



The Board of Ordained Ministry

NEW ENGLAND CONFERENCE
THE UNITED METHODIST CHURCH

www.neumc.org/boom

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REGISTRAR

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Important Dates:

Due June 16, 2011 - 1) *Application for Clergy Relationship*,
2) *Personal and Professional Information Sheet*
3) *Photo (may use one already on file if recent)*

Due Sept. 1, 2011 - *all checklist materials*

Oct. 20 or 21, 2011 – *full membership examinations with the Board of Ordained Ministry*

Dear Applicant:

Enclosed please find the materials necessary for you to begin the application process for **Full Membership in the Order of Elder** in the New England Conference of the United Methodist Church. You should find the following items in this packet:

1. A Checklist of Requirements (pages 3-4). This will give you further details on all of the materials that are necessary for submission.
2. An Application for Clergy Relationship (page 5)
3. A Personal and Professional Information Sheet (pages 6-7)
4. A Medical Report Form (pages 8-9)
5. Confidential Lay/Clergy Reference Forms (you will need 5 copies of the lay form (pages 10-11), and 2 copies of the clergy form, pages 12-13)
6. A Policy for the Candidacy Examination Process (page 14-17)
7. Guidelines for the Examination Process (pages 18-26)

(The above forms and documents can also be found at <http://www.neumc.org/pages/detail/237>.)

Checklist: for your information and reference only. Do not return it to me.

The Application for Clergy Relationship, Personal and Professional Information Sheet, and a non-returnable current photo must be returned to me by **June 16, 2011**. This constitutes your application and your intent to produce the remaining necessary materials for an examination with the Board of Ordained Ministry on **October 20 or 21, 2011** at Rolling Ridge Conference Center, N. Andover, MA.

- Options for completing the Application for Clergy Relationship and Personal and Professional Information Sheet:
 - 1) the enclosed paper forms, or
 - 2) electronically (Word documents found at <http://www.neumc.org/pages/detail/237>), or
 - 3) on the Pathways to Ministry website (see below).

- The photograph should be recent, focused on your face (not taken from a distance), and labeled with your name. The size should be between 3 x 3 and 5 x 7 and will not be returned. The photograph may also be submitted digitally to SsEvns@aol.com. The photograph will be displayed for the Board's use at the time of your exam, and may be submitted to the Conference for use at ordination.

Medical Report Form: needs your attention as well as that of your physician. A Medical Report form based on a physical exam completed within the last 2 years must be in your file.

Confidential Lay/Clergy Reference Forms: these are to be mailed to the individuals you select, according to the categories listed on the checklist (#8a-g), after you have filled out the top portion down to the asterisks. Be sure to mail me a list of the names and addresses to whom you have sent these forms.

Submitting materials:

A. The **worship service videos** are posted to a non-public page on the Conference website for the Board members to view. Videos should be filmed in NTSC-Standard format, 720 x 480; and submitted in 1 of the following 3 formats (listed in order of preference):

- DVD - **unedited**, in NTSC-Standard (do not add chapters, titles, or do any other editing)
- AVI file on CD or jump drive - full size 720 x 480
- WMV file on CD or jump drive - 480 x 320 (ideal) or 320 x 240 acceptable

Mail or deliver DVD or CD to:

Ms. Alexx Wood
 Director of Communications
 New England Conference UMC
 PO Box 249
 276 Essex Street
 Lawrence, MA 01842-0449

The deadline for Alexx to receive your video is September 1.

If you have questions for Alexx, you can reach her at **communicate@neumc.org**, or (978) 682-7676 x 150.

B. The **documents** (checklist items # 10, 11, 13, 14, 15, 16, 17, and 18) are to be:

- 1) emailed to me at **SsEvns@aol.com**, as **Word** or **pdf** files. The documents should be double-spaced, using size 12 font. Your name should appear in the header of all the pages.
- 2) Two (2) paper copies of each of the items listed above should also be mailed to me (PO Box 709, Londonderry, NH 03053). It is acceptable to use both sides of the page when printing, saving paper and mailing weight.

All completed checklist materials must be received by September 1, 2011.

Pathways to Ministry:

Pathways to Ministry (<https://pathwaystoministry.com>) is a candidacy management software system which I will be using to confirm receipt of your materials. **Please contact me in order to receive an email invitation to register.** Once registered, you will be able to see the list of requirements, and I will be "checking off" these requirements as I receive them (they will appear "grayed-out"). You will be able to log back in at your convenience to see what has been received, and what is still outstanding. The Application form and the Personal/Professional Info Sheet can also be completed at this website. Blank forms (medical report, psych assessment request, and reference forms) are available to print or download at the associated step. Please don't hesitate to contact me with questions on using Pathways.

I will keep you informed as I receive the checklist items, either through Pathways or by email. Please do not hesitate to contact me with any questions or concerns. I look forward to working with you as you prepare for this important step in your life's journey.

Susan Evans, Registrar
 Board of Ordained Ministry

Checklist of Requirements for Full Membership in The Order of Elder
New England Conference of The United Methodist Church
Board of Ordained Ministry

Examination to be held October 20 or 21, 2011 at Rolling Ridge Conference Center, N. Andover, MA

Please use this page as a checklist for yourself – do not return it to the registrar. You are responsible for ensuring that all of the material reaches the registrar by the dates listed.

The following specific requirements must be met in order for election to full membership and ordination as an elder. In addition, for the ordination examination, all applicants are expected to be familiar with all materials in paragraphs 332-336 in the **2008 Discipline**.

APPLICATION FOR FULL MEMBERSHIP MUST BE RECEIVED BY THE REGISTRAR ON OR BEFORE June 16, 2011. The return of the following items constitutes your official application: (a) the Application for Clergy Relationship, (b) the Personal and Professional Information Sheet, and (c) a current photograph, between 3x3 and 5x7 (non-returnable). All this is to be mailed to Susan Evans, Registrar, PO Box 709, Londonderry, NH 03053-0709, or emailed to SsEvns@aol.com.

THE FOLLOWING MATERIALS MUST BE RECEIVED BY THE REGISTRAR BY SEPT. 1, 2011:

_____1. **College transcript** (official) indicating a Bachelor of Arts degree or its equivalent as indicated in ¶335(3)(a) {should include Cumulative Grade Point Average; if not, request the registrar of the College to send this information also.} (1 copy)

_____2. **Seminary transcript** (official) indicating completion of M. Div. or equivalent as indicated in ¶335(3)(b) {should include Cumulative Grade Point Average; if not, request the registrar of the Seminary to send this information also.} (1 copy)

_____3. Evidence of courses completed in **evangelism** and **United Methodist history, doctrine, and polity** as indicated in ¶335(3)(d) {If not clearly indicated on your transcript request the registrar of the Seminary to verify this information – this pertains particularly to persons who took these classes through a consortium, such as the Boston Theological Institute, and whose transcripts indicate only a BTI course rather than a course title.}

_____4. (*For those commissioned in 2006 or later*): Evidence of separate course completed in **mission** of the church in the world {If not clearly indicated on your transcript request the registrar of the Seminary to verify this information – this pertains particularly to persons who took these classes through a consortium, such as the Boston Theological Institute, and whose transcripts indicate only a BTI course rather than a course title.}

_____5. (*For those commissioned in 2005 or later*): Evidence of completion of at least 1 unit of **CPE - Clinical Pastoral Education**

_____6. **Medical Report** (your physician should use the enclosed United Methodist Church Form) as required in ¶335(4), if your medical report on file is older than 2 years **or if there has been a change in your medical history.**

_____7. Completed **Psychological Assessment** – If this battery of tests {MMPI, Strong Interest Inventory, Sentence Completion, Adjective Checklist & PDI} has already been completed within the last 7 years, it need not be repeated; however, a report of the results of this testing needs to be on file.

_____8. Seven **references**. (You complete the section of the form above the line of asterisks, including the signature on the release, and then send the form to the persons who will be providing the reference. **These people should return the reference form directly to the registrar,** (not to you) by **Sept. 1, 2011.**

- a. LAY reference: Chairperson of the SPRC (or a committee member designated by the committee) in the local church where you are serving.
- b. LAY reference: Lay Leader or a lay member of the congregation you serve.
- c. LAY reference: Chair of the Finance Committee
- d. LAY reference: Chair of the Education Committee

- e. LAY reference: Chair of Church Council
 - f. CLERGY reference: a United Methodist colleague with whom you have worked (NOT your mentor)
 - g. CLERGY reference: an ecumenical/interfaith colleague with whom you have worked.
- _____ 9. Letter indicating the names and addresses of the persons providing the references requested in number 8 above. **This needs to be sent to the registrar early in your application process so references can be identified as they arrive.**
- _____ 10. **Sermon** – in compliance with ¶335(5), a **manuscript or transcript** (an outline is not acceptable) of a sermon preached on **Romans, Chapter 8**, the lectionary gospel for July 10, 17, or 24, 2011. Prepare and preach the sermon as you normally would.
- _____ 11. A **bulletin** for the service in which the above sermon was preached. Please **include an annotation** of the bulletin indicating why you included the various components of the service of worship and why you structured it the way you did.
- _____ 12. **Video of the entire service** in which the above sermon was preached.
- _____ 13. Complete and up-to-date **THEOLOGICAL Autobiographical Statement** as described in ¶324.13 with a maximum length of 5 pages, the first page of which includes a photocopy of a recent photograph of you. Describe your *conversion* as distinct from your *call* to ordained ministry.
- _____ 14. A **lesson plan and outline for teaching a book or books of the Bible** as indicated in ¶335(6). You must have **designed and taught** this study. It is not to be a previously published curriculum you simply taught. Include an **evaluation process**, to be completed by the participants, as part of the study.
- a. An overall **outline** of the teaching of an entire book of the Bible to lay persons in the local church setting. How many sessions? What are the overall goals and objectives? What material will be covered in each session?
 - b. A detailed **lesson plan** for one session of this course. How will the material be presented? What additional resources will be used?
 - c. A **summary of the participants' evaluations** of the Bible Study.
Maximum length: 8 pages for a., b., and c. combined.
- _____ 15. Paper on **“Code of Professional Ethics”** – based on your experience in the ordained ministry, what is your understanding of an appropriate “Code of Professional Ethics” that would apply to our clergy covenant? (that is, parish ethics/collegial ethics/personal ethics etc.) 5 page maximum.
- _____ 16. A statement for **doctrinal examination** – answering all questions in ¶335(7). Maximum length: 12 pages. You will be expected to support your positions biblically and in reference to the Wesleyan theological perspective (see Part II of the Discipline) both in your writing and during the examination. In addition please include a **one-page section on stewardship and missiology**.
- _____ 17. **Chart** of statistical figures from the years of provisional membership as recorded in the Conference Journals representing church membership & attendance, number of baptisms, Church School membership & attendance (children and adults), and percentage of mission shares paid. Also, prepare a **reflective narrative** on how this data demonstrates your ministry as transformational, using the following questions as guidelines: 1) In what way does the statistical data reflect your ability to administer effectively the work of the church, and to develop ways of working collaboratively with people? 2) Are you working across ethnic and racial lines to reveal the full nature of the Church of Jesus Christ?
- _____ 18. A one to two page **case study** which deals with an event, experience, or opportunity where you have personally facilitated transformational ministry.

IN ADDITION

Be prepared to talk about 2 instances where you practiced your ethical standard and about 2 instances where you used the Wesleyan quadrilateral in a decision making process.

Detailed instructions for submitting materials are listed in the opening letter.

***Application for Clergy Relationship to the New England Conference
The United Methodist Church***

Date: _____

Name: _____

Street Address: _____

City, State, Zip: _____

Home Phone: _____ Office or Cell Phone: _____

Email Address: _____

Being fully persuaded that God has called me to be a minister of the Gospel of Jesus Christ, I hereby request affirmation of that call by The United Methodist Church through the granting of clergy relationship to the annual conference. The relationship for which I am applying is:

_____ Associate Membership

_____ Provisional Membership/Commissioning in the Order of Elder

_____ Provisional Membership/Commissioning in the Order of Deacon

_____ Full Membership/Ordination in the Order of Elder

_____ Full Membership/Ordination in the Order of Deacon

_____ *Transfer candidates*: Provisional Membership in the Order of Elder and Recognition of orders granted by another denomination

_____ *Transfer candidates*: Full Membership in the Order of Elder

Personal and Professional Information Sheet
New England Conference of The United Methodist Church
Board of Ordained Ministry

Full legal name: _____ Date _____

I prefer to be called: _____

Gender: ___ Male ___ Female

Ethnic Group with which I identify myself: _____

Date of Birth (mo/day/yr): _____

Country of Citizenship _____

Marital Status: _____ Never married
_____ Married Date of current marriage: _____

Spouse's full name: _____

_____ Separated Date of separation: _____

_____ Divorced Date of divorce(s): _____

_____ Widowed Date of Spouse's death: _____

_____ Remarried Date(s) of previous marriages: _____

Children: List full names of all children and their dates of birth

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Education: (please list schools and their locations)

High School: _____ Year Graduated: _____

College: _____ Degree: _____ Year Grad.: _____

Area of Major: _____

Graduate School: _____ Degree: _____ Year Grad.: _____

Area of Major: _____

Seminary: _____ Degree: _____ Year Grad.: _____

Area of Major: _____

Other significant education: _____

Area of Major: _____

Church Background (please complete all information and give dates):

Church in which you were baptized _____ infant/child ___ youth ___ adult ___

Current Denominational Affiliation: _____

Local Church in which membership is/was held: _____

Date when you joined that local church: _____

Charge Conference which recommended you for ministry: _____

_____ Date of recommendation: _____

Local congregation in which early formative years were spent: _____

Field Education served (name, location and dates): _____

District and Candidacy Information:

District Committee which granted candidacy certification: _____

Date granted: _____

District Committee which recommended you for provisional membership: _____

Date recommended: _____

Date licensed as a local pastor (if applicable): _____

If serving under appointment now - name of church & location _____

District _____

Have you previously applied for clergy relationship **in this or any other annual conference of the United Methodist Church?** (Other than applying for and being granted Provisional (Probationary) Membership in the past if you are now asking for Full Membership) Yes No

If yes, which conference(s): _____

When was application made? _____

What action was taken? _____

If more than one application has been made, report this information for all applications. Use extra paper if necessary.

Have you ever applied for orders and/or membership **in any other denomination?**

Yes No

If yes, which denomination(s): _____

When was application made? _____

What action was taken? _____

If more than one application has been made, report this information for all applications. Use extra paper if necessary.

Please list your previous work history below.

All of the above information is complete and truthful to the best of my knowledge, with no intentional omissions.

Signature of applicant: _____

Date: _____

Medical Report Form
New England Conference of The United Methodist Church
Board of Ordained Ministry

To the Physician:

1. Ordained ministry often requires 60 hours or more of work per week. Segments of this work are potentially emotionally stressful. Are there any indications that this person would be unable to do such work? If so, please indicate them on this form, or use an additional page if needed.

2. Please return this form to: Susan Evans, Registrar
PO Box 709
Londonderry, NH 03053-0709

Part 1: Medical History Report
(To be completed by the individual before giving form to physician)

Name: _____ Date of Birth: _____

Address: _____

Marital Status: _____ Number of Children: _____

1. Check if you have ever had:

<input type="checkbox"/> High blood pressure	<input type="checkbox"/> Heart trouble	<input type="checkbox"/> Peptic ulcer	<input type="checkbox"/> Cancer
<input type="checkbox"/> Rheumatic fever	<input type="checkbox"/> Poliomyelitis	<input type="checkbox"/> Arthritis	<input type="checkbox"/> Asthma
<input type="checkbox"/> Kidney trouble	<input type="checkbox"/> Tuberculosis	<input type="checkbox"/> Epilepsy	<input type="checkbox"/> Diabetes

2. Check if any member of your family has ever had:

<input type="checkbox"/> High blood pressure	<input type="checkbox"/> Heart trouble	<input type="checkbox"/> Peptic ulcer	<input type="checkbox"/> Cancer
<input type="checkbox"/> Rheumatic fever	<input type="checkbox"/> Poliomyelitis	<input type="checkbox"/> Arthritis	<input type="checkbox"/> Asthma
<input type="checkbox"/> Kidney trouble	<input type="checkbox"/> Tuberculosis	<input type="checkbox"/> Epilepsy	<input type="checkbox"/> Diabetes

Explain who had these illnesses: _____

3. What vaccinations or inoculations have you had? Give dates _____

4. Have you ever had an electrocardiogram? If so, give date and name of attending physician: _____

5. Have you ever had a serious accident or operation? Explain _____

6. Have you any impairment of sight? _____ of hearing? _____

7. If your weight has changed in the past two years, state approximate loss _____ or gain _____

8. Have you ever been rejected for life insurance? _____

9. Have you ever received treatment for alcohol or drug habits, or any form of chemical dependency?

When and where? _____

10. Do you smoke? _____ How long? _____ How much? _____

11. Have you ever been under observation or treatment in any hospital or sanitarium for a physical or nervous condition? _____ Explain: _____

The above statements are true, complete, and accurate to the best of my knowledge.

Signature: _____ Date: _____

Part 2: Medical Examiner's Report (to be completed by the physician) Date form completed: _____

1. General appearance _____
2. Personal hygiene _____
3. Height _____ Weight _____ Temperature _____
4. Pulse before exercise _____ After exercise _____
Blood Pressure before exercise _____ After exercise _____
5. Vision _____ Hearing _____
6. Condition of mouth and throat: _____
Pharynx _____ Tonsils _____
Mucous membranes _____ Teeth _____
Tongue _____ Gums _____
7. Evidence of goiter, enlarged glands, or other tumors _____
8. Evidence of varicosity _____ Hernia _____
9. Evidence of disease or abnormalities of:
Heart _____
Lungs _____
Thorax _____
Spine _____
Genitalia _____
10. Evaluate nervous and mental condition: _____

Laboratory Tests: (indicate if within normal limits, if abnormal, please specify areas of abnormality)

- Urine _____
- Chest X-ray _____
- Complete blood count (Hemoglobin, PCV, white count) _____
- Pap smear (if applicable) _____
- Electrocardiogram (base line EKG) _____
- Other _____

Summary of Findings and Recommendations

_____ This person **IS** medically capable of handling work which often requires 60 hours or more of work per week, segments of which are potentially emotionally stressful.

_____ This person **IS NOT** medically capable of handling work which often requires 60 hours or more of work per week, segments of which are potentially emotionally stressful.

Other major findings: _____

Name of Physician (type or print) _____

Address of Physician _____

Physician's Signature _____ Date of Exam _____

Lay Reference Form – Confidential (page 1 of 2)
New England Conference of The United Methodist Church
Board of Ordained Ministry

Part I -- to be completed by the applicant before sending the form to the person who will be providing the reference.

Name of person about whom this reference is being written: _____

Name of person writing this reference: _____

Full address of person writing this reference: _____

Release: I hereby authorize (person writing reference) _____ to release the information requested below to the registrar of the Board of Ordained Ministry of the New England Conference, recognizing that it becomes part of my permanent file of application for membership in the conference. I recognize that this reference will be kept confidential, and I will not see the reference after it is completed.

Date: _____ Signature: _____

Part II – to be completed by the person providing the reference. After completion, the form is to be signed and sent to the Registrar, Susan Evans, PO Box 709, Londonderry, NH 03053-0709; SsEvns@aol.com, (603) 424-9908. The Registrar must receive this form by January 6 for a February (Associate Membership) Exam or by **September 1**, for an October (Full Membership) Exam.

To the evaluator: The person whose name appears on the first line of this form is applying for entrance into the ordained ministry of the United Methodist Church. This person has asked that you be one of several people to evaluate her/him in this regard. Your response is needed. Thorough evaluations that include areas of concern and limitation are of great value. The material will be used in the screening and nurture of the individual as it relates to the conference.

Please respond to the questions in the context of your church leadership experience, giving specific examples.

What is your leadership role in your local church? Mark the appropriate terms.

Finance Committee Chair Education Committee Chair Church Council Chair
SPR Committee Chair Lay Leader

****Note: Chairperson's reference should reflect the view of the whole committee; if there are differences of opinion, both sides should be expressed.***

Indicate the extent of your contact during the time of your association with this person:
_____ daily _____ frequently _____ infrequently
from (date) _____ to (date) _____

Please complete as much of the following as you are able, skipping only those questions about which you do not have adequate knowledge from your interaction with this person. Please do not complete a question based on what someone else has said to you about the person.

Please respond to the following on a separate sheet(s).

1. Please comment on the effectiveness of this person's ability to communicate:
 - a.) in pastoral relationships
 - b.) in small groups / study groups
 - c.) in preaching, and worship leadership/design
 - d.) the whole Gospel in the larger community
2. How would you describe your pastor as a spiritual leader?
3. Does the pastor give evidence of transformational leadership? Please give specific examples.
4. How do you experience your pastor as a person of spiritual authenticity, integrity, and wholeness?
5. How would you describe your pastor as an administrator?
6. Characterize the way(s) your pastor works with the laity.

Signature of person completing the reference: _____

Date: _____

Send completed reference to: Susan Evans, Registrar – Board of Ordained Ministry
PO Box 709 – Londonderry, NH 03053
(603) 424-9908 SsEvns@aol.com

Clergy Reference Form – Confidential (page 1 of 2)
New England Conference of The United Methodist Church
Board of Ordained Ministry

Part I -- to be completed by the applicant before sending the form to the person who will be providing the reference.

Name of person about whom this reference is being written: _____

Name of person writing this reference: _____

Full address of person writing this reference: _____

Release: I hereby authorize (person writing reference) _____ to release the information requested below to the registrar of the Board of Ordained Ministry of the New England Conference, recognizing that it becomes part of my permanent file of application for membership in the conference. I recognize that this reference will be kept confidential, and I will not see the reference after it is completed.

Date: _____ Signature: _____

Part II – to be completed by the person providing the reference. After completion, the form is to be signed and sent to the Registrar, Susan Evans, PO Box 709, Londonderry, NH 03053-0709; SsEvns@aol.com, (603) 424-9908. The Registrar must receive this form by January 6 for a February (Associate Membership) Exam or by **September 1**, for an October (Full Membership) Exam.

To the evaluator: The person whose name appears on the first line of this form is applying for entrance into the ordained ministry of the United Methodist Church. This person has asked that you be one of several people to evaluate her/him in this regard. Your response is needed. Thorough evaluations that include areas of concern and limitation are of great value. The material will be used in the screening and nurture of the individual as it relates to the conference.

What is your relationship to this person? Mark the appropriate terms.

Seminary faculty	Field Education Supervisor	Pastor with whom they have worked
United Methodist Colleague	Ecumenical Colleague	Other clergy _____

Indicate the extent of your contact during the time of your association with this person:

____ daily ____ frequently ____ infrequently
from (date) _____ to (date) _____

Please complete as much of the following as you are able, skipping only those questions about which you do not have adequate knowledge from your interaction with this person. Please do not complete a question based on what someone else has said to you about the person.

Please respond to the following on a separate sheet(s).

1. What strengths does this person bring to ordained ministry?
2. Name any areas in which you feel this person should improve to enhance his/her personal and/or professional effectiveness.
3. Please comment on the effectiveness of this person's ability to communicate.
4. How do you experience this candidate as a person of spiritual authenticity, integrity, and wholeness?
5. Please express any concerns, comments, or observations that you wish to share about this candidate.
6. Does this candidate give evidence of transformational leadership?

Signature of person completing the reference: _____

Date of completion: _____

Send completed reference to: Susan Evans, Registrar – Board of Ordained Ministry
PO Box 709 – Londonderry, NH 03053
(603) 424-9908 SsEvns@aol.com

BOARD of ORDAINED MINISTRY
The Entrance Committee

A Policy for the Candidacy Examination Process
for Provisional and Full Membership

A Vision for the New England Conference: Transformed by the Holy Spirit, united in trust, we will respond to God's call to proclaim Christ boldly to the world.

CRITERIA:

According to the standards for entrance into the Certified and Ordained Ministry of the United Methodist Church, "fitness is the foundation on which competence, readiness and effectiveness are developed." The candidacy process assumes that the call of a candidate has been examined at the District Committee level. Consequently the candidacy process at the Board level focuses on "fitness". While competence is developed throughout the candidate's study, supervision and reflection, **READINESS** for ministry is the criteria for Provisional membership; **EFFECTIVENESS** is the criteria for ordination as a Deacon or Elder and Full membership in the Annual Conference. (see the Candidacy Guidebook for a further discussion of the relationship of Fitness, Competency, Readiness and Effectiveness.)

[I] PROVISIONAL MEMBERSHIP:

READINESS: Potential - the candidate can demonstrate fundamental personal and academic resources to grow sufficiently from professional experience under supervision.

In the Board's examination procedure, the candidate must:

- Give evidence of his/her faith
- Be articulate in his/her understanding of the distinction between conversion and call
- Recognize that ministry requires a spiritual center (a love of God, neighbor, and self) as well as learned skills
- Be able to articulate a Wesleyan theology of grace, and his/her own experience of grace
- Give evidence of clarity about his/her call to ministry in the UMC, particularly in relation to ministry as a calling vs. a career.
- Demonstrate an aptitude, temperament, and sufficient desire to be engaged in transformational ministry.
- Demonstrate an ability to reflect biblically and theologically* including use of the quadrilateral (see definition for theological reflection below).
- Be aware that required and fundamental studies including at least one unit of CPE (CPE for those on Elder's Track) must be completed before attaining full membership
- Demonstrate having reflected upon his/her own life story and can frame his/her life in a context using theological language.
- Have addressed his/her own family system in terms of its impact on his/her call and ministry.
- Demonstrate a basic ability to formulate worship, to preach and to teach (Elder's track)
- Give evidence of a personal relationship with Jesus Christ.
- Show that s/he has reflected on the itinerant system.
- Have begun to develop a self-conscious awareness of leadership styles in light of his/her own.
- Demonstrate a willingness to continue to learn, grow and improve pastoral practice.
- Demonstrate an understanding of, and commitment to, the Social Principles of the United Methodist Church.

AND: Give evidence of self-disciplined work habits; a self directed and disciplined spiritual life, including self-care.

REQUIRED MATERIALS for EXAMINATION:

- Thorough and cumulative recommendation/report from DCOM.
- Written assessment by candidacy Mentor.
- Psychological assessment within last 7 years.
- Physical examination within 2 years.
- Written theological autobiography verbalizing its relevance to ministry.
- A theological paper on selected items as outlined in candidates' checklist
- An exegesis of a passage from Scripture.

ANNUAL PROVISIONAL MEMBERSHIP REVIEW:

Because the Candidacy Guidebook stresses the importance of supervision in the Provisional membership years ("Your admission as a [probationary] member of the Annual Conference means that you are competent (READY) to practice ministry UNDER SUPERVISION of a clergy mentor"), the BOM must insist on a strong mentoring program. Supervising mentors must be held accountable for their work with Provisional members.

As part of that Supervisory emphasis, the Annual Provisional Membership Review will be seen as a significant part of a comprehensive review towards evaluating the candidate's effectiveness for Ordination and Full Membership. The candidate's theology is expected to be integrated with and integral to all of the material (written, verbal, reported, etc.) being used in the examination.

(1) In each year of provisional membership, as the review team assesses the candidate's development, the candidate will be required to reflect on how his/her ministerial call and professional development has been shaped by a different theological issue (stewardship, evangelism, pastoral care, social justice, professional ethics) using a case study.

(2) At each review, the candidate must demonstrate attention to the areas recommended for improvement from the previous year. The materials from each review year must be readily available to each review team.

(3) An annual report by the candidate's supervisory mentor must be in the review team's packet.

(4) Each year, the BOM shall provide a "learning module" on the theological issue to be discussed either at that review or the year following.

[II] FULL MEMBERSHIP:

EFFECTIVENESS: Actual - The candidate will be able to demonstrate effective pastoral ministry at various essential tasks of ministry.

In the Board's examination procedure, the candidate must demonstrate a mastery of all previous requirements and:

- Must have completed all required and fundamental studies including at least one unit of CPE (CPE for those on Elder's Track)
- Demonstrate the integrity between personal piety and social justice ministry in his/her personal and professional life.

- Demonstrate an understanding of the Wesleyan practice of Holy Communion.
- Demonstrate a commitment to the connectional system.
- Demonstrate the ability to assess the local church in its internal and civil community context and plan/act appropriately.
- Demonstrate an understanding of and a commitment to transformational servant leadership.
- Demonstrate a commitment to being a life-long learner.
- Demonstrate the ability/willingness to seek out and employ appropriate help and resources in his/her ministry.
- Demonstrate the ability to reflect biblically and theologically on his/her on-going ministry.
- Demonstrate the ability/willingness to work on areas of skills, which do not come naturally to the candidate (stretching places).
- Demonstrate the ability/willingness to respond appropriately to supervision. (DS, SPRC, Mentor)
- Demonstrate and provide evidence of vocational growth during years of provisional membership.
- Demonstrate that the candidate has a working knowledge of 21st Century culture, technology, and learning styles, including the use of image in religious experience.
- Demonstrate membership development and evangelism, including such items as new member nurture, confirmation, Baptismal practice, and outreach into the community of the un-churched. (For Elder's Orders)
- Demonstrate that s/he has developed a personal, pastoral and social ethic, and, in particular, that s/he has taken training in anti-racism and white privilege.
- Demonstrate Christian love for the people they are appointed to serve
- Demonstrate an understanding and practice of boundaries
- AND: Give evidence of self-disciplined work habits; a self-directed and disciplined spiritual life and self-care.

REQUIRED MATERIALS for EXAMINATION:

- Psychological assessment within last 7 years.
- One page document on Stewardship and Missiology.
- A thorough and cumulative recommendation/assessment/written report from District Superintendent (when the D.S. is not familiar with the candidate, the D.S. should consult with the previous D.S. in order to adequately report and assess growth).
- Multiple insights from the local church or ministry site (Chairs of SPR, Finance, Education, and Church Council committees; and Lay Leader).
- An assessment from cluster and/or ecumenical colleagues.
- A Sermon and a Bible Study each of which has been preached/taught (video of entire worship service) (Elder's Orders)
- A Peace and Justice Ministry piece which s/he has offered (Deacon's Orders)
- A list of statistical figures from the Conference Journal, and a reflection on how this data represents his/her understanding and practice of transformational ministry. (Elder's Orders)
- A one to two page case study, which deals with an event, experience, or opportunity where the candidate has personally facilitated transformational ministry.

A DEFINITION OF "THEOLOGICAL REFLECTION" (for purposes of evaluating
Readiness for and Effectiveness in ministry.)

Theological reflection is the process of thinking about the meaning of one's life in light of the Christian story. It is the way in which we integrate how we live with what we believe about who God is and what God does in our lives, in creation, in the church and in the world. For purposes of the BOM, then, Theological Reflection has to do with the candidate's capacity (a) to consciously and critically bring to bear in the practical dimensions of ministry the resources of the Christian faith (with particular attention to the use of the Wesleyan Quadrilateral); (b) to articulate the ways in which theology and practice interact (shapes, reinforces, changes); and (c) how they are/are not integrated and the implications of that integration.

Board of Ordained Ministry
The New England Annual Conference
The United Methodist Church

Guidelines for the Examination Process

Assumptions: It is assumed BOM members:

- Have read all the materials sent to them and have made appropriate notes.
- Have listened to or viewed any audio or video material.
(NOTE: It is the responsibility of the Candidate to provide materials that are legible and DVDs that are of good technical quality).
- Have considered the Candidate's material with the appropriate "Evaluation Criteria" (see pages 3 – 9).
- Have been in prayer for the Candidates, for themselves, the BOM and the examination and decision-making process.

(Letters of reference and DCOM recommendations (provisional membership Candidates) will be reviewed and summarized in by one member of each exam team prior to the exam.)

Examination Teams:

- Examination Teams will gather prior to the examination to receive instructions and room assignments, to set up the rooms in a comfortable and appropriate manner, and to prepare for the Examination.
- The BOM Registrar will provide the Candidate's file to the Team. The Team will agree on the way in which the file will be reviewed (Chairperson of the Team? One person on the Team assigned to read, etc.).
- The Team will determine how the file will be used (flag issues, materials that appear inconsistent with the way Candidate presents self, etc).
- For Provisional Membership, a Team will examine only Candidates in one category (Autobiography, Theology, etc.).
- For Full Membership, one Examination Team will examine a Candidate in all categories of the examination.

Examination Preparations:

- The Examination Team will make sure the room is set up in a way that is conducive for the examination and which will help put the Candidate at ease.
- After the Examination Team members have become acquainted, the Teams should make assignments of responsibilities: (a) a timekeeper, (b) a note-taker, (c) a team member to lead the Candidate to the examination room, (d) someone who will open with prayer. The Team may invite the Candidate to close the examination with prayer, making sure to invite the Candidate to offer the prayer in his/her language of choice.
- Using the criteria of Readiness for Provisional Membership Candidates and Effectiveness for Full Membership (**NOTE:** see the Document "A Policy for the Candidacy Examination Process..." passed by the BOM 2/05 and revised 4/08 for definitions of Readiness and Effectiveness), team members will begin to share general impressions of strengths and

concerns arising out of the Candidate's materials. This sharing provides the Team with areas that it might focus on during the examination.

➤ The Team then:

- Develops key questions it would like to ask
- Decides upon an appropriate first question (an open-ended question that relates to the Candidate's strength)
- Assigns to specific Team members some of the questions developed earlier by the Team
- Agrees on the order and sequence of questions
- Makes sure 5-10 minutes is provided to the Candidate at the end of each examination session to ask questions, amplify a response to an earlier question, and/or elaborate on prepared material not discussed
(NOTE: The above are suggested guidelines; other appropriate questions may arise during the course of the examination)
- Following a Full Membership examination session, the Team may reach consensus about clarifying or follow-up questions (if any) for the Candidate when s/he returns for the next session with the Team.

➤ After the final examination session, the Team reviews its impressions of the Candidate's responses, the effectiveness of the Candidate's engagement with the Team, the strengths and concerns raised by the written and taped material and the way these are viewed in light of the Examination discussion, the overall ability of the Candidate to reflect theologically, and all of this in light of "The Evaluation Criteria" (following pages). The Team then draws conclusions about the recommendations it would make to the full Board regarding the Candidate's qualifications. The Examination Team should then complete the Examination Team Report Form, listing:

- Its recommendation "qualified" or "not qualified"
- Candidate's strengths
- Candidate's growing edges
- How the Candidate demonstrates or shows potential for transformational leadership
- Recommendations for further work
NOTE: Try not to list more than 3 or 4 points for each of the categories. A legible copy should be given to the Registrar as soon as possible and certainly before the reporting session.

Revised: April 2008, February 2009

Paragraph references are from 2008 Book of Discipline

Criteria for Evaluation: Autobiography

Integrating:

1. The Candidate is self-aware and willing to examine self realistically.
2. The Candidate's descriptions of "vocation," "self," and "ordination to Word, Order, Sacrament, and Service" fit together. In the case of Deacon, the Candidate's description of Word and Service fit together. The Candidate effectively communicates a passionate commitment to live his/her call in the present and in the future (§335.b.1).
3. The Candidate discusses his/her personal gifts for ordained ministry, his/her strengths and weaknesses and posits solid strategies for change (§335.c.3).
4. While describing all/various experiences, including crises and the most difficult situations, the Candidate evinces a basic trust in God strong enough to allow for pastoral care in the vast majority of situations s/he may encounter in ministry.
5. The Candidate incorporates personal suffering into self-understanding so as to enhance empathy, personal growth and his/her theological understanding of suffering and grace.
6. The Candidate has incorporated a theology of stewardship of time and resources into his/her personal life.
7. The Candidate cultivates habits that contribute to physical and emotional health, and effectively balances work with Sabbath and rest (§335.a.6).
8. The Candidate will be able to write about and articulate the relationship between his/her conversion to Christ and the call to ordained ministry.

Relating:

9. The Candidate knows self to be justified by faith, describing a strong, maturing personal relationship with the Trinity.
10. The Candidate evidences strong love/reverence in expressed feelings toward others, effectively integrates vocation and personal relationships and evidences integrity in all personal relationships (§335.a.6).
11. The Candidate demonstrates the ability to minister to all persons without regard to race, color, national origin, social status or disabilities (§335.c.4).
12. The Candidate participates in peer relationships in a way that fosters emotional health and spiritual growth.
13. The Candidate demonstrates both deep reflection and personal experience in describing the theological value of *koinonia*.
14. The Candidate effectively gives evidence of a deep personal commitment to peace and justice ministries (§335.c.6).

Effecting:

15. The Candidate articulates clearly how God has effected change in his/her life and participates in his/her everyday life. The Candidate has clear ideas of how God can best use him/her in ministry.
16. The Candidate can articulate how his/her personal life affects his/her ministry.

17. The Candidate participates with openness and anticipation of learning in both annual evaluations with the SPRC and with the D.S. (§334.2.b.) (While Deacons meet annually with the D.S., they may not be evaluated annually by an SPRC.)
18. The Candidate is aware of our Conference's continuing education policy and expects continued growth in vocational competence and effectiveness (§334.2.d).
19. The Candidate has goals for personal spiritual growth, a vision of spiritual self in the future within the context of a theology of sanctification.
20. The deacon Candidate shall indicate when and how he/she participates in professional development in his/her specialized field.

General Questions for the Exam Team to Consider (Autobiography):

1. How has the Candidate experienced God, and how has that experience influenced his/her call to ministry? Is there a Biblical character or story that best describes his/her experience of God?
 2. Make sure that the Candidate has clarity about the relationship of conversion and call in his/her life. Can they write about and articulate that relationship?
 3. Does the Candidate love God and does the Candidate exhibit a healthy love of self and genuine love of the people with whom he/she works and ministers?
 4. What evidence does the Candidate exhibit throughout the examination process that he/she has a true passion for ministry, that he/she is redeemed with a growing, joyful relationship to God in Christ, and that he/she is sustained by the spiritual disciplines?
-

Criteria for Evaluation: Theology and Ethics / Case Study

Integrating:

1. The Candidate's general theological framework is comprehensive, consistent and Wesleyan.
2. The Candidate can explain both **how** the quadrilateral informs his/her theology and **why** each of the four parts is important to a comprehensive theology both for spiritual growth and effective pastoral care.
3. The Candidate's images of God are sufficiently powerful to assure a strong, growing spiritual life on the front lines (§335.a.1).
4. The Candidate has a doctrine of humanity and an understanding of sin that is realistic and broad enough to allow for adequate pastoral care (with help, if necessary) in any situation (§335.a.2).
5. The Candidate has a sound and well-developed Christology, an internalized knowledge of the Lordship of Jesus Christ, and a soteriology in line with his/her thinking on question # 4 (§335.a.3).
6. The Candidate has a strong Sacramental theology (§335.a.7).

Relating:

7. The Candidate's ethics are well thought through and comprehensive, reflecting deep care for others.
8. The Candidate articulates solid and comprehensive concepts of peace and justice in both his/her theology and understanding of community and shows evidence of experience in such ministries (§335.c.6).

9. The Candidate offers a cogent theological explanation of the nature of pastoral care and of the role of the pastoral caregiver. The Candidate understands that all pastoral conversations are of a confessional nature (§335.c.5).
10. The Candidate is fully aware of the nature and subtlety of boundary issues and can identify situations where either boundary issues or spiritual inexperience would suggest that the Candidate as pastor seek peer support or supervision.
11. The Candidate can articulate and incorporate in his/her life the concept of “servant leadership” and evinces a solid theology of both lay and ordained ministries.
12. The Candidate appreciates the covenantal bond of UM clergy (Elders and Deacons), the ethics involved in this bond, and the ways we support each other’s ministry.

Effecting:

13. The Candidate can communicate effectively both orally and in writing (§335.7).
14. The Candidate shows an appreciation of God’s power in working through the Church.
15. The Candidate has a strong ecclesiology, integrated with sense of self/vocation that includes the nature, purpose, history of the Church, and its relationship to other religions (§335.a.8).
16. The Candidate can explain, within the context of his/her ecclesiology, the value of the following aspects of our denomination life: connectionalism, itinerancy, apportionments, and authority, and is committed to the disciplinary understanding of each of them (§335.c. 1 and 2).
17. The Candidate recognizes the importance and uses of visioning and situational analysis in ministry.
18. The Candidate can articulate a vision of the future of the UMC in a changing world and sees self in a servant-leader role relative to that vision.
19. The Candidate has a strong eschatology and/or theology of the Realm of God, theologies of resurrection and of eternal life, all adequate to effective ministry relative both to personal salvation and to justice ministries, particularly among the marginalized (§335.a.9).
20. The Candidate articulates theologically and owns the role of church administrator (other roles?) in local church (not applicable to Deacons).

General Questions for the Exam Team to Consider (Theology/Doctrine):

Is the Candidate grounded in Wesleyan theology, specifically in his/her understanding of Wesley’s definition of grace? What is his/her personal experience of grace, and is he/she able to share the meaning of grace with others, i.e. how is grace expressed in his/her own life?

Case Study (full membership):

How does the Candidate understand and practice “transformational ministry”?

Criteria for Evaluation: Proclamation of the Word

Candidates for Provisional or Full Membership in the *Order of Elder*: Sermon Manuscript

Integrating:

1. The Candidate can analyze how listening to and/or reading sermons has affected his/her spiritual growth.

2. The Candidate can describe roles for the Holy Spirit, the preacher and the listener in the act of preaching.
3. The Candidate appreciates the discipline of exegesis, and effectively incorporates exegetical insights in the sermon.
4. The sermon preaches the Gospel and links it to contemporary experience with integrity and depth.
5. The sermon is organized in a manner that is easy to follow. The Scripture text remains central and is allowed to shine forth.
6. The sermon is theologically sound, cohesive, and consistent both with the general theology of the Candidate **and** with a theology informed by the entirety of Hebrew/Christian scripture.
7. The Candidate has a carefully reflected position on the use (or non-use) of the lectionary.
8. Here and/or elsewhere the Candidate demonstrates the ability to use standard English grammar, syntax, and punctuation. (This question is designed primarily for those Candidates whose first language is English.)

Relating:

9. In the sermon, the Candidate addresses the spiritual needs of that congregation.
10. The Candidate is sensitive to the power of the words spoken from the pulpit and can recognize the dangers of ill-considered communication, personal agendas and demagoguery.
11. The Candidate evidences growth in his/her ability to deal with positive and negative feedback to sermons.

Effecting:

12. The sermon invites a contemporary response to God's word – a call to commitment, reflection and action.
13. The sermon reflects the Candidate's personal faith in God's power to effect change and transformation.
14. The Candidate demonstrates the ability to use appropriate and effective rhetorical devices, and perhaps also ways to communicate scriptural insights in non-verbal or non-traditional ways.

General Questions for the Exam Team to Consider (Sermon preparation):

1. How does the Candidate go about the preaching task (length of time and method of preparation)?
2. What resources are used in sermon and worship preparation?
3. How does the Candidate personally arrive at the insights around which the sermon is built and integrated into the design of the worship service?
4. How does the Candidate typically choose the text used for sermon emphasis (does the Candidate use the lectionary, or a thematic approach)?
5. Does the Candidate include teaching/interpretation of the Sacraments? In what ways?
6. How does the Candidate experience/encounter the Holy Spirit in sermon/worship preparation?

Candidates for Full Membership in the *Order of Deacon*: Choice of Sermon Manuscript OR an alternative creative expression (in a medium of the candidate's choosing that can be reproduced and distributed to exam team members) demonstrating how he/she witnesses to the "Gospel of Jesus Christ" in his/her particular setting.

1. The Candidate shall articulate how scripture is central to and integrated into his/her ministry. How does the Candidate experience/encounter the Holy Spirit in his/her work?
 2. The Candidate owns his/her role of “servant-leader” with grace and authority.
 3. The Candidate shows awareness of the immediate needs of the world and can relate these needs to the Church, in his/her place of appointment.
 4. Does the material/method chosen by the Candidate to express how he/she witnesses to the Gospel demonstrate the integration of his/her understanding of the role of a deacon with the practice of his/her work as a deacon?
-

Criteria for Evaluation: Sermon Delivery and Worship Leadership

Integrating:

1. The Candidate describes meaningfully the role of worship in his/her own spiritual journey.
2. The Candidate can articulate the role and expectations of an elder “servant-leader” as worship leader and owns that role with grace and authority.
3. The Candidate can articulate a meaning for each act of worship included in the bulletin and can explain the absence of any traditional act of worship that may be omitted from that order of worship.

Relating:

4. The Candidate evinces respect for the congregation during worship and demonstrates an understanding of psychological and spiritual developmental processes so that the worship experiences can be tailored appropriately.
5. The Candidate shows awareness of the immediate needs of the congregation during the service (i.e., preoccupation with a crisis, the temperature in the sanctuary).
6. The Candidate can articulate a theoretical relationship between worshipers and leader during worship.
7. The Candidate can respond openly and helpfully to all sorts of congregational expectations of worship and both negative and positive feedback.
8. The Candidate relates in worship to children, youth, older people and those with special needs in a way helpful to their development of faith, hope and love.

Effecting:

9. The Candidate sees the possibilities of the worship dynamic to change lives and can describe worship that is “effective”.
10. The Candidate employs rhetorical and artistic devices that enhance worship.
11. The Candidate can discuss the values of the various degrees of formality of ritual in relation to the effectiveness of worship.
12. The Candidate has a sense of the history and ecumenical varieties of worship that will add both perspective and possibility to the Candidate’s creation of and leadership in worship.

General Questions for the Exam Team to Consider (Sermon delivery):

1. How does the Candidate experience/encounter the Holy Spirit in preaching and worshipping?
 2. Is the Candidate able to bring people into the living presence of God with a response of adoration, thanksgiving, and praise?
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Criteria for Evaluation: Bible Study

Integrating:

1. The Candidate can articulate the impact of Scripture on his/her own spiritual journey.
2. The Candidate shows evidence of continuing reflection on how his/her life experiences influence his/her interpretation of Scripture.
3. The Candidate can articulate the spiritual value of exegesis, and has evidenced a skillful engagement of the Scriptures as a means of grace.
4. The Bible Study exhibits effective exegetical skills also by revealing the historical, cultural and theological contexts of the biblical texts to create contemporary insights and applications.

Relating:

5. The Candidate can articulate theologically the role of teacher as servant-leader and own that role with grace and authority.
6. The Candidate shows a clear understanding of the complementary role of clergy and laity in reflection on Scripture and spiritual discernment.
7. The Candidate demonstrates a grasp of group dynamics and an ability to “read” the needs of both individuals and the group.

Effecting:

8. The Candidate understands Scripture as change-agent, transforming lives and raising up disciples and its power to challenge and change the whole Church.
9. The Bible Study evinces clear goals, both realistic and visionary.
10. The Candidate uses pedagogical techniques appropriate and effective for attaining goals.

General Questions for the Exam Team to Consider (Bible Study):

1. Ask the Candidate to comment on their ability to derive insight from the text used in the study.
 2. What is the purpose of Bible Study, in the context of “transformation”?
 3. Did the Candidate encounter/experience the Holy Spirit in the Bible Study process? If so, where, and in what way?
 4. (For full membership elder Candidates) Based on the written summary of the evaluations of the Bible Study by the study participants, how will the Candidate approach the next study?
-

Throughout the Exam Process:

Throughout the entire exam process (for Candidates at all levels), Board exam team members will be attempting to determine whether the Candidate has the potential for (Provisional Members) or is exercising effectively (Full Members) “transformational leadership” in both the theory and practice of ministry.

For example:

1. Is the Candidate able to assess the pastoral situation (context, history, data, etc.) and adapt appropriately?
2. Does the Candidate lead in evangelism and social outreach in a way that includes his/her own personal practice with a strategic understanding of the way the laity is incorporated?
3. Does the Candidate have the ability and commitment to meet regularly and prayerfully with individuals and families of the parish and those with special pastoral needs?
4. In what ways does the Candidate have the ability to use theological/Biblical language, ideas, and imagery to practically impact the lives of individuals and the church community (e.g., worshipful work as a way to structure committee meetings)? Can the Candidate interpret Scripture and the theology of the church, applying these practically to teaching and preaching?