Upper New York Mentoring Handbook 2026 ed.

Candidacy Mentors, Clergy Mentors and Supervising Clergy
Of Licensed Local Pastors and Lay Supply

Written and authorized by the Vocational Discernment Division
of the Upper New York Annual Conference Board of Ordained Ministry.

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i. Preface

Mentoring is a vital component of the ministerial formation process in the Upper New York Conference. Whether guiding candidates for ordination, Licensed Local Pastors, or Lay Supply ministers, mentors serve as companions, advisors, and spiritual leaders on the journey of ministry. This Mentor Handbook is designed to provide clear, authoritative guidance for all aspects of mentoring within our conference.

This handbook is written from the mentor's perspective, offering insights, expectations, and best practices for those who serve in this critical role. *However, it is intended to be a valuable resource for mentors, mentees, District Committees on Ordained Ministry (dCOMs), and District Superintendents, ensuring consistency and clarity in the mentoring process.*

As a living document, the Mentor Handbook will be reviewed and updated annually to reflect any changes in policies, standards, or best practices. It is made publicly available for any individual seeking to understand the role of mentoring in the Upper New York Annual Conference.

Additionally, the Board of Ordained Ministry (BOM) requires all mentors—whether serving candidates for ordination, Licenced Local Pastors, or Lay Supply—to complete official Mentor Training. These training sessions will be offered at least twice a year and be hosted by BOM to ensure that mentors remain well-equipped to fulfill their responsibilities with excellence and faithfulness.

May this handbook serve as a valuable tool in strengthening and supporting those called to ministry, and may all who engage in mentoring do so with wisdom, grace, and a deep commitment to the growth of those they guide.

ii. Responsibility Notice:

Having read and digested this material, and having been fully trained, we ask that you do not agree to be a mentor or supervisor if you are not prepared to invest your time and energy with the Mentee/Lay Supply. Other than the call and effort of the candidate, quality of mentor is the most pivotal factor in the ultimate success of a candidate.

By agreeing to be a mentor, in any capacity, you are committing yourself to a calling of your own - to foster and guide the potential leaders of our denomination. We humbly ask that you move through your own time of spiritual discernment before committing to this holy, covenant relationship with a mentee.

Section I - Definitions and References

Relevant ¶ of the *Book Of Discipline* referring to mentoring: ¶310, ¶311, ¶316, ¶327, ¶334, ¶349

There are 2 kinds of Candidates

- Beginning Candidates are anyone who has expressed an interest in licensed or ordained ministry and is not yet a Certified Candidate.
    - "Beginning Candidate" is the first status a candidate will inhabit regardless of their education or clarity of call.

- Certified Candidates are those who have done the necessary steps to become Certified and have been approved by ¾ of their District Committee on Ministry
    - An individual must be a Certified Candidate in order to be appointed as a Licensed Local Pastor.

There are two types of Mentors:

- Candidacy Mentors trained to provide counsel and guidance related to the candidacy process.
    - Candidacy mentors are clergy in full connection, associate members, or full-time local pastors who have completed the Course of Study or Seminary.
    - Beginning Candidates will be assigned a Candidacy Mentor by the District Committee on Ordained Ministry in consultation with the District Superintendent.
    - Candidacy Mentors will work with the Beginning Candidate until they become a Certified Candidate and receive an appointment as a Licensed Local Pastor at which time a Clergy Mentor will be assigned.
    - It is possible for a Candidacy Mentor to continue as a Clergy Mentor at the discretion of the dCOM and Superintendent.

- Clergy Mentors are trained to provide mentorship to Licensed Local Pastors as well as assist Certified Candidates applying for provisional membership or Provisional Members as they seek ordination.
    - Clergy mentors are clergy in full connection, associate members, or full-time local pastors who have completed the Course of Study or Seminary.
    - Clergy mentoring begins when a person receives an appointment as a local pastor and continues until they complete Course of Study or Seminary.
    - A dCOM or District Superintendent can require a mentor beyond that time if deemed appropriate.

Section II - Beginning Candidacy Process

(From *Beginning Candidate Status* to *Certification Interview*)

Prerequisites to Candidacy:

To begin this process, a candidate must 1. Be a professing member in good standing of the UMC or a baptized participant of a recognized United Methodist campus ministry or other United Methodist ministry setting for one year 2. Have completed a High School diploma or equivalent certificate

The following is from the "Steps Into Ministry" checklist:

(***written from the candidate's perspective***)

- ☐ If you are sensing a call to ministry, the first step is to make an appointment to talk with your Pastor.
    - ☐ If for whatever reason that isn't possible, you can talk with another ordained United Methodist pastor or deacon in your area, or even your local District Superintendent.
- ☐ Read and discuss *The Christian As Minister* book with them.
    - ☐ In order to officially begin the candidacy process, you need to have been a member of the United Methodist Church or baptized participant of a recognized UM campus ministry or other UM ministry setting for one year.
    - ☐ You also need a high school diploma or equivalent certificate.
    - ☐ All through this process, it will be very important that you keep a copy of everything (letters, forms, dates) for your records.
- ☐ Send a letter to your district superintendent, including a statement about your call (as noted below), requesting that you would like to begin the candidacy process.
    - ☐ You can find contact information for your district office through our Upper NY Annual Conference UMC website : Districts | United Methodists of Upper New York.
    - ☐ Write your statement of call, using Wesley's historic questions (see below). Consult with your pastor (or equivalent in a campus ministry setting) to request a meeting of your church's Pastor/Staff Parish Relations Committee (or equivalent body specified by the dCOM) to consider your statement of call and to be interviewed in light of Wesley's historic questions found in *2020/24 Book of Discipline* ¶310.1.d:
        - ☐ Do they know God as pardoning God? Have they the love of God abiding in them? Do they desire nothing but God? Are they holy in all manner of conversation?
        - ☐ Have they gifts as well as evidence of God's grace, for the work? Have they a clear, sound understanding; a right judgment in the things of God; a just conception of salvation by faith? Do they speak justly, readily, clearly?
        - ☐ Have they fruit? Have any been truly convinced of sin and converted to God, and are all believers edified by their service?
    - ☐ The S/PPRC (or equivalent) will vote according to these instructions found at the end of Wesley's historic questions: "As long as these marks occur in them, we

believe they are called of God to serve. These we receive as sufficient proof that they are moved by the Holy Spirit."

- ☐ Get a letter or some official documentation from the S/PPRC (or equivalent), stating their approval and the date, for your records and the dCOM's records.

- ☐ After approval by S/PPRC (or equivalent), work with your pastor to meet with a Charge Conference (or body specified by the dCOM) called to recommend you to the dCOM as a candidate for ministry.
  - ☐ At the Charge Conference, approval must be by two thirds written ballot.
  - ☐ Get a copy of the official minutes from this Charge Conference for your records and the dCOM's records.
- ☐ Complete GBHEM Form 104 obtained from Board of Ordained Ministry | United Methodists of Upper New York (unyumc.org) indicating recommendation by your home church (or equivalent campus ministry) and submit to dCOM Registrar.

- ☐ The District Superintendent will help you schedule a "get to know you" meeting with the District Committee on Ordained Ministry (dCOM).
- ☐ The District Superintendent will assign you a mentor.
- ☐ Work through the candidacy process with your mentor over a period of months.
  - ☐ Your DS will help you get signed up with Passage|UMC online candidacy system. It is important to make sure they have your name, email address, location information, track choice, and mentor before being added.
  - ☐ Discuss the Candidacy Guidebook, Answering the Call
  - ☐ Obtain a certificate for Safe Sanctuaries Training (not more than 2 years old). Complete (and keep copies of) the following (Board of Ordained Ministry United Methodists of Upper New York (unyumc.org):
    - ☐ Background Check ($100 fee)
    - ☐ Psychological Assessment (dCOM will send you an application; $300 fee)
    - ☐ GBHEM Form 102 - Personal Data Inventory
    - ☐ GBHEM Form 103 - Medical Report
    - ☐ GBHEM Form 114 - Disclosure Form

Becoming a Certified Candidate - *2020/24 Book of Discipline* ¶310.2

After completing all the steps above, you are ready to apply to be a Certified Candidate.

- ☐ Request to meet with the District Committee on Ordained Ministry (dCOM) for your interview applying to become a Certified Candidate.
- ☐ Candidates must complete "Disciple: Becoming Disciples Through Bible Study" (also known as Disciple 1) or have completed at least one college-level Bible course.
- ☐ Prior to this meeting (check with your dCOM for deadline), submit the following
  - ☐ Written responses to the historic Wesley questions (2020/24 *Book of Discipline* ¶310.1d):
    - ☐ Do they know God as pardoning God? Have they the love of God abiding in them?
    - ☐ Do they desire nothing but God? Are they holy in all manner of conversation?

- ☐ Have they gifts as well as evidence of God' grace, for the work? Have they a clear, sound understanding; a right judgment in the things of God; a just conception of salvation by faith? Do they speak justly, readily, clearly?
- ☐ Have they fruit? Have any been truly convinced of sin and converted to God, and are all believers edified by their service?

☐ Written response to the following (*2020/24 Book of Discipline* ¶310.2a):

- ☐ The most formative experience of your Christian life
- ☐ God's call to licensed or ordained ministry and role of the church in your call
- ☐ Your beliefs as a Christian
- ☐ Your gifts for ministry
- ☐ Your present understanding of your call to ministry as elder, deacon, or licensed ministry
- ☐ Your support system

☐ Written information that may help the dCOM determine gifts, evidence of God's grace, fruit, and demonstration of the call to licensed or ordained ministry;

☐ Written agreement, for the sake of the mission of Jesus Christ in the world and the most effective witness of the gospel, and in consideration of your influence as minister, to make a complete dedication of yourself to the highest ideals of the Christian life as set forth in ¶102-104, ¶160-166. To this end agree to exercise responsible self-control by personal habits conducive to bodily health, mental and emotional maturity, fidelity in marriage and celibacy in singleness, social responsibility, and growth in grace and the knowledge and love of God.

☐ Check with your dCOM to see if they have any other requirements specific to your District for items to be submitted for this meeting.

☐ Contact your dCOM Registrar and confirm that the following items are in your file:

- ☐ Personal Data Inventory Form (102)
- ☐ Medical Information Report (103)
- ☐ Declaration of Candidacy and Charge Conference
- ☐ Recommendation Form (104)
- ☐ Disclosure Form (114)
- ☐ Written Responses a,b,c, and d above
- ☐ Candidacy Mentor's Report
- ☐ Background Check (done no more than 5 years prior to the date of your meeting with dCOM)
- ☐ Psychological Assessment Report
- ☐ High School Diploma (or equivalent certificate) and any other academic progress documents, such as college transcripts

☐ Your mentor is welcome to accompany you to all dCOM meetings. However, they will be in a supportive role as a silent presence and not take part in the dialogue.

☐ The dCOM will let you know their decision and, if approved, will submit a District Committee on Ordained Ministry Action Report to the BOM Registrar.

More about the Psychological Exam:

- Psychological testing is a crucial part of the candidacy process.
- The test is administered by a certified psychologist who will produce a report that will be shared with the candidate and the District Committee On Ministry.
- To begin this process, the candidate will fill out a Psychological Assessment Application Form. The test will be formally ordered through the district office when the Superintendent and dCOM feel the candidate has made sufficient discernment to move forward toward certification.
- The testing process (scheduling, assessment, analysis and follow-up interview) can take 3-4 months. *Mentors and candidates should plan accordingly.*
    - For example, Beginning Candidates should begin this process in the early Fall to have this completed by Local Pastor Licensing School in the Spring.
- In addition to time management, a mentor can play a vital role during this step by ensuring the candidate understands the nature of this analysis. The assessment is designed to gain insight and understanding of the candidate's personality, skill-sets and overall mental and emotional health. A mentor should encourage candidates to answer all questions faithfully and truthfully so the most accurate results can be attained. *Candidates who try to "get a good score" will create inconclusive results and the tests may have to be administered again at a later date.*

Section III - Initial Meeting with a Newly Assigned Mentee

Meeting Setting

Meetings with a mentee can be either on Zoom, Facetime or in-person. While the content of your meeting should be held in confidence, meeting in public spaces, like a coffee shop, is appropriate if it is also agreeable to the mentee.

Initial Meeting Content

In an initial meeting, encourage the candidate to share their call story as they understand it now. Give them space to talk about their background, including family, education, relationship with the church, and their connection with God. Take a moment to briefly share your own call story and current ministry setting. This initial conversation should not be rushed. Use open-ended questions to invite deeper sharing from the candidate.

The following items should be done at the first meeting with a new mentee:

1. **Explain the idea of a "Candidate Driven Process"**
   Candidacy is designed to let candidates set their own pace, including how often they meet with their mentor and the speed at which they progress through the process. Candidates are expected to take the initiative in scheduling meetings with their mentor and to stay aware of their tasks, working diligently to complete them. This approach emphasizes grace rather than hazing. While candidates carry responsibility, this does not mean mentors take a passive role or adopt a judgemental or gatekeeping attitude. Mentors are allies in the process and should act in the candidate's best interest.
2. **Review and Sign the Mentor/Mentee Covenant (see Appendix B)**
3. **Ensure the Mentee has the following**
   a. *Answering the Call* by Meg Lassait
   b. *The Christian as Minister* by Meg Lassait
   c. The most recent edition of the *Book of Discipline*
4. **Review "Steps Into Ministry" Checklist together to determine the candidate's current progress in the process.**
   a. What steps have been completed?
   b. What next steps does the candidate wish to pursue?
   c. Have they spoken with their pastor?
   d. Do they know who the SPRC chairperson is for their church?

Section IV - Ongoing Candidacy Mentor Expectations

Meeting frequency:
Meetings should happen at least monthly but if the candidate wishes and the mentor is agreeable, meetings can happen more regularly. *Note: If you have more than one mentee, you can meet as a group following the initial meeting.*

Candidacy Guidebook - *Answering the Call*
Between meetings, both mentor and candidate will read portions of the book at an agreed upon pace. The guidebook will be a vital resource to help explore the candidate's call to ministry and what that may look like for him or her in various ministry setting options. Additionally the book will aid the mentor leading discussions related to the realities of ministry including impact on family, itinerancy, and other social, financial, emotional, and spiritual impacts of ministry.

Mentoring in area of ministries as well as candidacy process:
The Candidacy Mentor can play a vital role if the candidate is already serving a church as a DS Hire or Lay Supply. The Candidacy Mentor should offer wisdom and advice to assist the candidate as well as offer assistance in understanding church polity.

Annual Written Report
The dCOM may require written reports on a regular basis that explains the mentor's evaluation of the candidate and their progress.

Section V - dCOM Certification Interview

***Candidates may only request an interview for certification once you and your candidate have completed the guidebook and completed all necessary steps in "Steps Into Ministry" Checklist. This includes the psychological testing process.*

Candidacy Mentor Report Form:
Once the candidate has requested an interview, the Candidacy Mentor will submit a Candidacy Mentor Report Form. to the dCOM chair. The mentor will submit it to the dCOM chair prior to the certification interview. You and the candidate will discuss your report before you submit it. It is important to be specific and honest in this report.

> ***If a mentor has concerns or reservations about the candidate assigned to them, it is important that they discuss them with the candidate as they arise. Don't let it be a surprise to them when you fill out the mentor report.*

The candidate will sign that they have read the report (their signature acknowledges that the candidate has seen it, not necessarily that they agree with the evaluation).

Mentor's role during and after the Certification Interview:
The Candidacy Mentor will attend the interview as a silent, prayerful presence supporting their mentee. Mentors are also said to be "a second set of ears" meaning that they listen to what is said to the candidate and can help the candidate remember and interpret the interview in the future.

Interview Results:
There are three possible outcomes of the Certification Interview. *Colloquially, we say the candidate will either be told "Yes," "Not Yet," or "No."*

- "Yes" indicates a candidate has met the requirements and has received approval for Certification by the dCOM.
- A candidate may receive a "Not Yet" response if there are issues that can be addressed over time, such as spiritual or emotional maturity, the ability to articulate their call to ministry, understanding of Methodist doctrine and polity, or other factors. Once these issues are resolved, the candidate is eligible to apply for Certified Candidacy in a future year.
- If the answer is "No" it means that the candidate's process has come to an end. They may not apply for Certification in any subsequent year.
    - This response may come after multiple instances of receiving a "Not Yet" answer, where concerns have not been addressed. Several factors could contribute to this, such as the candidate having significant disagreements with the UMC, like opposing infant baptism.
    - Other concerns may include emotional instability, which could make the candidate unsuitable for church leadership. Additionally, family dynamics could hinder certification - for example, if a candidate says, "My spouse isn't supportive, so I'll get a divorce to become a pastor."

Following the interview, regardless of the results, the mentor will debrief with the candidate to evaluate how the interview went and help the candidate process the results and feedback from the interview.

Section VI - Clergy Mentor for Certified Candidate Status

(From *Certified Candidacy status* to *Commissioned* status or *Course of Study* completion)

Changing Mentors After Certification:

- Candidates will continue their process with a *Clergy Mentor* who may or may not be the same person as their *Candidacy Mentor*. These decisions are made by the dCOM and the DS.
- If the candidate is attending Seminary but not serving an appointment, their Candidacy Mentor will remain their mentor until they receive an appointment.

Deacon Track Certified Candidates:

- Deacon track candidates who are Certified Candidates may be appointed to a ministry setting, by the bishop, once they have completed at least half of their Seminary credits.

Preaching License Eligibility and Licence Local Pastor Status:

- A Certified Candidate can receive a preaching license *only* while under appointment to a local church setting.
- A Certified Candidate is eligible for a preaching license upon *either* completing one-third of the credits for a Master of Divinity (M.Div.) at an approved seminary *or* completing Licensed Local Pastor School.
- Once a Certified Candidate is appointed to a ministry setting, the Candidacy Mentor's role is complete and a Clergy Mentor will be assigned. The Clergy Mentor will continue with this candidate until Course of Study has been completed.

Initial meeting with a Certified Candidate as Clergy Mentor:

The initial meeting between a new Clergy Mentor and mentee should focus on sharing call stories, discussing their current understanding of the call to a specific ministry (Elder, LLP, Deacon, etc.), and getting to know each other's family and work backgrounds. This meeting will also include a review and signing of the Mentor/Mentee Covenant (Appendix B).

Different approaches for Clergy Mentors vs Candidacy Mentors:

- While *Candidacy Mentors* focus on broad discernment and exploration of call, a *Clergy Mentor* focuses on the *practical*, *spiritual* and *theological* **practice** of ministry itself.
- Clergy Mentors identify and aid in the development of healthy habits in ministry as well as in personal life for the candidate.
- A Clergy Mentor maintains *complete confidentiality* in all areas of mentoring, (except in mandated reporting situations of abuse, or the presence of a threat of violence). An annual report to the dCOM or BOM will only describe topics covered during meetings, dates and times of meetings and an indication that the mentee is faithfully participating in the meetings. No specific details will be shared beyond that. This is to enable open and honest sharing with the mentor without fear of judgement.

Differences between Mentoring LLPs and Provisional-track Candidates:

The mentoring approach for *Licensed Local Pastors* and *Provisional Candidates* is relatively similar. The major difference between the two, is that a mentor for Provisional Candidates must be a Full Member (Elder or Deacon).

Mentors of Provisional Members will also participate in the required *Resident In Ministry* program set by the Board of Ordained Ministry. A Provisional Member Handbook will be provided by BOM.

Other key instructions for mentoring at the Certified Candidate level (and beyond):

1. **Mentoring should be spiritually grounded** (as ministry should be spiritually grounded). Questions such as "How is it with your soul?" and "How is it with your ministry?" should be asked frequently. Mentors should model and encourage spiritual disciplines.

2. **Encourage the candidate to talk about what they are learning.** All local pastors whether pursuing Course of Study or Seminary classes – will be encountering new material and ideas. Talk about assignments and different understandings: "What is challenging to you?" "Has this changed your understanding of the subject?" "What is new for you?"

3. **Encourage candidates to verbalize their theology and explore its practical application.** Questions like, *"How would you explain United Methodist baptism in a new member's class?" "How would you teach a confirmation class about Holy Communion?" "How does a Christian respond to racism?"* strikes at the core of development desired at this stage. Asking questions like, *"How is your call being affirmed?" "How is your family adapting to your ministry and does that change your sense of call?" "Has your call changed?"* are also vitally important work to think through with a mentor prior to meeting with BOM or dCOM.

4. **Mentor the candidate as they encounter difficult situations in ministry.** If there is an upcoming meeting or event that is likely to be a challenge, mentors can assist in deciding on the best approach. The mentor can ask appropriate questions like *"What might you say if ____ happens?" "How do you think you will introduce this topic?" "Who should be present?" "What might the reaction be if you say that?"*

   After a difficult meeting or conversation, a mentor can help the candidate debrief: *"What did you say or do that was helpful?" "What would you do differently?" "What follow up needs to happen?"* are good types of questions to guide the candidate to their own understanding. It may also be appropriate to encourage the candidate to share certain information with the superintendent if necessary.

   Be a sounding board for the frustrations that often occur in ministry. Sometimes a person simply needs to vent. Help put the frustrations into perspective by asking good questions. *"What do you think your role is in this situation" "How are you showing God's grace?" "What will happen if you do nothing?" "What will happen if you do something?"*

5. **Look for ways to help the candidate grow their skills in ministry**: share resources, good books, and ideas for ministry. When there is opportunity, observe as they lead worship and preach, offer suggestions to each other, read and discuss a book together, encourage creativity and open conversation with ministry teams and the Staff Parish Relations Committee.

6. **Direct the candidate towards connection:** district or conference events, cluster meetings, lectionary groups, prayer partners or other accountability groups.

7. **Mentors should model a healthy work ethic along with good self-care.** It's important to have time off, particularly for bi-vocational pastors. It is necessary to balance job, church, family, and personal time.

Other Things to be Aware of:

- Candidates are Certified and will choose to pursue either Seminary, Commissioning or will begin Course of Study as a Licensed Local Pastor.
- Candidates may only remain at the Certified Candidate level for 12 years at maximum.
    - If a candidate has not either completed Course of Study or has been Commissioned by the end of 12 years, the candidacy is discontinued from the process and must begin again.
- UNY Conference's requirements to be eligible for commissioning and ordination respectively
- A candidate must be certified to qualify for UNY Conference's Student Aid Fund service grants/loans while in college or seminary.
- Candidates for Commissioning must be Certified for at least one year before applying for Commissioning.

Section VII - Local Pastors and Course of Study (additional notes)

Newly Licenced Local Pastors and Course of Study:

All Licensed Local Pastors who are taking Course of Study must be assigned a Clergy Mentor. These Clergy Mentors may be full members, Associate Members, or Licenced Local Pastors who have completed Course of Study or Seminary. When Course of Study is complete, a mentor is no longer required by *The Discipline*. **However, a District Superintendent or dCOM may require a mentor if they feel continued guidance in specific areas is warranted.

Licensed Local Pastor meeting frequency:

It is *strongly recommended* that a Licensed Local Pastor serving in ministry for the first time meet with their mentor on a monthly basis. This is particularly helpful in assisting the new LLP with Charge Conference preparation, worship planning, entering vital signs, working with church committees, and end of year statistical reports.

> (Some new LLPs may have served as laity as district hires for pulpit supply for a year or more and may not need to meet monthly despite their change in status. If a transition like this has occurred, take time to clarify the differences, privileges and responsibilities of LLPs vs lay supply.)

Course of Study, minimum annual requirements:

Once licensed, a new LLP has a "grace year" before being *required* to begin Course of Study classes. The mentor can point the local pastor to GBHEM for information about regional, residential, hybrid and online options for classes. Full time LLPs are required to take 4 classes per year. Part-time LLPs are required to take 2 classes per year. If this standard cannot be met, a request for an exception must be submitted and ***must be approved*** by dCOM.

After Course of Study is completed:

- Once Course of Study is complete, a Clergy Mentor is no longer needed.
- In some cases, when candidates finish Course of Study, they may feel called to pursue further education in *Seminary* or *Advanced Course of Study* and go on to pursue Provisional Member status. When Course of Study is nearing completion, it is a good time to review this option with a candidate. Mentors can find information about this on the "Steps Into Ministry" Checklist.

Licensed Local Pastors and Seminary Study:
An LLP is not expected to engage in Course of Study if actively participating in a seminary program.

Section VIII - Candidates Pursuing Provisional Membership (mentoring prior to the Commissioning interview)

PASSAGE system:
PASSAGE is the name of the GBHEM program for tracking candidates through the process toward licensing or ordination. For those who have served as candidacy mentors previously, Passage has replaced UMCARES.

Once you have completed the Candidacy Mentor training, you will be entered into the Passage system as an Advisor. When you are assigned to a candidate, that candidate will then register, and you will receive an email to "sign" electronically. You will then be able to go into Passage and monitor that candidate's progress.

Requirements to Apply For Provisional Membership

1. A candidate must hold a Certified Candidate status for more than 1 year.
2. A candidate must be approved by their dCOM to apply. The dCOM typically conducts an interview in the Fall to assess the candidate's readiness including samples of written work and oral examination. (*Candidates should inform their dCOM chair of their intention to apply for Commissioning as early as possible.*)
3. A candidate, once approved by dCOM, must submit Form 105 to the BOM registrar.
4. A candidate must complete the required educational requirements (described below).

Age and Ordination:

Our United Methodist *Book of Discipline* specifies mandatory retirement for clergy at 72 years of age. Therefore, *candidates cannot be ordained if they are 72 years of age or older*. As a mentor, you may play a key role in helping candidates understand these limits in light of the time required to earn a master's degree and complete the full ordination process. Other avenues for ministry, such as LLP status, may be beneficial to recommend.

Educational requirements for Provisional Membership in Order of Elder/Deacon:

- All requirements for Provisional status are the same as full membership (see below) except:
    - A candidate may apply for Commissioning if at least ½ of their master's level course work has been completed ***and*** the candidate has completed ***all*** of their UMC specific courses (Polity, History, and Doctrine) ***prior*** to the interview.
        - Note that some seminaries will combine 2 of these such topics into one course like a "UMC History and Doctrine" course.

**If a Licensed Local Pastor (LLP) has completed the Advanced Course of Study and holds a bachelor's degree, they are also eligible to apply for Provisional Status and Ordination.

Educational requirements for Full Membership in Order of Elder/Deacon:

- **Deacon Candidates** have three possible routes for eligibility:
    1. A candidate will have completed a bachelor's degree, Masters of Divinity (or other Master's level theology degree). The master's degree must be earned from a school approved by the UMC University Senate.
    2. A candidate will have completed a bachelor's degree, a master's degree in an appropriate area of their ministry specialization, and Basic Graduate Theological Studies from a school approved by the UMC University Senate.
    3. Begin candidacy at age 35 or older, completed a bachelor's degree, Professional or ministry certification (church or secular professional certification in an area of ministry, including a minimum of eight semester hours of graduate academic credit), and Basic Graduate Theological Studies from a school approved by the UMC University Senate.

** All candidates must complete master's level courses in UMC Polity, Doctrine and History.

- **Elder Candidates** must have a Master of Divinity (M.Div.) degree from a seminary approved by the UMC University Senate and completed courses including:
    - Old Testament
    - New Testament
    - Theology
    - Church History
    - Mission of the Church in the World
    - Evangelism
    - Worship/Liturgy
    - United Methodist Doctrine,
    - United Methodist Polity
    - United Methodist History

Mentor Requirements for Provisional-tract Candidates:

- All LLPs pursuing Provisional Membership who are attending college or seminary must be assigned a Clergy Mentor.
- Some LLPs may not have a mentor if they have been serving in that role for several years. In this case, a mentor will be assigned when the LLP indicates their intent to apply for commissioning to the dCOM.
- All Provisional Members must be assigned a Clergy Mentor who is a Full Member.

Mentoring a candidate seeking Provisional Membership
(*for more information on written work, see Appendix C*)

- **Reviewing Paperwork**:
  When mentoring a candidate seeking provisional membership, it is essential to thoroughly review all paperwork they are submitting to the Board of Ordained Ministry (BOM).

- **Providing Feedback**:
  You are encouraged to review portions of their paperwork as they are completed. Providing constructive feedback is a key part of the mentoring process. Your feedback should include:

    - General observations and advice.
    - Guidance on how to improve their work.
        - **Important Note**: You are NOT expected to edit or rewrite their work—this would be inappropriate. Instead, focus on identifying strengths and weaknesses, and guide them on how to develop further.
        - If their answers are unclear, challenge them to clarify their work.
        - If their theology is underdeveloped, guide them on the areas that need improvement.
        - Help them present the best possible version of their written work. For example, a candidate may benefit from hiring a copy editor or another to proofread the work.

- **Theological Review**:
  In written work, as well as conversation, it is also important to review a candidate's theology to ensure it aligns with the teachings of the United Methodist Church.
  A qualified candidate should:

    - Be able to articulate traditional doctrines of the church in areas including:
        - Resurrection
        - Regeneration
        - Christology
        - Trinitarian Theology
        - Wesleyan understanding of grace
        - Means of Grace
        - Ecclesiology
        - Soteriology
        - Nature of sin and evil
    - Acknowledge any differences in their personal beliefs from the UMC tradition.
    - Clearly express how they intend to teach or communicate these theological beliefs

- **Important Deadlines**:
  The posted deadline for Commissioning and Ordination interviews is the final deadline. Ample time has been provided for each step, and no exceptions will be made, even in the case of illness, funerals, personal conflicts, or crises. This policy ensures fairness to all candidates and sets an expectation for candidates to be organized, dutiful, and avoid procrastination. Ensure your mentee understands this standard.

- **Inform Candidate If They Are Not Ready**:
  While the mentor does not have an official role in approving a candidate's readiness to apply for Provisional Membership (this responsibility lies with the dCOM), the mentor's role as a guide is crucial. *If you feel the candidate is not ready to apply due to lack of experience, underdeveloped theology, or other personal or leadership growth issues, it is important to communicate this to them personally.* While this feedback may feel discouraging, it's better for the candidate to wait a year or two than to risk harm or undue discouragement.

Note: Mentors will submit a letter of recommendation on behalf of their mentees to the BOM registrar prior to their Commissioning Interviews.

Section IX - Mentoring During and After Commissioning Interviews

BOM Interview:
Mentors are expected to attend the BOM interview with their mentee as a silent, prayerful presence, observing the process. Between interview sessions, mentors may offer calm support and help the candidate prepare for their next interview sessions. Afterward, mentors are uniquely positioned to debrief with the mentee about their experience and the interview's outcome, having witnessed the process firsthand.
(For more information on the interview process, see Appendix D.)

Approval Process:
The Board notifies candidates of their decision (Yes, Not Yet, or No) on the same day as the interview, however any details regarding that decision will come in a formal letter days later.

If a Candidate is Not Approved:
Candidates receiving a "not yet" will receive a letter with guidance outlining areas for growth, such as leadership, conflict resolution, pastoral care, or theological understanding (e.g., Soteriology, Christology, Justification). The Board may also require specific steps like Clinical Pastoral Education (CPE), coursework, or assigned readings. Mentors play a key role in helping candidates create and follow a plan for growth.

Mentoring During Provisional Membership:
Mentors of Provisional Members (Residents in Ministry) will receive a handbook with key dates and expectations. Review it carefully with the mentee.

- Meeting Frequency: Meet at least monthly (in person or remotely); conversations are confidential.

- Ongoing Expectations: The Commissioning Letter will outline growth areas similar to those named above. Mentors help guide development and ensure accountability for any required steps (e.g., CPE, courses, readings).

Letter to BOM Registrar:
When a Provisional Member applies for ordination, the mentor submits a letter to the BOM registrar documenting meeting dates with the mentee.

Section X - Supervising Clergy for Lay Supply

Laity Serving as Pastoral Leaders

Laity serving as pastoral leaders may fall into various categories:

- Beginning Candidates for Ministry
- Certified Lay Speakers
- Lay Servants
- Certified Lay Ministers
- Trained laypersons from other denominations
- In some cases, a member of a local church may volunteer to fulfill this role within their congregation without any formal training.

Lay Supply Service

- Individuals serving as Lay Supply who are not Certified Lay Ministers may only serve for up to one year.
- After one year, they must begin the process to become either a Certified Lay Minister or a Licensed Local Pastor.

Supervising Clergy for Lay Supply

Supervising Clergy are assigned to all District Hires, Lay Speakers, Lay Servants, and Certified Lay Ministers serving as pastoral leaders.

- Supervising Clergy must be one of the following:
    - Ordained Full Members
    - Commissioned Provisional Members
    - Associate Members
    - Licensed Local Pastors who have completed Course of Study or seminary
- Monthly supervisory meetings are the minimum expectation for this role.

Team Ministry Collaboration

Supervising Clergy work as part of a team ministry, which includes local church leadership.

- A covenant or written agreement must be in place, detailing roles, responsibilities, requirements, and compensation for each layperson assigned by the Superintendent.
- Note: Lay Supply are "*assigned"* to a congregation, not appointed.

Pastoral Coverage Responsibilities

The Supervising Clergy ensures pastoral coverage for:

- Baptisms (Can be any Full-member; not necessarily the Supervising Clergy)
- Holy Communion (Can be any Full-member; not necessarily the Supervising Clergy)
    - Laypersons may distribute Holy Communion, previously consecrated by an Elder or Deacon, during a worship service. (A formal order for distributing consecrated Holy Communion is available.)
- Weddings
- Funerals
- Reception of new members
- Confirmation

Unique facets of Lay Supply ministry
Supervising Clergy must understand the Certified Lay Minister (CLM) process, including their privileges, limitations, and ongoing requirements.

- **Supervising vs. Mentoring**
    - If the layperson is a Beginning Candidate for Ministry, they will have an assigned Candidacy Mentor. The Candidacy Mentor *may or may not* also be acting as their Supervising Mentor. In some cases these two roles are filled by the same person. In other cases they are two separate people.
    - The Supervising Clergy relationship formally ends when a person serving as Lay Supply transitions to being a Licensed Local Pastor. The LLP is then considered a Beginning Candidate. At that point, they will be assigned a Candidacy Mentor at the discretion of the dCOM and District Superintendent. In some cases, a Supervising Clergy may be asked to take on this Mentoring role, provided they have completed mentor training.

Supervising Clergy acts as an extension of the Superintendent:
- Information shared with the Supervising Clergy may be communicated to the Superintendent as necessary, maintaining confidentiality in all other relationships.
    - Supervising Clergy must not share non-public or unauthorized information with colleagues, church members, family, or others.

Evaluating and Guiding the Layperson:
The Supervising Clergy evaluates the layperson's performance, understanding they are not formally theologically trained.
- Guidance on sermons, worship, meetings, and other responsibilities should be constructive, aimed at building confidence and encouraging growth.
- Any concerns should be addressed collaboratively and communicated to the Superintendent or the Staff-Parish Relations Committee (SPRC).

Preparation for Administrative Responsibilities
The Supervising Clergy is responsible for guiding the layperson in preparing for:
- Charge Conference
- Nomination committees
- Vital signs reporting
- Year-end reports
  This may involve collaboration with other members of the ministry team.

Spiritual Life and Well-being
Supervising Clergy should prioritize the spiritual life and well-being of the layperson.
- They should model spiritual disciplines, healthy self-care, and ministry grounded in spirituality.

Consultation and Best Practices
The Supervising Clergy offers consultation and advice regarding situations in the charge being served.
- They share best practices as needed, at the invitation of the SPRC or District.

Section XI - Additional Notes

1. Considering ¶310.2. d where the candidate agrees to dedicate themselves to the highest ideals of the Christian life, any knowledge of a candidate not living in such a way should be discussed with the candidate. *If there is not a satisfactory response, it should be included in the mentor reports.*

2. *All mentors – candidacy or clergy – are mandated reporters* and as such must report suspicions of child abuse to Childline. Any threat to harm self or others must be reported to proper authorities by calling 911. Candidacy mentors will make a report with their observations of the candidate to the dCOM. The standard for candidacy is fitness for ministry.

3. It is not uncommon for a change of mentors due to itineracy or retirement. However, though technology, these relationships may be able to continue despite geographic distance. Increasingly, mentor relationships happen across district lines.

4. Because mentoring is an ongoing commitment, be discerning in your decision to take on a new mentee. *If you feel you cannot fully commit to this role in your season of ministry, please allow for another to fill this role.*

5. Remember that your role as mentor is different from that of pastor, friend or colleague. Sometimes having a prior relationship with a mentee can be challenging. If starting a new mentoring relationship, it is important that you hold yourself to the standard of a mentor. If you are finding it difficult, talk to your dCOM or BOM.

Appendix A - A Scriptural/Theological Basis for Mentoring.

Scripture offers many examples of mentoring relationships - Moses and Joshua, Elijah and Elisha, Naomi and Ruth, Barnabas and Paul, Paul and Timothy, and Jesus with Peter, James, and John. These stories show the value of walking alongside one another: offering guidance and encouragement, sharing wisdom, and holding each other accountable. Such relationships are essential for forming healthy leadership within congregations and the wider church.

Those called to church leadership enter into a sacred covenant of mutual accountability. Both mentor and mentee play vital roles in discerning and responding to God's call.

Mentors are companions, not judges. In the story of Samuel, for example, God is the one who calls, while Eli helps Samuel recognize and understand that call. In the same way, mentors are not responsible for determining who is called, but for nurturing discernment - helping individuals grow in clarity about what their unique calling means.

Appendix B - Mentor/Mentee Covenant

Overview:

Candidacy is a journey of spiritual discernment. The mentoring relationship is one of mutuality and support, designed to encourage and aid the candidate in their discernment journey. The candidacy process has many steps and various possible outcomes; yet at every step and no matter the outcome, the mentoring relationship will center on the growth of the candidate and prioritize the discovery and actualizing of God's specific call in their life.

A mentoring relationship involves two parties: the mentee (*the candidate*) and the mentor. It is important for both parties to recognize their unique and active roles in this process and the expectations present for each party. Because of the sacred nature of this journey, mentors and mentees will enter into a holy covenant that outlines the commitments of each person.

The mentee will covenant to:

1. Meet with their mentor once a month, digitally or in person.
2. Familiarize themselves with the candidacy process and expectations.
    - *The Mentor Handbook* - being readily available - outlines the various steps. The mentee is expected to learn from this resource or, if needed, learn from their mentors, district superintendents, District Committee On Ministry, or Board of Ordained Ministry.
3. Complete their own work:
    - Mentors are one resource among many that can help the candidate in their journey but the discernment journey is primarily the candidates to walk. Mentors will offer accountability, wisdom and guidance, but the mentee must complete each step of their journey of their own volition.
4. Be the first to make contact when assigned to a new mentor.

The mentor will covenant to:

1. Meet with their mentee once a month, digitally or in person.
2. Familiarize themselves with the candidacy process and expectations.
    - The handbook - being readily available - outlines the various steps. The mentor is expected to learn from this resource or, if needed, learn from District Superintendents, District Committee On Ministry, or Board of Ordained Ministry..
3. Be a supportive resource, maintaining awareness of steps completed by the candidate.
4. Be aware of, and ensure the mentee is aware of, upcoming deadlines.
5. Read and give feedback on portions of the mentee's written work.
6. Pray for the mentee on their journey and offer spiritual support throughout the process.
7. Commit to being available to the mentee, returning emails and phone calls in a timely manner.

Signed: _____(Mentee) _____(Mentor)

Appendix C - BOM Expectations for Written and Submitted Work

A Standard of Excellence:
Beyond the significance of guaranteed appointment and lifetime credentialing, the BOM maintains high standards to ensure fairness and proper evaluation. Candidates are encouraged to "give your best work" so that what is submitted is an accurate representation of their abilities.

Work that does not reflect a candidate's best effort will not be given the benefit of the doubt or "graded on a curve." Likewise, personal testimonies or prior knowledge from individual BOM members are not considered in deliberations. This approach ensures equity among all candidates, with evaluation based solely on the work presented.

Citation Standards for all Written Work:
All written work should include *in-text* citations for theological ideas and scripture references. Including a strong and diverse bibliography helps show ability to the Board and helps us to understand a candidate's beliefs.

What Makes an Effective Answer?:

In a strong written response, a candidate will:

1. Articulate their own theological understanding, efficiently and clearly.
2. Locate their own belief within the UMC tradition.
3. Explain how they intend to teach (or have already taught) this concept in their ministry setting.

Some helpful hints:

1. Balance the academic citation style with personal voice and experience.
2. Telling stories from life or ministry that illustrate the concept being explored can be an effective way to both explain the idea and bring one's own personal story or sense of call to the forefront.

What is the Mentor's role:
(*See Section VIII for more information*)

Candidates are not required to share their written work with their mentor, but it is highly beneficial.

A helpful approach is for candidates to compose one written response to a question for each monthly meeting. This gives the mentor an opportunity to offer direct feedback, helps the candidate understand the expected writing standard, and supports effective time management.

Appendix D - Commissioning/Ordination Interview Format

Schedule of Events:

1. **Candidates will submit paperwork and other required submissions to BOM**
2. **BOM members will review all materials submitted prior to the interview**
3. **BOM will conduct an oral exam of the candidates, based largely on their written and submitted work**
4. **BOM members will deliberate based on the totality of the written and oral examinations**
5. **BOM members will vote to approve recommending a candidate for Ordination or Provisional Membership by a vote of at least ¾**
6. **The results of the deliberation will be shared with the candidate verbally and later in writing**
7. **If recommended, an official vote will be taken at Clergy Session to Commission or Ordain**
8. **Candidates will be Commissioned or Ordained by the Bishop at the service of Commissioning and Ordination**

Interview Format:
Interviews will be conducted by a selection of BOM members. Each candidate will meet with 2 separate interview groups under the topics:

1. ***Theological Framework for Ministry*** focuses on topics including Doctrine, Approach to Scripture, Wesleyan Theology, Exegesis, Sacraments, Atonement, Christology, Ecclesiology, Soteriology and Missiology.

2. ***Spiritual and Community Life*** focuses on EQ, Spiritual Disciplines, Conflict Management, Wellness, Leadership Style, Call to Ministry, Interpersonal Skills, Connectionalism/Polity, Gifts for Ministry, Growing Edges, Role of Ordained Clergy, and Support System.

Each interview consists of two parts: a 45-minute interview followed by a 15-minute follow-up with a 15-minute break in between. This format allows time for reflection and response, giving both the interviewer and the candidate an opportunity to clarify, expand, and go deeper.

INDIVIDUAL INTERVIEW FORMAT	
15min	Interview Team Final Prep
45min	**Initial interview**
15min	Break & Review
15min	**Follow-up**
15min	Interview Team Final Review

15 Minute Break and Review:
Between interview segments, mentors will meet privately with their mentees to review, evaluate, and strategize based on the conversation so far. Mentors are encouraged to help candidates think through their responses and offer perspective. You may remind your mentee of relevant experiences from their ministry or encourage them to lean into their strengths, which you know well. *Above all, remain a calm, steady presence and seek to instill confidence in your mentee, who may be under significant stress.*

Differences between Commissioning and Ordination Interviews:
(Submission requirements may change from year to year, so be sure to review current standards.)

Currently the format of Commissioning and Ordination interviews are the same. The primary difference between the two interviews lies in what each is designed to evaluate.

Commissioning focuses on a candidate's "Readiness"

Readiness refers to a candidate's perceived capacity to live out the calling of an Ordained Deacon or Ordained Elder. This includes their demonstrated skills, theological and vocational understanding, self-awareness, and familiarity with UMC polity, as well as clarity about their unique call to a particular order.

A common mistake is to equate the work of a Licensed Local Pastor with that of an Elder, or the work of a nonprofit professional with that of a Deacon. For example, someone may already be an accomplished Licensed Local Pastor or Social Worker prior to interviews, but readiness for membership in an ordained order is something distinct. Candidates should be prepared to articulate these differences and clearly describe how their ministry will change upon ordination.

Ordination focuses on a candidate's "Effectiveness"

The *Effectiveness* standard measures a candidate's demonstrated ability to bear good fruit in the ministry of an Ordained Deacon or Elder. Once commissioned, candidates take on the responsibilities of their order, even though they are not yet fully ordained. During this period, they live out their calling within an appointed ministry context. Ordination interviews, then, serve as a time to assess how that ministry is taking shape - evaluating the candidate's effectiveness in living out their call.

While written and interview questions for Commissioning tend to focus on the abstract (e.g., "What is your understanding of the Holy Spirit's work in regeneration?" or "How would you explain Holy Communion to a confirmation class?"), Ordination questions center on the lived reality of recent ministry (e.g., "Tell us about a time you witnessed spiritual regeneration in your ministry," or "You wrote about your work with your confirmation class this past year - what was the most difficult concept to teach, and how did you overcome that challenge?"). This does not mean that questions of theory or understanding may not be asked, but the overall focus at Ordination interviews remains *effectiveness*.