate of equivalency.
- Shall be a professing member in good standing of The United Methodist Church or a baptized participant of a recognized United Methodist campus ministry or other United Methodist ministry setting for a minimum of one (1) year
- Study “*The Christian as Minister*” book with a mentor
- Disciple 1, COS Bible course(s) or seminary level OT/NT courses
- Develop a statement of call.
- Write to the District Superintendent requesting admission to the candidacy process
- Meet with the Staff/Pastor-Parish Relations Committee or equivalent body specified by the district committee on ordained ministry to consider the statement of call and to be interviewed in light of Wesley’s historic questions
- Meet with a charge conference, or body specified by the District Committee on
- Ordained Ministry (DCOM), at a meeting convened to recommend the candidate to the District Committee on Ordained Ministry.
- Meet with the District Committee on Ordained Ministry.
- Assignment of a candidacy mentor
- Safe Sanctuary Training not more than 5 years old
- Background check, dated no less than 5 years old
- Psychological Assessment report
- Medical Report (Form 103)
- District Superintendent’s letter requested.
- District Superintendent’s letter uploaded to PassageUMC
- Autobiographical Narrative Statement (in addition to Form 102) uploaded to Passage|UMC
- Official Transcripts requested from all educational institutions and programs
- Official Transcripts submitted to Registrar
- Application Form 105 completed and uploaded to Passage|UMC
- Disclosure Form 114 completed and uploaded to Passage|UMC
- Biographical Info Form 102 completed and uploaded to Passage|UMC
- Theological Reference Form 109 completed and uploaded to Passage|UMC

In Addition for Commissioning and Provisional Membership:

- DCOM recommendation By October 15.
- Completion of Educational Requirements (2020/2024 *Discipline* para. 324) verified by UNY Board of Ordained Ministry through the Registrar and notification given to candidate
- Written questions uploaded to Passage|UMC
- Bible Study Teaching Plan uploaded to Passage|UMC
- District Committee on Ordained Ministry (DCOM) report submitted and uploaded to Passage|UMC

In Addition for Ordination and Full Membership:

- Written request to BOM to be interviewed for Ordination by October 15.
- Completion of Educational Requirements verified by UNY Board of Ordained Ministry through the Registrar and notification given to candidate (2020/2024 *Discipline* para. 330 for Deacon, 335 or Elder)
- Commissioning in 2018 or later (8 years maximum)
- Equivalent of two years full-time service under episcopal appointment (equivalency must be verified by the Board of Ordained Ministry)
- Full Participation in Provisional Residency Program
- Sermon (Oral Proclamation) presented and video-recorded
- Sermon (Oral Proclamation) manuscript or transcript uploaded to Passage|UMC
- Sermon (Oral Proclamation) video uploaded to Passage|UMC
- Fruitfulness project completed within the Provisional period
- Fruitfulness project reflection report uploaded to Passage|UMC
- Written questions uploaded to Passage|UMC
- In-Church or In-Situation interview conducted
- In-Church or In-Situation report uploaded to Passage|UMC
- Mentor's report requested
- Mentor's report uploaded to Passage|UMC
- Any additional individual requirements (e.g. CPE) completed and reports reflections uploaded to Passage|UMC

Integrated KSAP's and Leadership Competencies

Integrated KSAP's (from DeShon Study) and Leadership Competencies (UNY Conference)

Knowledge	Skills	Abilities	Personal Characteristics
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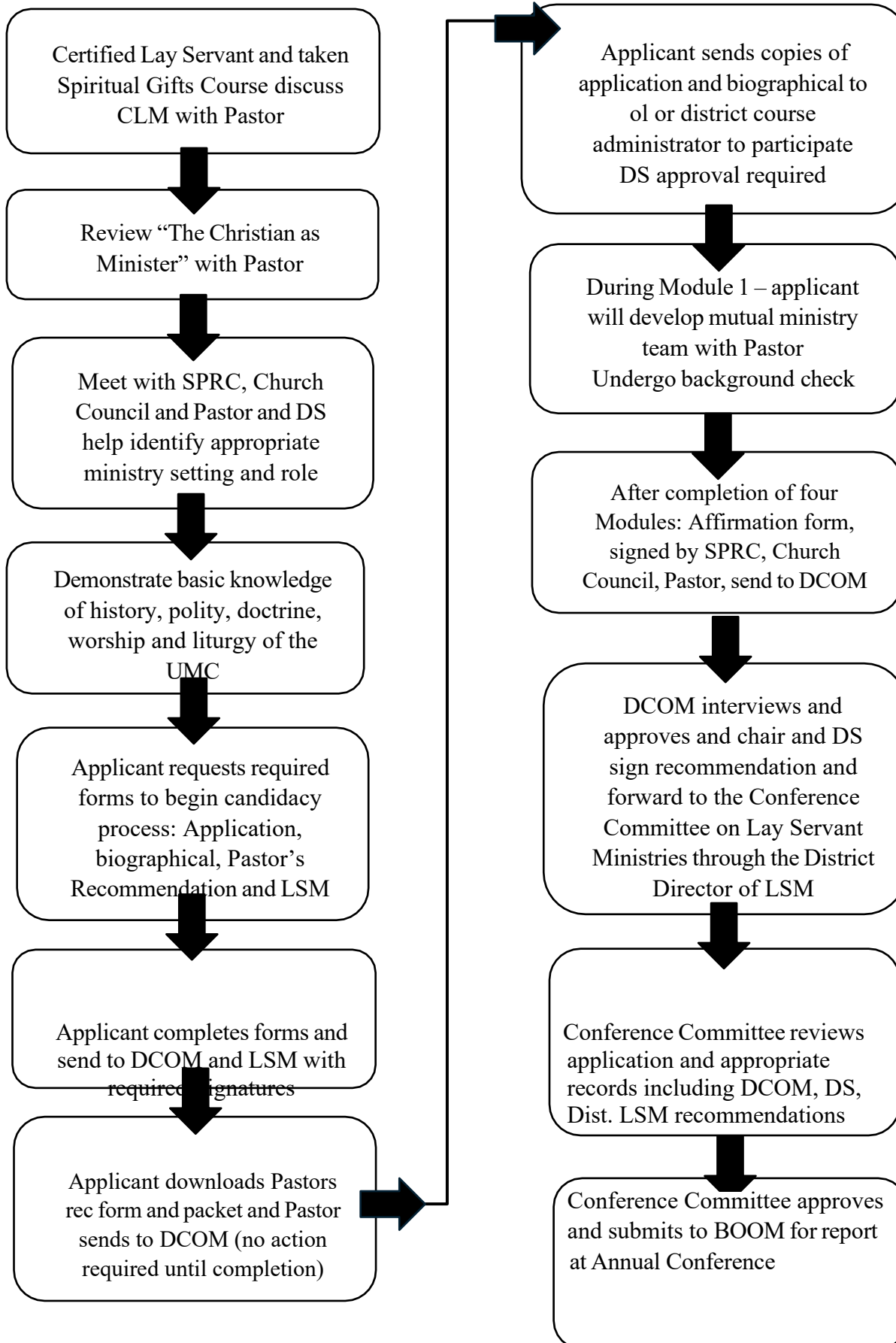
Leadership Competencies

Methodist Wesleyan Ethos Systems Thinking Intentional Discipleship System	Ministry Planning Leading Change Vision & Alignment Passionate, Relevant Worship Strategic Thinking/Systems Thinking	Faith-Sharing/Evangelism Intentional Discipleship System From Inward to Outward Comfort with Ambiguity Complex Problem-Solving Collaboration Learning Ability	Spiritual Life Leading Change Self-Awareness & Self-Control
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KSAP's

Management & Administration Principles Counseling Principles Ministry Setting (demographics, history) Theology & Scripture (includes Soteriology and Christology) Sacramental Theology Theological Reflection UM Doctrine Training Principles, Learning Styles	Active Learning & Listening Conflict Management Decision-Making Discernment Exegetical Skills Motivating Others Negotiating Skills Written Communications Oral Communications/Public Speaking Time Management Spiritual Disciplines Teaching	Adaptability Calling to Ministry Inductive Reasoning Memorization & Comprehension (oral & reading) Trust in God Theological Reflection	Achievement Orientation/Initiative Attention to Detail Authenticity/Openness Balance & Self-Care Calling to Ministry Dependability Empathy Integrity Willingness to Seek Help Passion Patience Persistence Risk-Taking Stress Tolerance
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CERTIFIED LAY MINISTER FLOW CHART



OVERVIEW- INTENT OF LAY MINISTRY/LICENSED LOCAL PASTOR CATEGORIES {CERTIFIED LAY MINISTRY HANDBOOK P.10}

	Lay Supply	Lay Speaker	Lay Minister	Licensed Local Pastor
What is the intent Of th is category of Ministry?	Fills an immediate, Temporary need for ongoing pulpit supply	Fills an immediate Need for occasional Pulpit supply	Fills an ongoing need for congregational leadership as part of a ministry team.	Fills an ongoing need for Congregational leadership as a clergyperson while appointed
Training		+ Lay Speaker Track + 1 Advanced Course every 3 Years	+ Certified Lay Ministry Modules 1-4/ Disciple 1 + 1 Advanced Course Every two years	+ Licensing School + Disciple 1 Bible Study + Course of Study
Supervision		+ District Committee On Lay Servant Ministries	+ Supervising Clergy Person + Mutual Ministry Team + Conf. Comm. On LSM + Mentor	+ District Comm. on Ordained Ministry
Support		+ District Committee On Lay Servant Ministries	+ Mutual Ministry Team + District Comm. on Ordained Ministry + Conf. Comm. On LSM + District Supt.	+ Clergy Mentor
Accountability	+ District Superintendent	+ Local charge Conference + District Committee On Lay Servant Ministries	+ Local Church/ Ministry Review + Mutual Ministry Team For Covenant + District Comm. on Ordained Ministry + Conf. Comm. On LSM + Conference Requirements for Background checks and/ Or psychological Assessment + Conf. requirements Safe Sanctuaries, Boundaries training	+ District Superintendent + District Comm. on Ordained Ministry + Candidacy Requirements for Background checks, Psychological Assessment + Conf. requirements Safe Sanctuaries, Boundaries training